Title: User Advisory Group
Date of Meeting: 5 December 2017
Location: Swan Room, Kew

Attendees:

Staff
Caroline Ottaway-Searle – Director, Public Engagement (Chair)
Jessamy Carlson – Partnership and Programme Manager – (Item 1 only)
Kate Wheeler – Head of Programmes and Policy, Archives Sector Development (Item 2 only)
Vicky Iglikowski – Records Specialist, Diverse Histories (item 4 only)
Lee Oliver – Head of Venue Management and Services (items 1-5.1 only)
Catherine Hill – PA to Caroline Ottaway-Searle (notes)

Delegates
Carol Beardmore (CB) - County/External Archives
Kristina Bedford (KB) - Map Room Users
Francis Howcutt (FH) - Family History Societies
Jacqui Kirk (JK) - Independent Researchers
Howard Llewellyn (HL) - Equality and Diversity
Geoff Monks (GM) - Academic Users
Anne Samson (AS) - On site Personal Interest Users
David Shiels (DS) - Early Academic Careers Researchers
Camilla von Massenbach (CvM) - Online Family Historians
Stephen Daglish (SD) - On line Users
Angela Graham (AG) - County/External Archives

Apologies:
Foluke Abiona – User Engagement (TNA)
Adam Chambers (AC) - Map Room Users
Martin Farr – Academic Users
Nigel Browne-Davies - Equality and Diversity
1 Introducing a new delegate, minutes, matters arising and general updates

1.1 COS welcomed all to the meeting and introduced Stephen Daglish, the new Online Users representative

1.2 The minutes of the last meeting were read, and the following comments/changes noted:

Item 1.7 Change DS to HL

Item 1.8 There are FAQ pages on the TNA website. The list will be curated and the links added to the UAG induction pack.

Item 2.7 The list of local accommodation is not something TNA is able to influence on web search engines.

Item 3.3 Isobel Hunter followed up on the Regional Archive issue – See Annex A (i) for a written answer.

Item 3.6 CH to share the link on “Income Generation Guidance” from the TNA website with the delegates

2 First World War (FWW 100) – update Jessamy Carlson, Partnership and Programme Manager

2.1 JC updated the Group on TNA’s plans for the last part of the FWW 100 programme. With eleven months to go the programme has been quietened down ahead of a final burst of activity in August/September 2018 to mark the Armistice. During this quiet period staff will be concentrating on researching a range of stories that TNA can cover, including areas that are traditionally less known about (e.g. first and second generation German nurses). JC would be happy to receive any stories from the Group.

The Group suggested stories on individuals who stayed in Paris after the war, divorce cases, medical enquiry stories and complaints of soldiers.

The events for August/September 2018 are to be finalised and announced in the New Year and will include:

- A public lecture in October 2018 with a well-known historian
- An open evening of talks on 9 November
- A media and social media campaign
- A programme of on-site activity
- Author events to be called “Writing war, writing peace”
- Time Travel Club children’s activities
- Refresh of the blog “My Tommy’s War” – possibly to include readers at TNA
- Autumn conference with independent historians and scholars

2.2 CB suggested some contacts for JC to contact

2.3 JK expressed concern that, in general, blog content may be lost. JC replied that there had been a shift in web archival practice to recognise this problem and actively capture content (e.g. the British Library is proactive in website capture).
3 Archives Revealed update – Kate Wheeler, Head of Programmes and Policy, ASD

3.1 The new Archives Revealed campaign had been launched the previous month, with the first workshop being held at the "Discovering Collections, Discovering Communities" conference in Salford 27 – 29 November.

3.2 The National Cataloguing Grants programme for archives that TNA ran with the Pilgrim Trust for 11 years was reviewed in 2016. The interviews, surveys and consultations revealed that the need for cataloguing funding remains: in fact the need was greater than ever. The greatest concern of many archives is that their backlog is growing. TNA took this message on board and, as a cataloguing grant is often the first fund an archive applies for, looked for ways to make the application process easier.

3.3 There is new guidance on the TNA website. It asks archives to think about what makes their collection unique, balanced with how it is used, which is a challenge for most archives to meet.

3.4 CB observed that in many cases the archives that need the most support are those whose collections need re-cataloguing because they are wrongly described. KW replied that this need was being met with the launch in February 2018 of scoping grants of up to £3k, which will allow archives to employ a consultant to advise on what is needed. TNA is excited about the potential of these scoping grants.

3.5 CB asked if a scoping grant could be used to decide if a collection has commercial value. KW replied that the terms of the grant are clear that it is not to be used to realise financial benefit. A collection must remain in the archives' possession for a minimum number of years.

4. Diverse Histories update – Vicky Iglikowski – Records Specialist, Diverse Histories

4.1 There are several strands of diverse history that TNA records can shed light on – women, BAME, LGBTQ, and mental health.

4.2 Onsite is the strongest part of TNA's diversity offer. A recent big theme was LGBT history with several on-site events. "A step forward" commemorating 50 years since the passing of the Sexual Offences Act received press attention.

4.3 Online, some of the diverse histories research guides are in the process of being updated. Work is ongoing in trying to drive people to the content, where often the best way to access it is to use search engines with key words. The education website has a lot of free resource documents on diverse histories.

4.4 Offsite, TNA has collaborated with other institutions, notably with the National Trust on the recreation of the Caravan Club. Tours were run by the NT on the LGBT history of Soho.

4.5 To Answer Angela Graham’s question about TNA marking the Centenary of Women’s Suffrage, Suffrage 100 is coming up with a programme of events in 2018. An online hub of content is being developed; talks, podcasts and blogs looking to involve the local archive sector. In February 2018 there will be a film screening of the film “Suffragettes” and a debate on militancy. TNA is also working on suffrage stories with a community dance organisation.

4.6 CB remarked that it is to be remembered that not all women Suffragettes were violent and not all men had the vote. VI agreed that part of TNA’s plan is to challenge misconceptions around suffrage and get across the national nature of the movement.

4.7 AG commented that the University of East Anglia holds the archives of the Kenny’s and asked if there could be an opportunity to refer to this on the TNA website. VI replied that TNA is open to potential partnerships and would be interested in this. AG and VI will liaise.
5 Tenure periods of UAG delegates, and the relationship between UAG and User Forum

5.1 The period of tenure of UAG delegates was discussed. COS felt that the current group was working well. The agenda was now informed much more by UAG members’. Under the Terms of Reference it was possible for someone to stay beyond the initial four year period. The group discussed how/if they could keep supporting UAG after leaving the group.

GM suggested the creation of another group of former members of UAG that could meet once a year in order to maintain links and useful input. This was discussed and discounted as impractical. JK asked what members thought about passing on their experience to local archives. CB thought the main problem disseminating information to local archives is that they struggle with resources and so are not always in a position to be receptive. However it was agreed that it was important that the UAG members kept in contact with each other outside of UAG.

5.2 COS summarised the discussion by saying that TNA would seek to recruit new members but will stagger that recruitment and introduce an overlap/mentoring system, as well as being flexible to keep people on in the short term, and will hold a workshop in 2018 to examine what is working well and how we can retain and build on this.

5.3 AS related her experience at the recent User Forum where she and TNA had come under verbal attack from some of the attendees who were unhappy with the decision (supported by UAG) to remove the printing facilities from the Reading Room. UAG had been accused of being too close to TNA management. AS proposed that a UAG representative should no longer attend User Forum and/or TNA should consider whether to discontinue User Forum. AS felt that the Forum was not being used as it should and was not a good use of TNA staff time. The UAG delegates supported the proposal that UAG should no longer attend User Forum to provide an update.

COS replied that TNA would consider the feedback as part of wider engagement and feedback activities for Users.

AS said that she would like to know how many compliments TNA gets. COS replied that the recent on-site User Survey showed a satisfaction rate of 94%.

6 Delegate submitted items

6.1 Printing facilities update
See Annex A (ii). HL asked about the ability of the new system to print large files and digitised microfilm. COS assured HL that large files could be sent and stored on the cloud so would not congest email boxes and that data can be downloaded and printed from microfiche.

6.2 Access to State Papers Online via Discovery
See Annex A (iii) for a written answer

6.3 Manorial Documents Register (Cornwall and Durham)
See Annex A (iv) for a written answer

6.4 Manorial Documents Register (corrections and amendments by users)
See Annex A (v) for a written answer

6.4 Advanced Orders
See Annex A (vi) for a written answer

6.5 Future of E179 database
See Annex A (vii) for a written answer

7. **Date for 2018 meetings**

Dates suggested for 2018 meetings
Tuesday 6\textsuperscript{th} March
Tuesday 5\textsuperscript{th} June
Tuesday 18\textsuperscript{th} September – Induction Day
Tuesday 2\textsuperscript{nd} October
Tuesday 4\textsuperscript{th} December

8. **AOB**

HL asked a question about ways to read text in faded ink. KB suggested he use Photoshop editing to bring up faded ink and take down staining.
UAG Delegate Submitted items – responses

i. Regional Archive Follow up from Jacqui Kirk regarding the guidance for Local Authorities

From Isobel Hunter, Head of Archive Sector Development, written answer:
To clarify: we are not sending the advice packs to the local authority archives. Much of the content is already available and we send them links frequently. This includes guidance on commercial contracts, income generation, spinning out and deaccessioning. The new work is to create a “pack” of guidance aimed at decision makers in local government (senior managers and elected members). It will have our existing relevant guidance at the heart, with a few updates and additions, plus a little extra content specifically focused on this category of decision maker.
We are developing it with the Local Government Association who will disseminate it via their Culture Hub website, alongside some archive case studies to highlight good practice. We hope this will be published before the end of March 2018.
If UAG members are aware of any archives facing challenging circumstances, we will be very pleased if they encourage the archive service to contract us for help and support via their regional manager or our core email address: asd@nationalarchives.gsi.gov.uk

ii. Printing Update (various delegates)

- Those who came to User Forum and received Dave Priest’s presentation understood the rationale for change and accepted the decision
- The London Family History Centre is a separate facility and will continue to offer printing
- The download tool will also be available on the microfilm/fiche scanners
- On-track to remove the equipment 11 December

iii. Access to State Papers Online via Discovery (Kristina)

Issue: access to some online resources is via e-Library, but this is not indicated in Discovery.
Response:
This is a known issue for all the digitised collections accessed via the e-Library. It is fixed technically, but Discovery has to be populated with all the links, which is a very labour-intensive task. The backlog is being worked through, but no finish time has been declared.

iv. Manorial Documents Register – Cornwall and Durham (Kristina)

Response:
TNA are still planning to revise and update the Cornwall and Durham sections of the MDR. We were aware that Cornwall Record Office would be moving from Truro to a new building in Redruth and it was thought that the revision of the Cornish section of the MDR would be best undertaken once this move had been completed. TNA anticipates that all MDR county projects will have been funded by 2019. As we have said previously, the completion dates are still subject to change and we think it is more likely that it will be completed by 2022 now.
v. **Manorial Documents Register – corrections and amendments by users (Kristina)**

**Response:**
Researchers can email MDR with any corrections, amendments or additions at mdr@nationalarchives.gsi.gov.uk. There is also a web page about how to contribute to our resources at [http://www.nationalarchives.gov.uk/archives-sector/advice-and-guidance/managing-your-collection/developing-collections/contributing-to-our-resources/](http://www.nationalarchives.gov.uk/archives-sector/advice-and-guidance/managing-your-collection/developing-collections/contributing-to-our-resources/). The team will look at adding this link to our research guides and to the web page about the Manorial Documents Register to assist researchers.

vi. **Advanced Orders (Kristina)**

Why is Advanced Orders hard to find online, and why wasn’t I told orders placed after 16:00 won’t be available until 10:00?

**Response:**

In terms of ordering in advance while at TNA – there is an option on all of the computer terminal under document ordering called "Order documents for next time" – this links directly to the advance order form.

The advance order form is currently under review with our web-team and we hope to make some quick fix changes early 2018 followed by a larger revision in the next financial year. Among the short term changes is an e-mail response (for those that provide us with a return e-mail address) with a list of the documents that have been requested for a certain day. There is also a confirmation screen after you have successfully placed your order regardless of whether you have provided your e-mail address. This screen asks you to either print or send the confirmation page to yourself as a reminder of the documents that you have ordered.

In the longer term we are considering a system more akin to on-line shopping where a reader can tag or add documents to a wish list and then move them into an order basket for processing.

There are currently four ways to access the advance order service all of which will lead you to this web page, [http://www.nationalarchives.gov.uk/advanceorders/orderform.asp](http://www.nationalarchives.gov.uk/advanceorders/orderform.asp)

Readers access our web site in different ways. Most arrive at a document description via a "Google" search – normally by entering a name or a place. This would take a user to our on-line catalogue "Discovery" Where there is a document listed there are additional buttons that will allow you to perform actions such as advance ordering.

For users that have accessed our web-site by searching for "the national archives" and landing on our home page [http://www.nationalarchives.gov.uk/](http://www.nationalarchives.gov.uk/) there are three other ways to access the advance ordering system.

For those that already have their document references the most logical way is to click on the "Plan your visit button" underneath the Explore banner. This takes you to a page called "visit us". On this page under research there is the option labelled "ordering documents in advance"

In addition to this there is a "search our web-site" entry field on the top right of the home web page. Entering "advance" or "advanced order" will display a list of related terms and the first entry is a link to the advance order page.

The other way to access the advance ordering system is to use the "website A-Z" listing at the bottom of the home page. If you click on "A" it shows "advance ordering as the sixth link down.

There is information on the page that precedes the advance order form detailing timescales:
vii. **E179 Database (Kristina)**

Is the E179 database going to be merged into Discovery, and will this mean a loss of functionality?

Response:

The E179 (Hearth Tax records) database was developed in the late 1990s and the technology behind it is now very old. Maintaining it in its current form is not sustainable in the longer term. It is now very difficult to update the database and we cannot make additions or corrections to it. Accordingly, we have begun to consider the future of the data contained within it.

At the same time, much of E179 is very poorly described within Discovery: of the approximately 31,000 pieces currently listed in Discovery, more than half have no meaningful description and about 18,000 have no date. It therefore makes sense for us to consider how the content of the E179 database might be used to fill these gaps. Thus far, we have been discussing this informally. No formal project has been agreed as yet.

There would be significant challenges involved in incorporating the existing detailed data about the records in E179 into Discovery. The data is very detailed and has a complex structure. Some of the place-name information and contextual information about tax grants does not currently have an obvious 'home' within Discovery and requires further thought.

We have been (and are still in) discussions with members of the last funded academic project board for the Taxation Records family of projects that have contributed to developing our knowledge of E179 records and the database itself over the years. This liaison will ensure that the financial and intellectual investment already made to build the database will be represented in any future work to preserve that data and make it compatible with Discovery.

We cannot promise to maintain every current search feature of the E179 database indefinitely within future digital finding aids and search tools. However, we would aim to provide equivalents for features that are widely used to ensure that researchers' needs for accessing the original records in this series are met as well as they are at present. Any future project to convert a large amount of data from the E179 database into Discovery would involve engaging with researchers who use the database regularly to ensure that we have understood what their needs are.