Oxfordshire History Centre Forward Plan 2015 – 2018

Function of service

Oxfordshire History Centre provides an archive and local studies service which acts as the corporate and social memory of the county of Oxfordshire, ensuring a legacy for future generations. The Centre houses unique council and court records, church and estate records, business and personal papers, together with a photographic, oral history and video archive, local newspapers, maps, printed books and pamphlets, ephemera and digital content.

The Centre protects, promotes, celebrates and makes accessible the written and pictorial heritage of Oxfordshire for researchers worldwide. Stakeholders include the Centre's customers, local history and family history societies, depositors and donors, the learning community (both formal and informal), museums and related heritage bodies, The National Archives, Arts Council England, the Heritage Lottery Fund, the Diocese of Oxford and Oxford City Council.

The Centre was created in 2011 through the merger of Oxfordshire Record Office, Oxfordshire Studies (from Oxford Central Library), and has made the process of local and family history research easier through the combination of related collections and staff expertise on a single site. Bringing these services together has also avoided unnecessary duplication and established greater clarity on where to access material for historical research.

The Centre works with the Library Service to support the provision of Local and Family History content throughout the county. In particular the Reference, Local and Family History section of Oxford Central Library introduces customers to basic collections of Oxfordshire local and family history sources, and refers them to the advanced collections and greater expertise of Oxfordshire History Centre. The Centre works with the Library Service to increase the impact of Local and Family History across the library network and to raise the profile of the Centre.

Under a contract of 16 October 2012 concluded between Oxfordshire County Council and Oxford Health NHS Foundation Trust and its successors, Oxfordshire History Centre works in partnership to provide office accommodation for the use of Oxfordshire Health Archives staff, strongroom accommodation for the storage of 350 linear metres of Health Archives records, and access to the documents in its searchroom.

Statutory duties and legal obligations

- Oxfordshire County Council is obliged to run an archives service under the Public Records Act (1958) and the Local Government Acts (1962, 1972). These Acts require the care of and provision of public access to public records (records of public bodies, health records and court records), the records of local authorities (county, district and parish councils), and tithe and manorial records. Oxfordshire History Centre is the designated Diocesan Record Office for Oxfordshire under the Parochial Records and Registers Measure (1978), and has an explicit legal agreement with the Diocese to preserve and make available Church records. These ecclesiastical records (parish, archdeaconry and diocesan) represent about 25% of the History Centre's archival holdings. The office has also taken in records deposited or donated by individuals,

organisations, businesses etc. as well as official records, so there is a public expectation that such archives can be safely deposited and accessed here.

- The Council is obliged to run a "comprehensive and efficient" library service under the Public Libraries and Museums Act (1964); this has always been held to include the provision of a professionally managed local studies service.

Standards and trends

This section outlines areas of government policy, together with initiatives in the Library, Museums and Archives sector, which impact on Oxfordshire History Centre's service, and which suggest themes for priority treatment or further development.

After each point are noted actions we are taking to address these requirements.

OHC = Oxfordshire History Centre

General

- Oxfordshire History Centre has been identified and appointed by the Lord Chancellor (under the Public Records Act 1958) as the appropriate repository for holding the public records of Oxfordshire, and is regularly inspected to assess whether it is meeting its obligations.
  - o Archive Service Accreditation (devised in 2012 by the Museums Libraries and Archives Council and The National Archives) is the standard for defining good practice within the sector. It helps archive services to demonstrate their value by externally validating and accrediting achievement and supporting improvement. It enables archive services to review and develop their policies, plans and procedures against a countrywide standard, identifying strengths of the service and providing a framework to improve areas of weakness. OHC will prepare and submit an application to The National Archives to be accredited during 2015.

- The Chartered Institute of Library and Information Professionals (Cilip, formerly the Library Association) is the professional body which provides accreditation for librarians and works to promote good practice and develop skills and excellence throughout its membership.
  - o The *Guidelines* of Cilip's Local Studies Group inform the professional management and exploitation of the local studies collections at OHC – (LA 2002).

- Government policy for archives is promulgated through The National Archives (TNA). TNA has made recommendations supporting the development of better services in partnership, strengthened leadership and a responsive, skilled workforce, a coordinated response to the challenges of managing and making accessible digital information, comprehensive online access of catalogues, and active participation in cultural and learning partnerships promoting a sense of identity and place within the community – (TNA 2009, 2012).
  - o OHC aims to meet these recommendations by (for example) applying for archive service accreditation, working with other local authorities and private organisations on digitisation, cataloguing and other projects, linking to events and venues (such as libraries) with potential to achieve wider impact

- Government policy for libraries is promulgated through Arts Council England (ACE). Among the key outcomes of public libraries are their capacity to "help us understand ourselves, our place in the world, and the heritage of the communities in which we live" – (ACE 2013).
    - Right across its collections, services and ethos, OHC plays a fundamental role in delivering this outcome.

- The Government commissioned the Sieghart independent panel in 2014 to investigate how the public library system could best work in the future, taking into account the sustained and severe financial climate and the rapid pace of change. The Department of Culture, Media and Sport is yet to declare any change in Government policy as a result, but relevant recommendations from the Sieghart report have been incorporated into the sections below on: *Sustainability, Staff Skills* and *Digital Technology.* (Sieghart, 2014).

- The Society of Chief Librarians (SCL, 2014) has promoted four Universal Offers which should be regarded as integral elements of a relevant and accessible public library service: the Health offer, Information offer, Digital offer, and Reading offer. OHC is well placed to support Oxfordshire Library Service in delivering particularly the Digital offer and Information offer.

Partnership and economies of scale

- "There are opportunities to achieve economies of scale and greater impact where museums and libraries innovate in digital media or share assets with partners" – (ACE 2011).
    - The 2011 merger to create OHC, although not a purpose-built enterprise to ideal standards, reflects a national trend for Local Studies, Archives and Museums professionals to work alongside each other, with potential savings to service budgets and better outcomes for customers.

Customers

- OHC's participation in the 2014 CIPFA *Survey of Visitors to UK Archives* (the most recent survey of its type), and in-house data-gathering, show that:
    - While visitor numbers are decreasing (by about 10% in the past year, similar to several other local authority repositories in our region), the average length of stay is almost 3.5 hours, and 20-25% of users are first-time visitors.
    - Enquiries from remote users and website use continue at the levels of the past few years.
    - Comparative statistics with neighbouring, benchmarking counties are difficult to interpret with certainty due to varying nature of the services: for example, Berkshire Record Office is an archive repository only, and the Centre for Buckinghamshire Studies combines a local studies and archives service (like Oxfordshire), but with a separate searchroom for local studies and one for archives users.

- "Differences in people's socio-economic status do not affect their likelihood of using a library; nor does illness or having a disability" – (ACE 2011)
    - OHC will underpin and support the provision of Local and Family History content through the branch library network in Oxfordshire.

- There is an ever growing public appetite and expectation for digital content, delivered in the most convenient ways possible. There is also increasing commercial control of digital content for local and family history.

  - Competition has the potential to diminish OHC's influence over its target market of users. Whether digital content is delivered directly by OHC and its partners, or by alternative suppliers, the result is an accelerating shift towards online delivery and away from personal visits.

- OHC's potential audience includes customers of Local and Family History content across the breadth of the Library Service. The Universal Offers promoted by the Society of Chief Librarians underline how stakeholders and customers require library services to address Health, Reading, Digital and Information needs if they are to remain relevant and accessible; these requirements also impact on the services delivered by OHC. (SCL 2014).

  - The Information Offer focuses largely on life-critical issues, but – with its unique offering of Oxfordshire local and family history resources – OHC can supplement the Library Service's delivery of academic research material under the Access to Research scheme.

  - The Digital Offer emphasises the development of digital services, skills and access as core elements of a 21st century library service. OHC offers extensive specialised content in digital format, together with trained staff who can help customers to access it, thus extending the range and quality of digital services provided by the Library Service, and helping fulfil the purpose of digital technology in making libraries gateways to knowledge.

Collections

- The proper storage of OHC's holdings is required by *PD5454 (2012): Guide for the storage and exhibition of archive materials*.

- The limited representation of locally published material in the British Library's collections, despite its right to automatic legal deposit of printed material has been noted – (BL 2000).

  - The energy and effort of individual local authorities – here, OHC supported by Oxfordshire Library Service – in the coordinated collection and preservation of local publications continues to ensure the security of Oxfordshire's printed heritage.

- The British Library (BL) has the collection of digital content at the heart of its '2020 vision', including liberating access to public-domain content such as historic newspapers through retrospective digitisation, but the BL no longer envisages a cooperative role with local authorities in this task.

  - Since local authorities do not enjoy the same privilege as the BL in the automatic legal deposit of electronic publications, OHC must find its own solutions to preserving vulnerable print collections digitally and for growing its born-digital collections to ensure they are representative of the county of Oxfordshire – (BL 2010).

Digital technology

- "Communities increasingly want to access knowledge and collections online as well as on-site" – (ACE 2011). "Make the most of digital technology and creative media" – (ACE 2013).

- "Comprehensive online access for archive discovery through catalogues and to digitised archive content by citizens at a time and place that suits them" – (TNA recommendation, 2012).

- "Reinvigoration of the library network … starts with a marked increase and improvement in digital technology, rolling Wi-Fi out to every library in the country" – (Sieghart, 2014, p.6).

- Sieghart advocates the creation of a national digital library network, on a socially inclusive 21st century model that is fit for purpose – "reinvigorat[ing] the library offer, reach[ing] new customers, and increas[ing] the visibility of libraries in the community at large" – (Sieghart, 2014, p.13).

- "A national network … would also give users access to reference, specialist collections and local archives as these become available online. It could allow libraries to build stronger links with the National Archives, the British Library, universities and other specialist libraries." – (Sieghart, 2014, p.13).

- "There is a need to develop and have access to high quality content to help inspire and encourage creativity, leisure and engagement across the digital world … The public library space can … give the public access to an unprecedented range of digital content." p.12-13

  - OHC is engaged in projects to digitise and / or publish popular historical sources, in cooperation with local stakeholders or commercial partners, thus widening public access to useful content – e.g. Picture Oxon project to publish 100,000 historic photographs online, parish registers of baptisms, marriages and burials.

  - OHC will take advantage of the Oxfordshire library network to provide wider public access to local and family history digital content at selected sites, seeking a new online solution to manage that provision.

  - As part of the government-supported *Super-Connected Cities* project, OHC is engaged with Oxford City Council to provide a Wi-Fi broadband connection in both its public Searchroom and Reception / Café, from 2015 onwards.

- Despite the rise in digital demand, one in four people (usually older and poorer) still do not use the internet and the digital divide continues to be a reality for them – (Ipsos MORI 2012).

  - OHC will take advantage of the Oxfordshire library network to provide access to local and family history digital content, as well as using commercial online providers.

- "31% of visits to council websites are made on mobile devices" – (Socitm 2014). This includes smartphones and tablets. Oxfordshire County Council's website (in 2014) is optimised for mobile access, making it more effective for users to search or browse. However, OCC's Heritage Search catalogue is not mobile-optimised, and such discrepancy is common between the online catalogues of cultural heritage organisations and their parent body websites.

    o OHC should consider how mobile technology can be used in a sustainable way to improve its users' experience. The improvement of the user experience of Heritage Search could form the first step towards this goal.

Population changes

- Ipsos MORI comments that the UK's population is growing, ageing and becoming more diverse, and so it expects to see from service providers a drive towards localism, co-production and development of new and diverging forms of service delivery – (Ipsos MORI 2012).

    o OHC will constantly review its use of existing resources to meet the challenge of diversity – by working with libraries, external partners, and employing the most appropriate technology.

- "Museums and libraries should continue to innovate in their engagement with people, making more effective use of volunteers. "Museums and libraries continue to play an important role in lifelong learning, particularly for older people" – (ACE 2011).

    o OHC will cultivate and maintain its current band of volunteers, in adding value and capacity to its cataloguing and indexing effort, thus improving public access to collections and providing skills for lifelong learning.

- "Deeper and more innovative opportunities for digital engagement are needed at a personal level for the next creative generation" – (ACE 2011).

    o OHC will continue to increase its impact through the publication of digital content, and through the use of appropriate technologies, including social media, mobile platforms and locational targeting.

Sustainability / adaptability

- "The pace of change in society and individuals requires resilience and adaptability from museums and libraries" – (ACE 2011). "Ensure that libraries are resilient and sustainable" – (ACE 2013)

    o OHC continues to work on streamlining or standardising its systems, reduce unnecessary duplication in its collections, and uses opportunities presented by new technology to improve public access, aid understanding and reduce harm to vulnerable original material.

- "Libraries are among the most valued of civic spaces … and are a gateway to information. Libraries are most likely to be viable when they can demonstrate their value to the widest possible group of users" – (Sieghart, 2014, p.25).

    o OHC can support the 'library offer' in Oxfordshire by improving access to digitised local and family history content in selected local libraries.

Staff skills

- "Deliver the right skills for those who work for libraries" – (ACE 2013)

- Sieghart's ambition is for the promotion of "digital literacy – and in an ideal world – digital fluency … helped by the professionalism and experience of the library workforce … [and] augmented by the recruitment and training of equally high calibre personnel for the future" – (Sieghart, 2014, p.6).

- o Through training and active dialogue OHC can play its part in ensuring that both its own staff and relevant Library Service staff have sufficient knowledge and experience to help customers exploit newly digitised content.

- "Continue to facilitate self-improvement, peer support and share best practice" – (TNA 2009, 2012)

  - o OHC, through the staff appraisal system, supports the continuing professional development of all team members, as librarians, archivists, conservators or as support staff. OHC will offer carefully targeted support to help extend the (local and family history) skills and knowledge of library staff in appropriate service points.

References

- **ACE 2011 =** Arts Council England, *Culture, knowledge and understanding: great museums and libraries for everyone* (2011). This document presents ACE's framework of ambition, revised to reflect its wider responsibilities for museums and libraries.
- **ACE 2013** = Arts Council England, *The library of the future* (2013). This report acknowledges ACE's role in supporting local authorities in their statutory responsibility to provide and fund library services, and it identifies.
- **BL 2000** = *The people's heritage: a new partnership for a national resource: proceedings of a Seminar held at the British Library Conference Centre in London, 13 November 1998* (2000).
- **BL 2010** = *British Library 2020 Vision* (2010). This report presents our national library's prediction of trends and opportunities over a decade and its plan for developing its organisation and its response to users.
- **Ipsos MORI 2012** = *Envisioning the library of the future* (2012).
- **LA 2002** = Library Association Local Studies Group, *Local studies libraries: guidelines for local studies provision in public libraries* (2002).
- **Sieghart 2014** = *Independent library report for England, 18 December 2014* (Dept for Culture, Media & Sport, 2014) [report of an independent advisory panel commissioned by the DCMS and led by William Sieghart].
- **SCL 2014** = Society of Chief Librarians , *Universal offers* (2014) - http://www.goscl.com/universal-offers/about-universal-offers/ ; and: Society of Chief Librarians, *Digital leadership skills – overview. A report by Shared Intelligence, July 2014.*
- **Socitm 2014** = *Better connected 2014* (2014). Socitm's 16th annual survey of all local authority websites.
- **TNA 2009, 2012** = *Archives for the 21st Century* (National Archives, 2009, refreshed 2012).

Oxfordshire County Council's ambitions and values

Oxfordshire County Council's corporate plan for 2015/16 – 2017/18 sets out its vision for a "**Thriving Oxfordshire**," which includes ambitions to achieve:

a) **A Thriving economy** – Oxfordshire History Centre plays a role in supporting cultural tourism in the county, for residents exploring the history of their community, for personal visitors looking for a more fulfilling experience, and for family historians worldwide building connections to their past.

b) **Thriving people and communities** – through the delivery of resources for local and family history research, Oxfordshire History Centre can provide the individuals who use them with a sense of belonging and respect for the community they are investigating. The Centre's local history resources can help members of local communities better understand, appreciate and protect the landscape and environment in which they live, providing the information they need to exercise a more effective role in local democracy. The Centre's use of volunteers in the service encourages active participation from members of local communities and helps keep minds active and skills fresh.

The Council aims to deliver its ambitions by:

- **Meeting the financial challenge**
  Oxfordshire History Centre continues to deliver efficiencies:

  - By merging into a single service Oxfordshire History Centre has already helped to rationalise the Council's assets and continues to deliver a joined-up service across the Archive and Local Studies professions
  - Oxfordshire History Centre, through the merger of separate and partly duplicated services, has become a leaner and more efficient organisation, and continues to place its focus on defining and delivering the core public service.
  - Oxfordshire History Centre is maximising the benefits of new technology, through the procurement of G-Cloud approved digital storage and the creation of increasing amounts of digital content for local and family history.
  - Oxfordshire History Centre continues to pursue ways of working more efficiently – by streamlining processes, by reducing duplication and confusion between Archive and Local Studies collections, and by improving direct citizen access to digitised content.

- **Commission and support partners**

  - With a leaner organisation, the role of stakeholders and partners is increasingly important to Oxfordshire History Centre in helping to achieve its aims.
  - The Centre continues to work jointly with key stakeholders in the planning of services (Oxfordshire Family History Society, Oxfordshire Local History Association).
  - Oxfordshire History Centre collaborates with these commercial and academic partners:
    - Find My Past (digitisation and online publication of wills and probate records)
    - House of Images (online delivery of its photographic archive collections)
    - Oxford University Images (selected online delivery of its photographic archive collections)
    - Bodleian Libraries (contributions to union catalogue for Oxford University's libraries)

- **Enable people and communities to help themselves**
  - o Oxfordshire History Centre will maximise its relationship with Oxfordshire Library Service and use the countywide reach of the branch network to increase the impact of the History Centre.
  - o Oxfordshire History Centre will create and promote digital content to enable more remote online access and encourage more self-help by customers.

CHOICE values

Oxfordshire County Council has adopted these values as underpinning the delivery of all its services:

- **Customer focus** – Oxfordshire History Centre's primary focus is the direct delivery of a research facility to customers both in person and remotely; through the use of technology it is also committed to improve the quality and ease of services delivered remotely.
- **Honesty** – Oxfordshire History Centre encourages customer comments, includes customer suggestions in the planning of services, is happy to explain where particular needs cannot be met, and to apologise and make amends when it gets something wrong.
- **One team** – Oxfordshire History Centre works as one team, encouraging contribution and participation from all its staff and, in accordance with council-wide targets and policies, encourages and develops its staff to perform to the best of their abilities.
- **Innovation** – Oxfordshire History Centre is open to new ways of doing things – staff ideas, customer suggestions, and participation by stakeholders all assist in the constant review of service delivery.
- **Commercial** – Oxfordshire History Centre currently operates or is developing added-value services with three commercial partners which will help improve the range and quality of our online services.
- **Enthusiasm** – Oxfordshire History Centre is committed to channelling its energy into achievable, realistic and customer-focused projects, especially through the expansion of digital resources. It will continue to make best use of staff skills and knowledge and reduced financial resources, while looking for opportunities to improve the experience for customers.

Key objectives for Oxfordshire History Centre
(these are further developed in the Service Priorities below)

1. **Build and maintain collections of archives and local studies material**
   a. Acquire new items or collections in line with established collection policy
   b. Provide a robust and accessible storage system for digital resources
   c. Create and maintain catalogues, indexes, location lists and other finding aids to give access to the content of collections
2. **House and conserve collections of archives and local studies material**
   a. Maintain the building and historic fabric of St Luke's Church so that it is fit for purpose as an operational history centre
   b. Maintain collections in secure strongrooms under approved environmental controls (PD5454)
   c. Intervene to preserve vulnerable collections
3. **Provide customer focused research facility**
   a. Provide an efficient and welcoming Reception area for the use of personal visitors
   b. Provide a comfortable and effective Searchroom for public consultation of unique original material, consultation of digital or online resources, and access to staff help, information and advice
4. **Provide opportunities for remote customers**
   a. Provide an efficient and responsive enquiry and reprographics service to customers unable to visit the Centre in person, exploiting electronic and online facilities for faster interactive transactions
5. **Encourage wider use and understanding of Local and Family History sources held by the service**
   a. Work with stakeholders and partners to improve or enhance the profile of the service and its reputation
   b. Work with Library Service colleagues to explain and promote the role of the History Centre and encourage the graduation of customers from Library to Centre
   c. Employ promotional tools to increase customer use
   d. Extend the reach, impact and accessibility of the service through the provision of wider range of digital and online content
6. **Provide financial, administrative and staffing stability for the service**
   a. Manage, train and encourage staff to perform to the best of their ability
   b. Ensure the finances of the service are robust
   c. Maintain or improve office procedures

Longer term challenges

The following issues may not be fully realised within the term of this plan, but must be considered if the History Centre is to ensure a sustainable future and remain relevant to customers and stakeholders

- The capacity of History Centre strongrooms is sufficient only to take incoming material for approximately 10 years *(OCC Heritage Assets Survey, Jan. 2015)*
- The cataloguing, storage and conservation of Oxford City Archives (largely inaccessible at Oxford Town Hall) and public access to one of the most important archive collections

in the County is the subject of a working partnership with Oxford City Council and other parties.

- New and existing partnerships with all those concerned in the county with the management of archives and local studies material will need to be fostered if an opportunity to improve research facilities and public access to collections is ever to be brought forward.
- The relationship with the Oxfordshire Health Archive will need to be defined and developed in light of staff changes and any potential expansion.

Review of 2014/2015 Service Plan

The History Centre was able to deliver a full service each week during its Tuesday to Saturday opening hours and to maintain the fabric and environmental conditions within the building for safe archive storage and public use.

The service achieved a variety of its aims and obligations during the year:

- Archive collections were received from a range of official and private depositors (over 80 in total) and were all accessioned promptly and packaged and stored appropriately
- Re-organisation of the contents of the strongrooms enabled us to rationalise the storage of our archive collections, for more efficient use of space and document retrieval
- Action plan established for managing merged Local Studies collections and priorities set for bibliographic cataloguing.
- Management of Local Studies bookstock:

    Duplicate material identified and removed; storage simplified.

    Outstore holdings (partially) removed to more suitable and accessible storage.

    Content and presentation of open-access Family History books improved.

- Remnant of (manual) bibliographic card catalogue further reduced and replaced by digital records online.
- New standards and workflow established for scanning and cataloguing photographic materials. Processes rolled out to staff and volunteers and new content produced.
- New photographic catalogue data and digital images prepared and published online through Picture Oxon website.
- Outstore of catalogued but physically vulnerable audio tapes removed to Wessex Film and Sound Archive for safer storage.
- Archive cataloguing: over 8,000 items were catalogued and the catalogues made available on the County Council's website via Heritage Search
- Conservation and preservation: over 700 hours' work was done on a variety of short-term and longer projects, informed by the revised reporting system, used by all staff
- Competitive process completed for the procurement of G-Cloud approved digital storage.
- Health & Safety: the office incident and business continuity plans, risk assessments, and policy documents were reviewed, updated, and tested through staff training sessions.
- Building issues: a maintenance programme for the air handling units was established and monitored
- Reception and Cafe area refurbished, extending the ability of the service to welcome customers.
- Over 4,000 visitors used the service: this figure was lower than anticipated partly due to the office's three-week closure for refurbishment
- 3,500 remote enquiries were answered
- Volunteers: 15 volunteers spent over 1,000 hours working on archive, photographic and document preservation projects
- Oxford City Archives: an archivist from the History Centre was seconded part-time for 9 months to continue listing and cataloguing archive material in the Town hall basement
- Digitisation of Oxfordshire tithe maps completed, affording a reduction in handling of physical originals and better preservation.

- Pilot project completed to provide a solution for preservation of and access to some newspapers, in lieu of microfilming. Project involved the digitisation of selected recent Oxfordshire newspaper content.
- Interactive order forms refined and extended to all reprographic processes.
- Impact of 2014 Copyright legislation assessed and new staff Copyright Manual drafted.
- Closer working relationship established with Oxfordshire Library Service, and Oxford Central Library in particular, to improve the exposure and reach of Oxfordshire History Centre.
- Website content rewritten and published to improve the public face of the service and improve the experience of remote customers.
- Promotional leaflets written and published on popular topics - family history, house history
- Staffing: all appraisals and mid-term reviews were carried out on time and fully documented. All staff were involved in team meetings and in contributing to the development of the service

Service Priorities 2015 - 2018

Priority 1. Build and maintain collections of archives and local studies material
Outcome / Impact: *Relevant collections acquired and made accessible*
Target / measure of achievement: *accessions received, catalogues / records created, closed access listings up to date*

High level action 1.a.
Acquire new items or collections in line with established collection policy

	Task	Measure / target	Timespan / completion
1	Acquire Archive materials	Encourage deposit or donation of a full range of collections to the Centre. Accession new material within 7 days of receipt. Review Acquisition Policy at least annually	Ongoing
2	Acquire Local Studies materials	Select and purchase, or encourage donation of, a full range of collections to the Centre, in accordance with established Acquisition Policy. Accession new material within 7 days of receipt.	Ongoing
3	Acquire electronic publications	Establish nature and extent of electronic publications in Oxfordshire; determine target sources for priority work. Transfer digital material to cloud storage. Identify and select websites for archiving.	Apr 2015 onwards
4	City Conservation Team photographic collections	Continue negotiations to procure photographic collections from City Council. Identify storage and systems for access, cataloguing and digitisation	Apr 2015 onwards

High level action 1.b.
Provide a robust and accessible storage system for digital resources

	Task	Measure / target	Timespan / completion
1	Implement G-cloud storage for digital collections	Implement rollout of access to Preservica cloud storage. Establish structure for data organisation. Arrange transfer of existing data.	Apr 2015 onwards
2	Make digital storage accessible to public on site	Plan and implement design for Preservica public access module. Ensure best-fit with either new-build or existing public PCs	Sep 2015 onwards
3	Investigate extending digital storage to History Centre partners and stakeholders	Consider potential wider use of digital storage and opportunities for partner cooperation and community support.	Sep 2015 onwards

	High level action 1.c. Create and maintain catalogues, indexes, location lists and other finding aids to give access to the content of collections		
	Task	**Measure / target**	**Timespan / completion**
	Catalogue Archive collections	Catalogue at least 5,000 items. Spend 2,500 hours on cataloguing each year. Catalogue a larger volume of material than we accession. Maintain a relevant cataloguing priorities' list, including re-cataloguing projects. Survey and appraise existing uncatalogued collections and de-accession where appropriate Review/update cataloguing manual annually	Ongoing
2	Location list Archive collections	Annual (or more frequent, if necessary) update of archives' location list	Annually
3	CALM cataloguing and accessioning software	Manage the upgrade to CALM v.9.3 in conjunction with the ICT and Information management Services' teams. Oversee the effective working of the system and liaise with Axiell re its maintenance	2015
4	Re-organise Archive collections in strongrooms	Review archive storage space and re-allocate shelving as appropriate	Ongoing
5	Catalogue Local Studies collections	Spend 700 staff hours per year on bibliographic cataloguing. Spend 500 staff and volunteer hours on photographic cataloguing. Catalogue 2000 images.	Ongoing
6	Address bibliographic cataloguing priorities	• Continue conversion of remnant of Oxon Studies card catalogue and create new electronic records • Identify OLIS problems from 2009-2010 retrocon project and amend records. • Continue absorption of required bookstock from Davenport Library inheritance, create new catalogue records; discard duplicate material	Apr 2015 – Mar 2017 Apr 2016 – Mar 2017 Apr 2015 – Mar 2016
7	Review bibliographic cataloguing processes	Identify any weaknesses in OHC's current usage of OLIS (e.g. Analytical, Antiquarian, Serials). Consider choices available. Commission Bodleian Library intervention where appropriate	Apr – Sep 2015
8	Location list Local Studies collections	Annual (or more frequent, if necessary) review and update of Local Studies location list	Annually

9	Reform photographic cataloguing	Maintain new standard for photographic cataloguing and train appropriate staff and volunteers. Roll-out use of HPAC cataloguing software to appropriate staff and volunteers. Extend photographic workflow to include transparency and negative scanning. Promote adoption of standards and workflow by partners. Incorporate use of Preservica cloud storage into workflow for image file creation and storage.	Apr 2015 – Mar 2016
10	Address photographic cataloguing priorities	Catalogue prioritised image collections: • English Heritage listed buildings • Alfred Carpenter, Vale of white Horse • Selected other collections appropriate to volunteer capacity	• Apr 2015 – Mar 2016 • Apr 2015 – Mar 2018 • Ongoing, as capacity allows
11	Catalogue video collections (1)	Establish extent of uncatalogued AYNIE digitised video; make a cataloguing priority. Target uncatalogued DVDs.	Sep 2015 – Apr 2016
12	Catalogue video collections (2)	Enhance and transfer existing video catalogue records from restricted Modes format to MARC21 format	Apr 2016 – Mar 2017
13	Maintain public access to online catalogues	Ensure continued ICT support for Heritage Search and manage any potential transfer to new technology platform. Continue to develop Picture Oxon database and respond to public feedback.	Apr 2015 – Mar 2016
14	Manage photographic / oral history collections storage	Survey collections stored in Strongroom D: identify materials housed in vulnerable storage; enhance and extend Location List to reduce staff time spent searching for materials.	Apr 2015 – Mar 2018
15	Manage Local Studies printed material storage	Location listing and tidying of uncatalogued oversize material.	Apr 2016 – Mar 2017
16	Reduce size of outstore at Library HQ, Holton	Transfer target Holton material to Westgate strongroom. Re-organise Westgate strongroom.	Apr 2015 – Mar 2016
16	Rationalise newspaper storage	Examine extent of duplication of newspaper volumes between OHC and Westgate. Remove post-2010 Newsquest hard-copy newspapers, provided digital surrogate is sufficient	Apr 2015 – Mar 2016

17	Manage BBC Radio Oxford collections	Register interest with British Library's *Save our Sounds* project (to preserve the nation's sound heritage) to raise awareness of the digitisation and cataloguing requirement for 2014 acquisition of BBC Radio Oxford tapes.	Apr 2015 – Mar 2016
		Identify and catalogue 2014 acquisition of Radio Oxford tapes.	Apr 2016 – Mar 2018
		Consider removal of original audio tapes to Wessex Film and Sound Archive after cataloguing and digitisation and supply them with digital files and metadata.	Sep 2017 – Mar 2018

DRAFT

Priority 2. Preserve and conserve collections of archives and local studies material
Outcome / Impact: *Collections preserved and conserved for access and future access*
Target / measure of achievement: *more collections available for consultation*

High level action 2.a.
Manage the preservation of the collections so that activity is focused where most required.

	Task	Measure / target	Timespan / completion
1	Report damaged documents	Staff effectively use spreadsheet for recording items required preservation or conservation work allowing priorities to be clearly identified.	Ongoing
2	Plan for major incidents	Maintain/review office's incident plans and business continuity plans	Annually (at least)

High level action 2.b.
Intervene to preserve vulnerable collections

	Task	Note	Timespan / completion
1	Conserve and preserve archives and local studies materials	Spend 400 hours annually on this work, to be determined by a mixture of the damaged documents' spreadsheet and projects as they arise.	Ongoing
2	Repackage C19th Railway Plans	Create improved packaging created for the plans so that they can more easily be handled.	Apr 2015– Mar 2016

High level action 2.c.
Ensure that collections are stored in the best possible conditions and packaging

	Task	Measure / target	Timespan / completion
1	Maintain strongrooms to professional standards (PD5454)	Create an environmental monitoring system that is independent of the Building Management System to record the conditions in strongrooms.	2015
2	Box, package and rehouse materials	Survey collections to identify those most in need of improved storage	2015
3	Ensure proper packaging of all newly acquired material	As part of accessioning process, new material will not enter strongrooms in inappropriate packaging or condition. Update systems' document for staff	Ongoing Annually

Priority 3. Provide a customer focused research facility
Outcome / Impact: *Delivery of customer-centred service*
Target / measure of achievement: *Number of visitors, length of stay, positive comments on We Ask You forms*

High level action 3.a.
Maintain the building and historic fabric of St Luke's Church so that it is fit for purpose as an operational history centre

	Task	Measure / target	Timespan / completion
1	Ensure the maintenance of air handling units	Emphasise to Carillion and their sub-contractors the importance of environment to the collections, of replacing the obsolete air-handling units, and of a regular maintenance programme	2015 - 2016
2	Report building defects promptly	Liaise with Carillion for works to rectify the building defects to make it a safe place to work and visit.	2015- 2016
3	Organise the cleaning of the premises	Ensure daily, monthly and annual cleaning programme is carried out. Plan for larger cleans when financially practical.	Ongoing
4	Fulfil Health & Safety responsibilities	Carry out regular inspections and keep paperwork up to date, as required	Ongoing

High level action 3.b.
Provide an efficient and welcoming Reception area for the use of personal visitors

	Task	Measure / target	Timespan / completion
1	Run Reception	Supervise Reception area for 39 hours per week, welcoming visitors, providing refreshments and book sales, and monitoring security	Ongoing
2	Mange the café shop	Review and improve what stock is sold and stored, and remove items no longer required	2015-2016
3	Provide Wi-Fi access	As part of the government-supported *Super-Connected Cities* project, provide and maintain a Wi-Fi broadband connection in Reception / Café.	Apr 2015 onwards

High level action 3.c.
Provide a comfortable and effective Searchroom for public consultation of unique original material, consultation of digital or online resources, and access to staff help, information and advice

	Task	Measure / target	Timespan / completion
1	Number of visitors	5,000 visitors, including 1,000 first-timers, to the office	Annually

2	Number of personal enquiries	11,000 enquiries at the Searchroom and Reception desks	Annually
3	Number of items produced from strongrooms	11,000 Archive and Local Studies items retrieved on request for use in the Searchroom	Annually
4	Lighting	Improvements to Searchroom bookshelf lighting, via Carillion	Apr 2015 – Mar 2016
5	Continue to improve Searchroom layout and furniture	Review Searchroom to reflect user requirements and fitness for purpose	Apr 2015 – Mar 2016
6	Provide Wi-Fi access	As part of the government-supported *Super-Connected Cities* project, provide and maintain a Wi-Fi broadband connection in public Searchroom.	Apr 2015 onwards
7	Maintain public computers	Upgrade and maintain currency of existing navigation system for local and family history content on public PCs at OHC and Central Library. Contribute to project to investigate technical requirements for an online solution to deliver local and family history content on public PCs at OHC and Central Library. Ensure current service levels for delivery of digital content are maintained beyond the planned countywide refresh of public PCs.	Apr 2015 - Sep 2015 Apr 2015 – Mar 2016
8	Establish viewing facilities for digital video	Installation of video playback PC and screen for public Searchroom. Provide system for navigating and accessing video content.	Apr 2016 – Mar 2017
9	Establish listening facilities for digital oral history sound files	Provide system for navigating and accessing sound file content in public Searchroom, based on Preservica cloud storage.	Sep 2015 – Mar 2016
10	Adjust Searchroom processes and policies to fit revised copyright legislation	Following June 2014 enactment of copyright law changes, affecting preservation and library / archives regulations: • Complete copyright manual, after taking legal advice. • Train staff and implement changes. Consider wider effects on Local & Family History content in Library Service.	Apr 2015 – Mar 2016

Priority 4. Provide opportunities for remote customers
Outcome / Impact: *Selected services made accessible off-site. Electronic and online facilities exploited for faster interactive transactions*
Target / measure of achievement: *Transactions concluded successfully; customer comments*

High level action 4.a.
Provide an efficient and responsive enquiry and reprographics service to customers unable to visit the Centre in person

	Task	Measure / target	Timespan / completion
1	Provide an efficient remote enquiry service	Answer all letters and e-mails fully within 7 days of receipt. Update systems' document to reflect changes	Ongoing
2	Reply to remote enquiries	Answer 3,500 letters and e-mails each year	Ongoing
3	Refine interactive forms for reprographic and orders	Investigate technical requirements for PDF forms interactivity on tablet and smartphone platforms. Revise forms for any annual revision on charges.	Sep – Dec 2015 Annually, Jan – Feb
4	Adjust reprographic processes and policies to fit revised copyright legislation	Following June 2014 enactment of copyright law changes, affecting preservation and library / archives regulations: • Complete copyright manual, after taking legal advice. • Train staff and implement changes to reprographic processes.	Apr 2015 – Mar 2016
5	Develop access through mobile technology	Investigate opportunities for the application of mobile technology to improve remote users' experience. Investigate options for improvements to Heritage Search as first step towards mobile fluency. *(See also 1.c.13 on maintaining public online catalogue)*	Apr 2015 – Mar 2016

Priority 5. Encourage wider use and understanding of collections held by the service
Outcome / Impact: *Service widely known, used and respected. Productive relationships forged with partners.*
Target / measure of achievement: *Personal visits; Volunteer hours; Number of stakeholders and groups involved; Website hits; Items digitised / published*

High level action 5.a.
Work with stakeholders and partners to improve or enhance the profile of the service and its reputation

	Task	Measure / target	Timespan / completion
1	Work with volunteers	Manage 20 volunteers spending 2,000 hours annually on archive, local studies and conservation projects.	Ongoing
2	Local Studies volunteers	Recruit new volunteers to increase capacity for photographic cataloguing and scanning.	Apr 2015 – Mar 2016
3	Liaise with Oxfordshire Family History Society	Hold quarterly liaison meetings with OFHS. Share OFHS research data output for public consumption at Centre. Provide public helpdesk provided at Centre. Sell OFHS publications at Centre.	Ongoing
4	Liaise with Oxfordshire Local History Association	Hold quarterly liaison meetings with OLHA.	Ongoing
5	Work with Oxford City Council	Continue to liaise with and support archive provision at the Town Hall	Ongoing
6	Work with professional bodies to improve and validate the service	Archives & Records Association Committee work. Six-monthly benchmarking meetings with Berks & Bucks record offices. Contact with Cilip Local Studies Group.	Ongoing
7.	Work with local archive groups	Foster relationships with organisations holding archives, local studies and photographic material, and offer help as appropriate	Ongoing
8.	Work with commercial partners to increase leverage and impact	Maintain working relationship with commercial partners to maximise worldwide access to service: House of Images, Oxford University Images, DC Thomson.	Ongoing

High level action 5.b.
Work with Library Service colleagues to explain and promote the role of the History Centre and encourage the graduation of customers from Library to Centre

	Task	Measure / target	Timespan / completion
1	Support Local and Family History provision in Libraries	Support Local and Family History activity across the library service network	Ongoing

2	Assist with Library service delivery	Involve History Centre in service delivery at Central Library and branches	Ongoing
3	Work with Bicester Library	Assist Library Service with planning of Local and family history resources at new Bicester Library	Apr 2015 – Mar 2017
4	Promote the most appropriate routes for library customer enquiries	Work with Library Service colleagues to revise the Local Studies Manual	Apr 2015 – Mar 2016

	High level action 5.c.		
	Employ promotional tools to increase customer use		
	Task	**Measure / target**	**Timespan / completion**
1	Maintain public website	Promote service and improve customer experience by providing up to date descriptive content on History service and collections	Ongoing
2	Create, review and revise printed service leaflets	Create Picture Oxon leaflet Create Preservation leaflet Review and revise all leaflets	2015 2015 Ongoing
3	Extend reach of service through social media	Establish and maintain OHC Facebook and Twitter accounts, with support from Marketing Unit	Apr 2015 onwards

	High level action 5.d.		
	Extend the reach, impact and accessibility of the service through the provision of wider range of digital and online content		
	Task	**Measure / target**	**Timespan / completion**
1	Parish registers digitisation	Make finished digital files available on-site for public access; review impact.	Feb 2015 onwards
2	District Valuation records digitisation	Make maps and survey books accessible digitally and on OCC website	2015
3	Tithe maps digitisation	Make images available digitally for on-site users and via remote-enquiry service	Apr 2015 – Sep 2015
4	Newspapers digitisation	Secure access to Newsquest's replacement digital archive software, 'Knowledge'. Procure PDF copies of Newsquest published output, as successor to microfilm holdings	Apr 2015 – Mar 2016
5	Wills and probate records digital delivery	Continue commercial relationship with DC Thomson (Findmypast) in provision of Oxfordshire probate records online	Ongoing
6	Photographic images online delivery	Maintain Picture Oxon website with partner House of Images. Create or revise and publish catalogue data and digital images. Add Thomas Photos images.	Ongoing Ongoing Apr-May 2015
7	Photographic digitisation	Maintain volunteer programme to extend access to photographic collections – 1000 items per year • Taunt • Thomas • English Heritage • Carpenter • Selected other collections appropriate to volunteer capacity	Ongoing

8	Oral history digitisation (1)	Continue volunteer programme to digitise vulnerable analogue audio tape – 100 items per year	Ongoing
10	Audit Local Studies digitisation priorities	Review outstanding tasks for digitisation of video and audio collections; establish priorities. Clarify contribution from Wessex Film Archive and All You Need Is Ears.	Sep 2015 – Mar 2016
11	PowerPoint / online exhibitions	Create presentations for use in History Centre 'gallery' and via Council website and social media channels.	Ongoing

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Priority 6. Provide financial, administrative and staffing stability for the service

Outcome / Impact: Service administered efficiently and within OCC rules and guidelines. Staff resource used effectively.

Target / measure of achievement: budget on target; staff performance ; staff skills

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High level action 6.a.
Manage, train and encourage staff to perform to the best of their ability

	Task	Measure / target	Timespan / completion
1	Staff appraisals	Conduct annual appraisals, mid-term reviews and 1:1s in full and within OCC timetables	Ongoing
2	Management Team meetings	Hold monthly meetings of OHC managers to establish and maintain office priorities.	Monthly / quarterly
3	Weekly staff meetings	All staff contribute ideas, share information, and help with decisions	Weekly
4	Staff training	All staff participate in training opportunities, whether in-house, external or self-learning, to enable them to perform to the best of their ability	Ongoing
5	Reports and statistics	Compile monthly, quarterly and annual reports on the service for OCC and national requirements	Ongoing

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High level action 6.b.
Ensure the finances of the service are robust

	Task	Measure / target	Timespan / completion
1	Budget management	Carry out monthly budget profiling, ensure procurement of goods and services follows OCC guidelines	Ongoing
2	Cash handling and banking of income	Carry out cash and banking weekly on a rota basis	Weekly
3	Petty cash processing	Keep thorough records and process claims monthly	Monthly
4	Procurement	Purchase goods and services via SRM or procurement card according to OCC guidelines	Ongoing

High level action 6.c. Maintain or improve office procedures			
	Task	**Measure / target**	**Timespan / completion**
1	Maintain policies and systems	Check or update existing office policy and systems documents at least once a year, and create new ones as required	Ongoing
2	Forward planning	Create and maintain an annual forward plan	Annually in Feb
3	Staff rotas	Create staff rotas for delivery of public service duties	Every two months
4	Use of ICT	Ensure correct use of ICT equipment and services within OCC guidelines, oversee functionality of ICT systems, report issues promptly	Ongoing
5	Feedback from users	Monitor and respond to comments on 'We Ask You' cards and via other channels when asked	Ongoing
6	Filing systems	Review and update the office's hard-copy and electronic filing systems	Annual

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March 2015 (Review date: February 2016)