

# County Record Office

Service delivery plan 2011 / 2012

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

Overview of the service

Warwickshire County Record Office (WCRO) is based in Priory Park, Warwick, where its purpose-built premises provide safe and controlled accommodation for almost 3 miles of archives. The record office was extended in 2002 and now provides services and facilities for up to 80 visitors per day.

The management of the CRO is overseen by Sam Collenette, the Archive Service Manager and the Management Team comprising: Robert Eyre, Senior Archivist, Alaina MacGregor, Special Projects Manager, Laura Pye Heritage Education Manager and Donata Santorini, Senior Conservator. The CRO forms part of Heritage and Cultural Services within the Localities and Community Safety Business Unit of the Communities directorate of Warwickshire County Council.

Planning Process

This service plan arises out of two sessions held with CRO staff in January and February 2010. The first workshop looked at what the essence of the service is and how to preserve it in the face of cuts. The second workshop discussed outward facing priorities.

	<b>Social Focus</b>	<b>Economic Focus</b>	<b>Environment Focus</b>
<b>Service Priorities: Internal</b>	<b>Quality:</b> Collections, Public Service, Partnerships, Learning, Volunteers, Conservation	<b>Communication:</b> Fundraising, Profile, Advocacy, Managing Customer Expectations	<b>Digital Services:</b> Online Shop, Digital Asset Management, Community Website, Ancestry
<b>Service Priorities: External</b>	<b>Health:</b> Heritage Cultural Services Heritage Lottery Fund Exhibition	<b>Skills:</b> Cultural Leadership Network	<b>Community Identity:</b> Partnership HLF projects
<b>Medium Term (2-5 years)</b>	Promote CRO as a platform for community and educational use	Develop diverse income streams	Develop 'Our Warwickshire' community history website
<b>Long Term (5 years)</b>	Facilitate online advance ordering through Calm catalogue	Investigate apprenticeship and internship schemes	Investigate offsetting energy costs through use of solar panels

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

This plan has been divided into service areas to make it easy to use.

- Infrastructure
- Collections and Cataloguing
- Conservation
- Compliance
- Public Service: Searchroom and Online Services
- Outreach, Learning and Volunteers
- Special Projects

The service currently employs 14.9 fte of which 6 are archivists with a post-graduate qualification in Archive Administration. The service employs a professionally qualified conservator. The work of the record office is also supported by a team of 20+ volunteers.

The service welcomes 5,500 visitors and answers nearly 3,000 email and postal and enquiries per year. WCRO's on-line services, resources and information attract over a million web page views per year.<sup>1</sup> While the majority of users are from the Warwickshire area, the service is also used and valued by people all over the world with an interest in Warwickshire's archives and heritage.

WCRO's archive collections date back to the 12<sup>th</sup> century and contain information about all aspects of life and work in Warwickshire. The collections include parish and non-conformist records, records of local courts, hospitals and schools, records of local families and estates, local businesses (including solicitors) as well as those of local community groups and private individuals. Holdings include paper, parchment, photographic, cartographic, microformat and audio-visual media. Increasingly, the service needs to anticipate the acquisition of digital archives.

This year and for the next three years, the CRO, along with all other services in Heritage and Cultural Services, is facing a severe cut to its budget and therefore its capacity. The 30% cut entails the loss of three posts this year. Two posts will be lost through redundancy and one through retirement.

The plan includes reference to work undertaken in partnership with other services within Heritage and Cultural Services.

<sup>1</sup> This figure has reduced from last year because of changes to the County Council ICT system used to count website hits.

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

Statutory responsibilities

The service's functions are governed by a range of statutory provisions, including notably:

Public Records Acts, 1958 and 1967

Local Government (Records) Act, 1962

Local Government Act, 1972 (ss 224-229)

Parochial Registers and Records Measure, 1978 (amended 1992)

Freedom of Information Act, 2000

Warwickshire County Record Office is appointed as a place of deposit for public records outside The National Archives.

Warwickshire County Record Office is recognised by the National Archives: Historic Manuscripts Commission as meeting the *Standard for Record Repositories*, and by the Master of the Rolls as a repository for manorial and tithe documents under the provision of section 144A (7) of the Law of Property Act 1922, and section 36 (2) of the Tithe Act 1936, as amended by section 7 (1) of the Local Government (Records) Act 1962.

Warwickshire County Record Office has been designated by the Bishop of the Diocese of Birmingham as diocesan record office for those Anglican parishes lying within the Diocese of Birmingham and the County of Warwickshire, with the exception of those parishes lying within the City of Birmingham itself, but including those within the Metropolitan Borough of Solihull.

Warwickshire County Record Office has been designated by the Bishop of the Diocese of Coventry as diocesan record office for the Anglican parishes lying within the Diocese of Coventry and the County of Warwickshire.

Warwickshire County Record Office acts as official place of deposit for those Anglican parishes which fall within the Diocese of Gloucester and the County of Warwickshire by arrangement with the Diocese of Gloucester and the diocesan record office, Gloucestershire Record Office.

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

Partners

The work of the record office is supported by the Friends of Warwickshire County Record Office, a registered charity whose aims are to support the work of the County Record Office and to promote the education of the public through the use of historical records

WCRO also works closely with local record creating bodies and local and family history societies to ensure the survival of records of archival significance and to promote awareness of and support for the importance of Warwickshire's archival heritage.

Mission statement and key objectives

The CRO's mission statement is:

Safeguarding, managing and developing Warwickshire's archives so that they can be accessed, interpreted and enjoyed by all those with an interest in Warwickshire's Past and its People.

and in so doing, makes an important contribution to key corporate priority areas through

- providing public access to the records both in their original form and virtually and facilitating their use through on-site and indirect access to trained and qualified staff, finding aids and information resources
- encouraging and making provision for educational use of the service's collections and expertise, raising educational attainment levels amongst younger people and promoting the contribution of archives to lifelong learning to the community in general
- raising awareness of the importance of archives in developing a sense of place and self for communities and individuals, thereby enriching people's lives

A full list of the CRO's objectives is available on request.

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

Customer engagement

The service reaches customers through its site in Priory Park, Warwick, and through a range of on-line services. While the majority of users come from Warwickshire, a significant proportion of users come from elsewhere in the UK and overseas.

The service values customer feedback, and encourages visitors and users to contribute to service development. A visitor satisfaction survey is carried out regularly, and a User Forum convenes twice a year to explore proposals for future development of the service.

The focus for the coming year is to work closely with colleagues in Heritage and Cultural Services to transform our services. A second thread focuses on income generation. The third will continue to develop opportunities for users to access information and services on-line.

Measuring performance

The CRO received a 3-star assessment (in a scale of 1-4) in the 2010 National Archives self-assessment exercise for local authority archive services and despite just missing a 4 star rating, it is in the top thirty of archive services nationally.

The exercise covers all areas of core activity and sets the framework for service improvement plans.

Staffing issues

The service faces unprecedented cuts to its staffing budget. The retirement of Senior Archivist (Collections) in June 2010, led to the need to restructure and a loss of capacity at senior level. It has also been necessary to lose further posts both in the public facing and support service teams. The public service team has lost 50% of its staffing from Spring 2010 to Autumn 2011.

To maintain the current level of opening hours the public service will, from September, no longer produce documents over lunchtime. In addition to this staffing will reduce to two people in the search room. This will mean reduced availability of staff to support users in accessing catalogues, online and microfilm resources. Volunteers are being recruited and trained to support new users who are likely to be most affected by this reduction. The impact of these reductions will be monitored and may result in further changes.

Sam Collenette, Archive Service Manager May 2011

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

<b>Area of activity</b>		<b>Lead Management Team Officer</b>	
<b>Infrastructure</b> – (including Property Management, E-commerce, Digital Asset Management Group)		Sam Collenette, Archive Service Manager	
<b>Reference Code</b>	<b>Headline Actions</b>	<b>Performance Indicators / Key Outcomes / Measures of Success</b>	<b>Lead Officer</b>
CRO 1/1	Embed transformation changes to management, structure and service delivery teams	Transformation plans implemented	SC and CRO Management Team
CRO1/2	Create and implement an e-commerce action plan	E-shopping infrastructure developed with HCS partners	HCS Management Team (SC)
CRO 1/3	Implement Digital Asset Management Action Plan, including CRO-specific actions	Action Plan Priorities Review	Digital Asset Management Team (SC)
CRO 1/4	Create and implement a CRO fundraising / income generation strategy	Address shortfall in existing income targets	AM/SC
CRO 1/5	Develop a partnership project to deliver a community history website for Warwickshire	Ensure good geographical representation Attract partners from heritage, culture, education, community and environmental groups	HCS Management Team (SC)
CRO 1/6	Support the Cultural Leaders Network	<ul style="list-style-type: none"> <li>• establish training and networking opportunities</li> <li>• develop awareness of the work of the record office with new partners</li> </ul>	SC
CRO 1/7	Rationalise the CRO filing systems	Single filing system in place across paper and	CM

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

		electronic systems	
<b>Area of activity</b>		<b>Lead Management Team Officer</b>	
<b>Collections</b> – (including CALM, accessioning, retro-conversion work, cataloguing, finding aid projects, survey work)		Robert Eyre, Senior Archivist Sam Collenette, Archive Service Manager	
<b>Reference Code</b>	<b>Headline Actions</b>	<b>Performance Indicators / Key Outcomes / Measures of Success</b>	<b>Lead Officer</b>
CRO 2/1	Maintain and develop collections week: <ul style="list-style-type: none"> <li>▪ Donated collections</li> <li>▪ Collections with current links e.g. business, organisation etc</li> <li>▪ Collections with strong support for cataloguing from users</li> <li>▪ Difficult collections (production, FOI or other)</li> </ul>	Monthly reports circulated to public and available online	RME/LAC
CRO 2/2	Conclusion of strong room moves	<ul style="list-style-type: none"> <li>▪ Improve document production</li> <li>▪ Improve strong room management</li> </ul>	ALW
CRO 2/3	Retro-conversion of manual finding-aids for inclusion in CALM / Warwickshire's Past Unlocked <ul style="list-style-type: none"> <li>▪ Inclusion of Access2Archives collections on Calm</li> <li>▪ Ongoing work on CR ref collections</li> <li>▪ Ongoing implementation of Place Authority Files</li> </ul>	Number of records added per year to CALM	MB

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

<b>Area of activity continued</b>		<b>Lead Management Team Officer</b>	
<b>Collections</b> – (including CALM, accessioning, retro-conversion work, cataloguing, finding aid projects, survey work)		Robert Eyre, Senior Archivist Sam Collenette, Archive Service Manager	
<b>Reference Code</b>	<b>Headline Actions</b>	<b>Performance Indicators / Key Outcomes / Measures of Success</b>	<b>Lead Officer</b>
CRO2/4	Maintaining and developing CALM to deliver the best access to collections for staff and public	<ul style="list-style-type: none"> <li>▪ Launch CALMVIEW</li> <li>▪ Maintain stats on use and satisfaction of new CALMVIEW online catalogue</li> <li>▪ Critical Friend testing of existing system</li> <li>▪ Ongoing development of staff expertise</li> </ul>	MB
CRO 2/5	Manorial Documents Register Project	Support Project Officer to deliver objectives <ul style="list-style-type: none"> <li>• Improved access to manorial documents</li> <li>• Improved knowledge and awareness of these collections by staff and public</li> <li>• Promote collections, care and use</li> </ul>	AM
CRO 2/6	Partnership projects	Support TNA school log book project Develop strategy to address Warwick Castle catalogue problems	SC SC/AM

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

<b>Area of activity</b>		<b>Lead Management Team Officer</b>	
<b>Conservation</b> – (including preservation, active conservation, strongroom environmental monitoring, delivery of Reprographics service)		Donata Santorini, Senior Conservator Alaina MacGregor, Special Projects and Service Development Manager	
<b>Reference Code</b>	<b>Headline Actions</b>	<b>Performance Indicators / Key Outcomes / Measures of Success</b>	<b>Lead Officer</b>
CRO 3/1	<ul style="list-style-type: none"> <li>• In absence of lead officer, oversee the Conservation Department and offer line management support to Conservation Team</li> <li>• Maintain professional level of collection care and advice</li> </ul>	Regular one to ones with team Continued involvement of team in service planning Conservation support maintained Number of complaints	AM
CRO 3/2	Conservation priorities: <ul style="list-style-type: none"> <li>• Support collections' week activities</li> <li>• Suspension tapes on Ordnance Survey maps</li> <li>• Conservation of evaluation maps</li> <li>• Completion of Album of Known Thieves</li> </ul>	Staff hours spent  Volunteer hours spent  Staff hours spent	RSP/ Volunteers/DS

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

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CRO 3/3	Surrogacy priorities: <ul style="list-style-type: none"> <li>• Ad hoc surrogates to be made to support CRO and Heritage Education activities</li> <li>• Produce a leaflet to raise public awareness of service</li> </ul>	20 hours of work producing surrogates Health exhibition supported Outreach work supported  Leaflet available online and in the searchroom	RSP
CRO 3/4	Preservation priorities: <ul style="list-style-type: none"> <li>• Supporting public service delivery through reactive and planned preservation work</li> <li>• Book-cleaning &amp; Microfilming</li> </ul>	Numbers of books cleaned  Numbers of microfilm produced	RSP/ALW
CRO 3/5	Other activities / income generation <ul style="list-style-type: none"> <li>• Improve sales of conservation in-house shop</li> <li>• Review Conservation Reprographics equipment</li> </ul>	Meet income target for 2011-12	AM

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

<b>Area of activity</b>		<b>Lead Management Team Officer</b>	
<b>Compliance</b> (including Freedom of Information (FOI), Data Protection (DP), Copyright, Data Licensing)		Sam Collenette, Archive Service Manager	
<b>Reference Code</b>	<b>Headline Actions</b>	<b>Performance Indicators / Key Outcomes / Measures of Success</b>	<b>Lead Officer</b>
CRO 4/1	Create an action plan arising from the Gowers review of Copyright and Intellectual Property.	Action Plan created to include copyright information in HCS databases	HCS CM
CRO 4/2	Implement actions arising from the Government Review of the 30 Year Rule and reconcile with FOI requirements <ul style="list-style-type: none"> <li>▪ Review terms and conditions</li> <li>Begin process of contacting public record creators</li> <li>▪ Begin amending public catalogues</li> </ul>	Terms and conditions of deposit reviewed 15 public record creators contacted 20 priority catalogues amended	HCS CM
CRO 4/3	Deliver staff briefings to keep team updated on compliance issues	2 staff briefings delivered	HCS CM
CRO 4/4	Devise a policy and implementation action plan to safeguard HCS intellectual property rights in digital copies made available via the Internet (e.g. watermarking)	Policy and plan created	HCS CM
CRO 4/5	Review all HCS public databases Consider income strategies	Databases reviewed	HCS CM

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LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

<b>Area of activity</b>		<b>Lead Management Team Officer</b>	
<b>Public Service</b> – (including searchroom services, access to primary and secondary sources, volunteers)		Robert Eyre, Senior Archivist	
<b>Reference Code</b>	<b>Headline Actions</b>	<b>Performance Indicators / Key Outcomes / Measures of Success</b>	<b>Lead Officer</b>
CRO 5/1	Provide a good quality service for users within the resources available and by managing the introduction of new fees, rotas and reductions in some service areas.	Customer Satisfaction rating Number of complaints	RME
CRO 5/2	Liase with the Friends of the CRO, User Forum and Volunteers to encourage their support and promotion of the service and to act as critical friends	Number of meetings held Number of joint projects achieved Number of volunteer hours achieved	RME
CRO 5/3	Support heritage bids by local history and community groups that meet CRO priorities	5 projects supported	RME/SC
CRO 5/4	Promote and develop the CRO shop through targeted promotional activities, etc.	Increased shop sales by 10%	RAG
CRO 5/5	Increase capacity of volunteers to support staff in the search room with help for first time users	Increased volunteer availability for searchroom support by 10%	SP
CRO5/6	PST support 3 projects during	3 projects completed	RME/RAG

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LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

	collections weeks		
<b>Area of activity</b>		<b>Lead Management Team Officer</b>	
<b>Outreach and Learning</b> – (including services to schools, community outreach, talks and visits)		Robert Eyre, Senior Archivist	
<b>Reference Code</b>	<b>Headline Actions</b>	<b>Performance Indicators / Key Outcomes / Measures of Success</b>	<b>Lead Officer</b>
CRO 6/1	Pilot two sessions for secondary schools and youth groups <ul style="list-style-type: none"> <li>Local History Detectives</li> <li>Medicine Through Time</li> </ul>	Sessions piloted and evaluated Decision taken to roll out or not	RF
CRO 6/2	Contribute to Outlook and Look Out! Programmes	Number of events run Number of attendees Event evaluation scores	RF
CRO 6/3	Prepare for National Archives led school log books digitisation project	Encourage accessions from schools Explain project to schools and discuss benefits Develop schools workshop using digitised resources	RF/LAC
CRO 6/4	<ul style="list-style-type: none"> <li>Contribute to the Heritage and Cultural service outreach programme Health theme for 2011 and planning for 2012</li> <li>Investigate use of CRO for reminiscence work in partnership with GP surgeries</li> </ul>	User satisfaction scores Number of attendees Event evaluation  Contact made with surgery Project discussed	RME/RF

**SERVICE DELIVERY PLAN 2011/2012  
LOCALITIES AND COMMUNITY SAFETY  
WARWICKSHIRE COUNTY RECORD OFFICE**

<b>Area of activity</b>		<b>Lead Management Team Officer</b>	
<b><u>Special Projects</u></b>		Alaina MacGregor, Special Projects and Service Development Manager	
<b>Reference Code</b>	<b>Headline Actions</b>	<b>Performance Indicators / Key Outcomes / Measures of Success</b>	<b>Lead Officer</b>
CRO 7/1	Royal Pump Room Gardens History Project	Completion of all activities specified within the grant application on time and to budget.	AM/LP
CRO 7/2	Lillington History Project	Provide support and advice to the Lillington History group as agreed and funded through their proposed bid to the Awards for All funding programme, if successful	AM
CRO 7/3	Doreen's Diaries Project	Provide support and advice to the Leek Wootton History group as agreed and funded through their Heritage Lottery Fund application.	AM
CRO 7/4	Ancestry	Lead on the relationship with Ancestry.com Agree a marketing programme for the online launch	AM
CRO 7/5	Identify and evaluate potential funding sources to support collections care and development and public access benefits	Rolling programme based on funding streams available throughout the year	AM
CRO 7/6	Prepare evaluation reports for funders	Evaluation reports written for: Willes Cataloguing Project Book of Known Thieves	AM