User Advisory Group Minutes

Title: User Advisory Group
Date of Meeting: 06 December 2016
Location: The National Archives, Kew

Attendees:

Staff
Caroline Ottaway-Searle (COS) – Director of Public Engagement (Chair)
Lee Oliver (LMO) – Head of Quality and Excellence
Emma Jay (EJ) Academic Programmes Manager (for item 2)
Kate Wheeler (KW) - Collections Knowledge Manager (for item 3)
Tom Gregan (TG) - Head of Document Services (for item 5)
Delia Brooks (DB) Strategic Business Change Manager (for item 5)
Foluke Abiona (FA) – Accessibility and User Engagement Manager
Joanna Robinson (JCR) – Customer Support Officer (Minutes)

Delegates
Geoff Monks (GM) – Academic Users
Nell Darby (ND) – Online Users
Margaret O’Sullivan (MO’S) – County/External Archives
Carol Beardmore (CB) – County/External Archives
Kristina Bedford (KB) – Map Room Users
Adam Chambers (AC) – Map Room Users
Anne Samson (AS) – On site Personal Interest Users
David Shiels (DS) – Early Academic Career Researchers
Jacqui Kirk (JK) – Independent Researchers

Apologies
Nigel Browne-Davies (NBD) – Equality and Diversity
Martin Farr (MF) - Academic Users
Francis Howcutt (FH) – Family History Societies
Sarah Pearson (SP) – On site Personal Interest Users
Howard Llewellyn (HL) – Equality and Diversity
Camilla von Massenbach (CM) – Online Family Historians

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<th>Item</th>
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<td>1.</td>
<td>Minutes, Introducing new delegate, Matters Arising and general updates</td>
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<td>1.1</td>
<td>COS welcomed all to the meeting. She explained that the new delegate Camilla von Massenbach was unable to attend her first meeting today. She advised delegates that Jo Pugh had now finished his PhD and started a new job at TNA, and would therefore no longer be attending UAG as Student User Representative.</td>
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1.2 COS advised delegates that Isobel Hunter, Head of Archives Sector Development, was unable to attend today’s meeting and that instead Kate Wheeler would be attending to speak about Item 3 on the agenda.

1.3 JK asked about digital continuity problems with Find my Past. She said that documents continue to be transcribed incorrectly. She also said that Ancestry’s new military records website Fold3 is causing much negative comment on Twitter.

COS said we need to carry out more research on the ongoing digital continuity problems and transcription errors. She requested that delegates inform us of any errors they come across.

1.4 (Item 2) COS advised delegates that Isobel Hunter will attend the UAG in the new year, to discuss the archive policy consultation process further.

1.5 (Item 3.2) COS repeated that if any delegates wish to know how long they or other delegates have served in the UAG they should contact FA.

1.6 (Item 5) COS thanked delegates for their very helpful feedback on the Great Wharton project. She said that although we cannot make changes to the degree that delegates wanted, it was very useful to hear their thoughts and the points raised would certainly have an influence on future projects.

1.7 (Item 6.6) LO said the matter of stands in the reading rooms for UAG delegates was close to resolution.

### 2. Introducing Academic Engagement at The National Archives

2.1 COS introduced EJ, Academic Programmes Manager, to delegates.

2.2 EJ spoke to delegates about her role managing TNA’s Academic Programme as part of the Academic Engagement Team. She explained that the Academic Engagement Programme is the co-ordinating centre for TNA’s engagement with our academic audience.

She advised delegates that collaboration is vital to the aims of the programme as many different TNA departments work with academic institutions, individuals and research funding consortiums.

She detailed TNA’s history of collaborative projects including the academic doctoral partnerships, PAST programme, academic open days, and the DCDC conference which is a collaborative effort with Research Libraries UK.

EJ said that as an Independent Research Organisation TNA wants to foster new collaborations, diversify our research, while improving and enhancing our profile with academics. She explained that TNA is known for history, but we also have strong data science and digital expertise, and want to promote this to the academic community.

EJ then spoke about the Academic Landscape Scoping Study, which examines topics such as worldwide research trends, digital research, changes occurring in the academic landscape such as funding challenges, and TNA’s reputation in the academic community.

She explained that TNA responded to this study with the Academic Engagement Roadmap. This sets out the ways in which TNA wants to respond to the challenges and opportunities the Scoping study highlighted. EJ said the Roadmap and the Scoping study will be published on TNA’s website shortly. EJ said she was keen to hear delegates’ comments.
| 2.3 | CB said TNA does not have a good reputation for research - she had no idea that TNA actually did carry out research. She also warned that TNA should be careful how it presents its plans for expanding and promoting research opportunities for staff. As TNA is the best funded archive institution in the UK, if it is seen to be using its funds to send staff on research trips, or allow them sabbaticals, career researchers who struggle for money in academia could be resentful. She said that the future of funding in Higher Education is precarious and further advised TNA against antagonising the academic community by over-promotion of its funding advantages. |
| 2.4 | EJ responded that TNA is very aware of the challenges academics face and that these challenges are taken into account and addressed in the scoping study. She also said the whole academic community faces challenges concerning time and funding, and this is something the Academic Engagement Team wants to further investigate. |
| 2.5 | MO’S said that everybody would support the sharing of academic expertise. However she pointed out that while the Academic Engagement Programme and Research Roadmap sounds like a long term strategy, most academic projects work on various different timescales, some of which are short term. She asked if this fact has been considered, and pointed out that sustainability is a key factor for the programme to be successful. |
| 2.6 | GM asked how TNA collaborates on research. He also advised that TNA safeguard its independence when collaborating with universities, as they could end up dominating projects. |
| 2.7 | EJ agreed that academic projects work on different timescales and noted that TNA’ s year starts with the business year in April, whereas in the academic sector the year runs on the university terms. This is one of the areas of difference between the cultural sector and the academic sector, which should be borne in mind with any collaboration. |
| 2.8 | GM recommended that TNA starts putting its data on Cloud Storage, and spoke about the research data of the Economic and Social Research Council. |
| 2.9 | CB said she believes TNA is missing an opportunity and that like the Open Access Research Repository at the University of Essex, TNA should ensure that all its data sets are open access. She said that ESRC is looking to fund projects on
which 80% of the research has already been done. This provides final funding for your research project, and as the research completed up to that point has to be published before the final funding is provided, work already carried out is not repeated. Like the National Repository at Essex, TNA should take up some of the UK Data Archive digital storage space so that research is up to date and useable. She commented that working with ESRC would be good for TNA in terms of cloud storage. It would mean records are easy to access and TNA would also be working with academics in a variety of ways.

EJ responded that TNA has its own Open Access Repository on the TNA website. She did not know what TNA’s longer-term plans are for the storage of research data.

*Post-meeting note from EJ:* we are currently exploring where the data from our funded research projects should go – whether in our own Open Access repository or elsewhere – and this would depend on the requirements of the funder. So far TNA has not been the lead partner in any ESRC-funded projects.

2.10 ND pointed out that her university provided a ‘behind the scenes’ tour of TNA when she was a student, which was a very useful experience for her.

COS agreed that this was an excellent opportunity for students and that such schemes are definitely on the agenda as a way for students to engage with TNA.

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<th>3. Manorial Documents Register/Local Archives and Discovery</th>
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<td><strong>3.1</strong> COS introduced KW to delegates and explained that she would be talking about Item 3 in place of Isobel Hunter.</td>
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<td><strong>3.2</strong> KW told delegates that instead of the planned update, she would be focusing on upcoming changes to the Discovery platform. She explained to delegates that her role heading the Collections and Audiences Insight team in Archive Sector Development involves promoting and enabling online collection discovery, promoting data standards and enabling archives to drive researchers to their collections.</td>
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<td><strong>3.3</strong> KW explained that ‘Manage Your Collections’, a cataloguing tool currently in development, will allow archives to add their own catalogue details to Discovery. She said these changes will have a huge impact on content in Discovery and the amount of information that collections researchers are able to access. She explained that 60% of London borough archives currently have no digital catalogue and it is therefore difficult to find out what such archives actually hold. She explained that a key part of TNA’s remit is to act as sector lead. TNA believes that MYC will help us fulfil that obligation by assisting archives which currently suffer from a lack of digital expertise to open up their collections, much of which is being missed due to lack of digital catalogues. KW said that data from other archives was last updated on Discovery in 2008, at the end of the old Access to Archives project, and many archives need to update the A2A data with new catalogue information and accessions data. As there is no international standard for documenting accessions data, the resulting inconsistencies mean a high level of data cleansing by TNA is needed before data can be shared with researchers. KW noted that most newly accessioned collections will not yet have been processed by archives, and are therefore uncatalogued and not checked for sensitive data, meaning most of the collections are not accessible. She advised delegates that it is a mammoth task to</td>
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organise the data we have.

KW said that while there are 300 archives that submit data for the new accessions survey each year, A2A has data from over 400 archives. Yet there are 2000 archives in the UK. She said there is a lot to organise to ensure archives can be made available for researchers, but also make sure it is easy for archives to administer their holdings.

She said we are developing multiple points of entry to those archives which are currently difficult to access. The archives we work with are at various stages in their administration, and we work in different ways with those already using digital tools, and those which still use card catalogues, which we can provide with training to help raise data standards and enable them to improve user experience online and offline. 

She said we are currently at the stage of consulting with and having dialogue with different sections of the sector about these issues and are keen to ensure that MYC provides archives with the tools they need.

KW asked if UAG delegates would come to TNA in Spring 2017 to give feedback on these plans from academics in their respective user communities, as we want to get this message out to the sector. She said we will begin targeted communications in Spring 2017 when the development of Manage Your Collections will be more advanced. She added that while TNA is committed to driving forward with this project, the launch will not be the final ‘product’ and we welcome suggestions.

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3.5 JK said she prefers Discovery to CALM.

3.6 CB said the plans to increase opportunities for updating wider archival data were brilliant. She said that Derby archives will be pleased about the plans to update local archives’ catalogues as they have problems with their old catalogue on Discovery. She said that Northampton archives are unable to update their catalogue at present as they do not have the funding to do so; they currently have only one archivist as this all they can afford. She added that they are very much in need of expertise and training.

3.7 KW agreed that Northampton’s current circumstances are difficult and noted that for many archives reducing their cataloguing backlog is not something they can achieve without external funding. She mentioned the coming relaunch of the Cataloguing Grants Programme which is taking place after an extensive review and which is being refreshed to meet archives’ needs and concerns in this area.

3.8 CB said many archivists feel overwhelmed by the idea of digitisation of archives and cataloguing; they do not think it is something they will be able to get to grips with. She said it will be very useful to provide them with the information and training they need, and to produce standard guidelines for archives.

3.9 KW spoke about the importance of data standards for cataloguing as without this it is impossible for researchers to consistently find and access the material they need.

3.10 AS said that the British Library has an Endangered Archives Programme, and added that it sometimes seems there should be an endangered archives scheme for the UK. She said the BL must have more money than most if they can help
countries outside the UK preserve their archives.

KW agreed and mentioned the ‘Collections at Risk’ consultation which ASD is currently carrying out. This is looking at where there are gaps in collecting and where material is being missed by archive services, and the impact this is having on the record. A brief discussion on the impact of funding on collecting (whether more WW1 material is reaching archives because of the grants available in this area) showed that there is much interest in this area.

3.11 COS said our new digital director John Sheridan will be able to give delegates an update on this next year.

4 Space Programme Update

4.1 LO gave delegates an update on the Space Programme at TNA. He explained that this project is enabling us to re-purpose the space in the Research and Enquiries room to a multi purpose, vibrant, welcoming learning environment and event space, in line with the cultural white paper. The events space will be flexible and multipurpose, with the capacity for up to 250 seats. It will allow us to cater to a wide audience including serious researchers (a term which LO explained was coined by our architects, and not a term used by TNA), families, school children and adult learners. It will also allow us to hold more ambitious events and activities. In addition, the redevelopment means that the current Talks room can be made in to a second learning space before further re-development in the future. LO explained that the ceiling will be raised to allow tiered seating to be installed. The conference space has been sound attenuated to ensure that noise will not become bothersome. He said the first stages of construction will begin in January 2017, and the project should be completed by April 2017.

4.2 CB said the project looks exciting. She asked if delegates could have a site visit in March.

LO agreed and said we could arrange that.

4.3 CB asked how development was being funded.

LO said TNA was funding this phase ourselves, but that it is part of a wider scheme that will require external funding.

5 Record Copying update

5.1 COS introduced DB and TG, who gave delegates an update on record copying.

5.2 DB advised delegates that before February 2016 there was a lot of customer dissatisfaction with the record copying service we provided. This was because the system we had in place made it difficult for customers to find and ask for what they wanted, and it was not always possible for us to find exactly what they wanted. This led to dissatisfaction for inexperienced users. The process involved the customer asking for what they wanted, and TNA staff looking for it. DB said this process took far too long. We would locate a document and provide an estimate for free, but then the customer may decide not to order. Or, we may look for a document but be unable to track down what the customer was looking for.

In February 2016 we launched a new service, to improve customer service,
which is our driving force, and to make the back office system more efficient. We introduced a charge of £8.24 to locate the document, assess its suitability for copying and give an accurate quotation based on the number of pages involved. The ordering process was incorporated directly into Discovery. DB said we also wanted to encourage customers to order the digital version of the record rather than a paper copy. These changes made a huge difference to TNA in terms of costs, queries and complaints. It has also enabled customers to decide if they will be able to find the documents they need.

5.3 DB then said that previously, 32% of enquiries had led to a copy being bought. Now, 85% of enquiries lead to a copy being bought. She said there has been a 250% increase in digital copies being produced and an 82% decrease in hard copies being produced. She said that our income stream has remained the same, and we have reduced expenditure on toner and postage because of these changes.

5.4 COS said that UAG delegates had previously expressed concerns about the effects of the changes to record copying.

5.5 TG said it was important to recognise the contribution that IT colleagues had made to the successful public reception of changes in Record copying. He said that the online video explaining the whole record copying process has enabled people to understand the work that goes into it. He said we were concerned that people would be upset because of the new charge, but because of the way the reasons have been presented to the public, the change has gone smoothly.

COS agreed that the film clearly shows the process.

5.6 KB asked whether articles which are digitised for a single paying customer, can then become available on Discovery for all.

DB said this is an interesting question. She said the tricky thing about this is that people often order ‘little’ sections of a particular record series, so making them available on Discovery would be rather piecemeal. However, we are monitoring when orders are placed for whole pieces and will review further.

5.7 AS asked if it would be possible to put the video in a more prominent place on the website. She pointed out that sometimes people carry out research but do not have the knowledge of what a record series really consists of. They will believe that because a record is an available document, it must be easy to produce but don’t realise the scale and intricate structure of some record series. She added that the process of producing documents is presented as an easy process on the television programme ‘Who Do You Think You Are’, and it might help to show people it is not such an instant or easy procedure in real life.

COS said the video works well and it would be good to show people further information on the amount of documents within a series.
5.8 GM asked if there is a one off fee for using Discovery for academic institutions.

LO said there is a facility for institutional subscriptions to Discovery Digital Downloads, but not Record Copying.

5.9 CB asked how the figure £8.24 was decided upon.

DB explained it was a very specifically calculated figure which provides full cost recovery and is cost effective.

5.10 CB asked if the public now have a more realistic idea of what they can expect from the service.

DB said people who request a search are now more committed to seeing it through because of the investment they have made for the initial search.

TG said the previous record copying service we provided was not of as high a quality as we would have wished to provide, but that it is now. He said this has had a knock on effect on customer satisfaction, and the move towards promoting digital documents is a positive step. He said we hope to continue to increase the production of digital copies next year.

5.11 JK asked if digital copies have the document reference shown on them.

DB confirmed that they do.

6. Delegate submitted items.

6.1 Ancestry/Fold3 and TNA subscription

KB said that people are frustrated that material licensed by TNA is going to subsidiary sites, specifically Ancestry, which has made some military records available on their site Fold3; for access to which you need to take out a separate subscription. She said this does not seem fair and that such material could surely come under a World wide package. Can TNA investigate this?

LO read out Gary Thorpe’s response.

6.2 JK requested that this response be put on TNA’s website.

LO said this would not be possible but agreed that details would be sent to delegates to circulate amongst the user groups they represent. He also agreed to JK’s request that it be sent as an attachment to delegates.

6.3 Restaurant layout and loss of seats

KB said there was a feeling that the new restaurant layout, while in no way objectionable aesthetically, was not so successful in terms of having available seating on busy days. She said the perception is that the tables are always full, that to get a seat you are obliged to sit next to strangers, and that people feel bunched and squashed together.

LO said that there are discussions with Estates about providing more seats. He said we do want to provide a happy medium of making better use of the space and ensuring visitors are comfortable. He advised delegates that the catering contract will be retendered next year; at contract renewal times the new catering company
normally provides fresh funding for the restaurant space.

COS pointed out that the seating has been reconfigured, and that there has been no actual reduction in the amount of seating provided in the restaurant. She acknowledged that the benches are not popular but added that they are space efficient, and are also good for providing seating to the school parties we receive.

6.4 COS pointed out that there is now also the new café space on the first floor.

KB agreed this is a very popular space.

LO reminded delegates that this café space in effect also continues through to the Start Here zone.

6.5 AS said more space is needed in the restaurant to return trays, and suggested this be near the food counter.

LO said we will look into this.

**Map Room**

6.6 KB said that the security trials which began in the summer are felt by some to be ongoing. She said that users feel that the Map Room rules are being changed from week to week. She asked when the rules would be ‘set in stone’.

LO said the trials have ended and the rules are now set. If there are issues please let us know, as any inconsistency in advice regarding rules will be the result of staff error, and not change of policy.

6.7 KB said that lamps seem to be disappearing in the MLDRR. She said she is aware that more lamps had been purchased, but many table spaces there don’t have access to lamps. She also pointed out that weights frequently run out.

LO advised that the same numbers of lamps are in the MLDRR now as previously, and advised that there never was a lamp per desk. We will investigate if further lamps are needed. He pointed out that the lamps in the MLDRR are robust and have not needed to be removed for any reason, and that therefore there has been no reduction in their numbers. He added that weights are audited by Collection Care, and that it is possible that more may be ordered or allocated if need be.

KB said less experienced users tend to take more weights than they really need to use, meaning other users lose out. She said she will convey LO’s reply to her user group.

AS suggested that weights may get lost in documents when they are put away.

LO agreed that this is something which does happen and has probably always happened in archives.

### 7. Paper Updates on Cataloguing and Digitisation

7.1 JK said that she has emailed PDFs downloaded from State Papers online to herself, and found that there is no reference number supplied with them. She said this is not a problem if you are only sending one PDF, but if you are sending a number of them, it is very unhelpful to have no indication on the document to say where it is from. She asked that the requirement for a reference number be put in as a licensing condition, along with a note of the source citation.
LO said this requirement is now in place.

7.2 CB asked that further to GM’s question (see above Item 5.8) about university subscriptions to Discovery, whether TNA had considered providing the opportunity to subscribe to TNA services along the lines of an Ancestry subscription.

LO said this is something that has previously been considered, but that it would be a very complicated matter technically.

8 Any other business

8.1 DS asked about the evening event related to the release of Geoffrey Howe’s Private Office papers from HM Treasury.

COS said the feedback from HM Treasury was good, and they are keen to hold another event here. She said the event went really well, with a good panel. She said this was an interesting new enterprise for us and we are keen to repeat it.

8.2 DS said he found evening events difficult to attend and unfortunately he had not been able to attend this. He said that evening is not necessarily a popular time.

COS said the evening time is often chosen because people are usually working in the day. She said we do consider the times of events, but it is often the case that day time is the less popular option. She added that the Archives at Night event is very popular.

LO added that we also have to consider the availability of speakers. He then spoke more about the event, and noted that Lady Howe attended along with her son.

8.3 COS asked if delegates would like us to review what UAG has achieved over the year. She said we were considering sending a questionnaire to all delegates on their views and experiences of the UAG. She said this would also be an opportunity for delegates to suggest what they and their user groups would like to focus on over the coming year.

Many delegates said they would be interested in this, and will consult with their user groups.

8.4 AS said it would be appreciated if the @UkNatArchives Twitter account would retweet other archive related tweets more. She said the account does ‘like’ tweets, and while she understands it cannot endorse tweets she thinks it would be appropriate to promote other archive related accounts by retweeting.

CB noted that Jeff James, Keeper of TNA, is very good in replying and retweeting.

ND said she finds that individual tweeters at TNA are good at retweeting, and that it would be helpful if the official TNA twitter account would match this standard.

8.5 JK mentioned the Twitter Ancestry hour from 7pm to 8pm on Tuesdays.

LO said he would speak to Audrey Collins about this.

8.6 CB said TNA’s Meet the Keeper on-site and online event was very good, and she hoped it would be repeated.

COS said we plan to repeat this event in February 2017.

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<tr>
<th>8.7</th>
<th>COS thanked delegates for attending. She reminded them to look out for the UAG survey we will be sending out, and wished everyone a Happy Christmas.</th>
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<td><strong>Next meeting: Tuesday 14 March 2017, 12:00-14:30</strong></td>
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