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Executive summary

Executive summary

The review has come at a time of much change in the national and regional archive scene. We have had an excellent opportunity to consider how to build on our existing partnerships within local government and Berkshire's history communities, knowing that frameworks are being put in place throughout the English regions to provide strategic support for the things we have always wanted to do, but have never been big enough to resource on our own. The next 5 years promise to be an exciting period of many new initiatives.

Into this comes our own Berkshire Record Office, a service of 50 years standing but now effectively a new service to the 6 district authorities created by local government re-organisation in Berkshire. We are proud to work for all 6 authorities and proud also of the superb new building they have provided for the people of Berkshire.

During the review we have asked around – of our visitors, record depositors, our staff, the residents of Reading and our district partners – to find out how satisfied everyone is with our services. We have looked at what possibilities there might be to create new public sector partnerships or work with commercial providers. We have compared ourselves with national performance levels and taken an in-depth look at 4 of our fellow local authority archive providers. We have returned to fundamentals about service provision to challenge whether we are doing the right things to give all our customers what they want, how they want it. We have asked every question we could think of because we were interested to know the answer, and wanted to prove that we are providing an excellent service.

Inevitably there are more improvements we will make than can be listed individually in the improvement plan. What the plan has tried to do is identify broad improvement themes from the messages we have received from our customers and stakeholders – to do more with what we've got; to listen; to build partnerships; and to explore new horizons. It is challenging, as it should be. But it is also achievable, and aims to change our focus from providing onsite access to providing access choices.

There are 3 key elements of the improvement plan which identify the step changes required to improve the service.

- First is developing partnership working between museums, libraries and archives. It is a national agenda which we can embrace, and the next 5 years must see the sector working together to become greater than the sum of its parts. We have a role to play in this.
- Secondly, the goal of electronic access to catalogues of archives and eventually to archives themselves. We must aim to provide access to our collections in whatever form is most convenient for our citizens.
- Last but not least the community must be aware of us. We must reinforce the importance of archives as evidence, for business, leisure, learning or as a way our partners can communicate information. Archives help preserve community identities and give everyone a chance to make discoveries about their surroundings or themselves.

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Berkshire Record Office: who we are and what we do

Berkshire Record Office was created by Berkshire County Council in 1948. In 1998 we became a new joint service for the 6 districts in Berkshire as part of the agreed package of joint arrangements. The service is managed by Reading Borough Council; West Berkshire Council is archive authority responsible for the collections, and also managed the project to build the new Office. The Record Office moved in October 2000 to a new building in Coley Avenue, Reading.



The Local Government Act 1972 section 224 requires principal councils to make *proper arrangements* for their records; this has been interpreted nationally to form a network of offices which exist for all the shire counties of England and Wales and some unitary councils. The DTLR issued guidance on section 224 in 1999 (see www.local-regions.dtlr.gov.uk/section224). We are licensed to hold public, manorial and tithe records and are Diocesan Record Office for the Archdeaconry of Berkshire.

The Office was managed as part of Reading's Museum and Archives Service until October 2001, when it became part of the new Museum, Libraries and Archives Service. We have 21.4 staff (full time equivalent) and the controllable budget for 2001/2002 is £635,159.

Reading Museum and Archives Service's aims (adopted in December 1998) are to

- Stimulate investigative learning
- Acquire documentary material relating to Berkshire
- Reflect the values and priorities of stakeholders and users
- Make its collections available to wider audiences and tackle social exclusion

These aims have been developed within the context of Reading Borough Council's strategic aims and the Arts and Leisure Directorate aims.

The Office's aims (adopted in June 1991) are to

- Acquire documentary material relating to Berkshire
- Provide curatorial care to ensure the preservation of this material
- Provide access to the public and encourage research
- Promote an awareness of the county's past

We achieve these aims through the provision of personal and remote public access; acquisition and cataloguing of archives; conservation repair and microfilming; and outreach and learning support (talks, displays, publications).

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This year we will receive around 9,000 visits and around 13,000 enquiries by post, phone or email. Visitors and enquirers come from all over the world. We have staff to provide services to visitors and enquirers, make lists and catalogues of archives, repair and preserve archives, give talks, and produce displays.



We hold around 4 linear miles of records, or the roughly 60 removal lorry loads required to move them to the new building. We have books bound in parchment, leather and cloth; papers and parchments; maps and plans on various media; photographs; audio and videotapes. Our holdings come from public authorities and institutions in Berkshire; religious and leisure groups; businesses; charities; and families.

For more information see our website at www.berkshirerecordoffice.org.uk.

The Review

Summary of the review

Reading Borough Council decided to undertake the first best value review of the service in 2001/2002 to

- Maximise the benefits of producing and implementing an improvement plan as soon as possible
- Examine the partnership between the Office and the districts
- Consider how the Office will operate and develop in its new home
- Direct the Office's aspirations to the recent *Government Policy on Archives*, and to emerging strategies for the archives sector from Re:source (the new Council for Museums, Archives and Libraries), the National Council on Archives and the Historical Manuscripts Commission (see www.resource.gov.uk)
- Review local performance indicators developed in the early 1990s

The review tested current provision using the 4 Cs – Challenge, Consult, Compare and Compete. Our Best Value review project board managed the review:

Peter Durrant, County Archivist (Chair)

Alec Kennedy, Head of Museums, Libraries and Archives, Reading Borough Council

Yvonne Cope, Head of Libraries, Arts and Information, Slough Borough Council
(representative of Archives Board)

Alan Cross, Chief Accountant, RBC (lead finance officer for joint arrangements)

Chris Hamilton, Head of Libraries and Lifelong Learning, Wokingham Unitary
(representative of Archives Board)

Laura Milner, Arts and Leisure Projects Manager, RBC (project management)

John Painter, Head of Central Administration, RBC ('critical friend')

David Pearson, Reading Museum Service

Mark Stevens, Senior Archivist

Objectives of the review

Value for money: does the Service provide value for money?, can we improve service standards?, and what is the scope for income development or efficiency savings?

Providing choices: how much of the Service is discretionary? What are the areas of choice?, what are the options around them?, and what scope is there for doing things differently?

Serving the stakeholders: does the Service provide what its customers throughout Berkshire (and beyond) want?, are any changes required in the Service's relationship with the districts?, would the Service be managed more efficiently by another district(s)?

Developing access: is the Service making best use of opportunities for remote access through ICT and digitisation?

Promoting learning: how can the Service develop partnerships with the education sector, museums, libraries and other agencies to contribute to the development of a learning culture throughout Berkshire?

Promoting awareness: how can the Service market itself to potential users within the districts and to the public?

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The review also looked at achieving efficiencies in existing working practices and at alternatives for supporting and delivering the various parts of our services. We looked at the effectiveness of existing local performance indicators. We saw the review as providing opportunities both for reflection on how we help our customers and achieve our goals, and for considering how we might develop over the next 5 years.

What we did to explore the objectives of the review

Asset stocktake

Our stocktake is arranged to describe the context to our service – the legislative and political basis, the influences on us, our management structure, premises and finance – before providing an illustrated summary guide to our collections, detailing the curatorial work we do to ensure that archives remain useable now and for future generations, and focussing on how people make use of them and how we help to create access in response to need. It finishes with an initial SWOT analysis of the Office and outlines the review's plans to gather evidence under the heads of the 4Cs.

The Asset stocktake also highlighted the possibilities for cost savings once the new building's plant is operating efficiently. This issue has not been followed up as part of the review, but is an important link to the *Arts and Leisure sustainability report*.

Documents produced by the review

Asset stocktake

Challenge

We produced an initial challenge statement based on our SWOT analysis after a day's brainstorming for the Office management team in April 2001. The SWOT analysis identified the need to challenge

- our links with other services (particularly libraries)
- low public awareness
- collections development
- ICT provision
- office structure
- how to source new skills

The initial challenge statement progressed these ideas to consider fundamentals of service delivery and our operating policies as well as day-to-day procedural questions. It also raised the general issues of how we provided access to the collections and generated income from them. It suggested how we might approach these challenges using information gathering under the other Cs. This was submitted and approved by the Best Value Programme Board.

Part of the statement highlighted 9 areas of Office work which might be challenged. We put staff into teams of 3 to examine each area (everyone was on at least one team and all full time staff were on two) and they looked at the efficiency of present practice. This provided useful feedback which we will incorporate into some of the actions arising from the improvement plan.

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Key findings from our challenge activities

A second stage challenge was held in December 2001, involving the Review Project Board and chaired by Steven Jones from the Public Record Office. This looked in detail at what improvements the Office could make to its services. This challenge concluded that we could improve

- Income generation
- The Office structure
- Partnership working with museums and libraries and the districts to raise awareness
- Our consultation with stakeholders
- Access to our collections, principally through online development with a secondary challenge to access to the building through opening hours
- Learning support in partnership with museums and libraries.

We should also

- Challenge the productivity of professional archivists and conservators
- Continuously challenge our visitors' satisfaction with the service.

A revised challenge statement was produced in January 2002.

Documents produced by the review

Initial challenge statement
Challenge team meetings reports
Revised challenge statement

Consultation

Visitors

We undertook the following consultation with visitors

- The Public Services Quality Group of the Institute of Public Finance Survey of Visitors to British Archives February 2001 (a national satisfaction survey; for more information see www.pro.gov.uk/archives/psqg)
- Focus group for visitors conducted by Bostock Marketing Group September 2001. This looked specifically at visitor satisfaction, perceptions of the Office, improving access and service developments generally
- Questionnaire survey of visitors to Heritage Open Day 8 September 2001. A brief survey to indicate awareness of the Office and suggestions for raising awareness.

Depositors

We held a focus group for depositors conducted by Bostock Marketing Group in September 2001. This considered depositors satisfaction with our services, how they see us making use of their archives, developing access, and awareness and promotion.

Staff

We held two focus groups for staff conducted by staff from Reading Museum Service in October 2001, based on the 6 objectives of the review. We followed this up with an anonymous questionnaire to score our performance and consider visitor services and promotion which was written by Record Office management and collated by a Policy Officer from Reading Borough Council.

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The districts (including libraries and museums)

We held 2 meetings of Archive Board during the review, which has allowed senior officers in each district to discuss the review. Officers on the board represent library, museum and countryside portfolios. In addition, two members of the Board sit on our Best Value review project board. Our critical friends on the review board work in central administration. District members and officers were also represented at the Standing Conference on Archives held in December 2001.

Members and local societies

We held a Standing Conference on Archives in December 2001. Members from West Berkshire and Wokingham attended, together with representatives from Berkshire Family History Society, Berkshire Local History Association, Berkshire Record Society, Reading University and the Diocese of Oxford. Standing Conference considered external funding, consultation, ICT access, collections and audience development, and promoting learning; themes which had developed during other other consultation activities.

Non-users

We added a number of questions to the Reading Borough Council residents and business surveys conducted in summer 2001. These concerned awareness and options for promoting the service and encouraging use. In agreement with Archives Board we did not consult with non-users outside Reading, but have used this consultation with Reading residents as a pilot for further consultation across the districts in subsequent years.

56% of people completing the Heritage Open Day questionnaire were non-users.

Key findings from our consultation activities

- We achieved high levels of satisfaction from visitors, significantly above national averages. 97% rated our service overall as excellent/good, and 100% thought our staff were friendly, helpful and knowledgeable. Our lowest excellent/good satisfaction scores were visitor facilities (74%), opening hours (87%) and copying services (90%)
- 80% of visitors come as 'a learning experience', while 66% viewed their visit as a 'source of leisure enjoyment and personal satisfaction'
- 85% of visitors thought our principal contribution to society is preservation of our culture, while 69% thought it is providing opportunities for learning
- 88% of visitors are over 45, and 99.6% of them are white. 18% have no qualifications
- 96% thought the written and recorded heritage should be supported through public funding
- The visitors focus group also expressed high satisfaction with the service. Visitors also picked up on visitor facilities, opening hours and copying services as areas which could be improved, and were very keen to see access developed online
- Depositors are very satisfied with our services. They are enthusiastic to see online access developed and also for educational use of their archives. They feel awareness of the service could be improved. They were concerned with the idea of contracting out services
- 10% of Reading residents had visited the Office. 80% could not identify any promotional activity which would encourage them to visit. Only 13% said they were not aware of the service, though 73% could not identify it as a council service. Residents indicated they would like to hear more about us in the media

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- Staff would like Office structure clarified, and also to promote the service to the districts and develop online access and support for learners. Opening hours was raised for access development. There is a consensus that we could do better at professional activities such as cataloguing, conservation and outreach. Staff believe we would do best to promote ourselves through media work and open days. They say we offer good services for the elderly and women but could do more for ethnic groups and the young.
- Members and officers from the districts would like us to improve our consultation, develop online access and use partnerships or external funding to develop the service.

Documents produced by the review

PSQG 2001 survey report
PSQG consultation summary (internal)
BMG focus groups report
Open Day questionnaire analysis
Staff focus group reports
Staff survey summary
RBC Arts and Leisure residents survey 2001
Reading Business Survey 2001
Standing Conference on Archives meeting minutes
Consultation team report

Comparison

There are no national performance indicators for Record Offices. Instead we created rankings for ourselves based on the CIPFA Archive Service Statistics. We have also been able to statistically compare ourselves against national and regional performance through the PSQG survey. Additionally we made detailed visits to 4 similar service providers.

CIPFA Archive Service Statistics

CIPFA rankings have been taken for the 35 English shire counties listed with us in the statistics. The CIPFA statistics give resource and output totals under various headings to do with staffing, holdings, use and budget.

PSQG survey of visitors to British Archives

31 countywide services participated in this survey, together with virtually all the unitary or metropolitan borough services and some specialist offices (such as the BBC Written Archives at Caversham Park). This comparison therefore includes a wider range of services than the CIPFA statistics. We also paid for a comparison of our service against the other 8 county record offices in the South East. The survey measured visitors' satisfaction with our services.

Visits to similar service providers

We undertook visits to 4 other service providers. These were all other 'county' services. The rationale for our choice was as follows:

- Buckinghamshire Record Office, as part of a Thames Valley sub region
- Oxfordshire Record Office, as part of a Thames Valley sub region
- Dorset Record Office, as an office of similar staff and visitor size governed by a joint arrangement
- Hampshire Record Office, as a larger service provider with higher use and greater resources

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The visits were undertaken with a comprehensive brief which covered issues raised in the initial challenge statement and the asset stocktake. In addition to a common set of questions we spent some of each visit examining ICT use (Buckinghamshire), visitor services (Oxfordshire), accessioning and cataloguing (Dorset) and conservation (Hampshire). All Best Value board members and senior managers in the Office were invited to take part in visits.

Key findings from our comparison activities

- The CIPFA comparison showed we are in the lower middle quartile for budget per 1000 population and lower middle quartile for staff resources
- We are in CIPFA's upper quartile for professional archivists and conservators
- We were in the lower quartile for virtually all CIPFA customer use statistics but we were closed for our move for half the comparison year
- We are in the lower quartile for opening hours
- We are in the PSQG top quartile for visitor satisfaction with film/fiche facilities and slightly short of it for customer care and visitor facilities. We fall short of the top quartile in 11 of 15 measures
- We score higher than the PSQG national average for almost all visitor services, and are middle ranked in the south east region
- We found our comparison providers in advance of us in ICT development and bidding for external funding.

Documents produced by the review

CIPFA Archive Service statistics 2000/2001
CIPFA statistics comparison (internal)
PSQG 2001 survey report
PSQG comparison summary (internal)
Reports from visits to other providers
Comparison team report

Competition

The Project board established a competition team led by Jan Booth, Records Manager, and part of the Office's management team. The Board's representative on this team was Alec Kennedy.

We could not identify a like-for-like competitor to measure ourselves against directly, and no other local authority Record Office has been entirely contracted out. So rather than consider externalising the service we took a different approach, looking at current methods of service delivery across the Office and questioning their performance. We then looked at alternative methods including new ways of working, co-working with others and commercial options. We considered whether these alternatives might deliver our services better, more efficiently or increase their value.

We gathered information from commercial providers where they exist for parts of the service – document storage, microfilming, and conservation. The results of this exercise are summarised in the *options for service delivery*.

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Key findings from our competition activities

- An internal restructuring will give us the opportunity to improve
- We are a partnership service for the 6 district councils in Berkshire. We should build on this to create further partnerships
- We should consider trust status for the service
- There are no cost benefits to contracting out the microfilming or storage elements of the service but it may be worth further investigation of the costs of out-sourcing document repair work.

Options for delivery

These recommendations are dealt with in the *options for service delivery* paper. In summary, the recommended option for the future delivery of the service is to

- **Retain in-house but restructure the service to allow the team to meet the targets set out in the improvement plan.**

Documents produced by the review

Competition and BRO – commercial providers summary

Competition team report

Options for service delivery

How we will improve our service

The improvements we will make over the next 5 years are grouped below under 4 themes:

- Doing more with what we've got
- Listening
- Building partnerships
- New horizons

The first outline of this plan aimed to theme our improvements by the 6 objectives of the review. But the evidence gathered in the review suggested 4 improvement messages from our customers and other stakeholders if we wished to meet our objectives – that we should continuously look to being creative with our resources to focus on demand; that we must listen to understand what that demand is; that we recognise that we can often achieve more by working with other agencies; and that we think beyond what we know to change the current ways we provide our services.

The text below gives details of the 16 key actions we are planning to improve the service. Some actions can sit under more than one of the 4 themes. Each action and key outcome is also listed in the implementation grid at the end of this document, with summaries of targets and milestones.

Some of the actions are aspirational and are indicated as such. We will seek funding for these actions. We will propose a framework for making bids for external funding and for seeking requests for additional funding from our partners.

Doing more with what we've got

1 Income generation targets

Meets review objectives:	Key outcomes:
Value for money	Income raised to at least 3% of controllable budget within 3 years
	Implement plan for income generation up to 7% of controllable budget

Our visits to other service providers highlighted the fact that we raise a comparatively low percentage of our controllable budget (1.7%) from income than other Offices. Figures varied, and depend to a certain extent on local factors, but we found a range of between 2.75%-7%. We plan to increase our income over the next 5 years.

We will look to raise our income level to 3% of budget by year 3 of the improvement plan. We will do this by promoting and developing existing services, such as copying, research and sales. We will be able to do this with existing resources for visitor and enquiry services. There are existing opportunities which we can exploit, such as customer demand for digital copies and interest from potential sales partners such as Berkshire Family History Society. We will also work with Reading's Museums and Libraries to make use of their retail and marketing skills.

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In year 4 we will review possibilities to extend the income level target to the best performance we identified of 7%. The outcome will be the production of a business plan for income generation. To achieve a 7% target we will have to develop new income streams, which may not be mainstream and will have implications for other areas of Office work. We would look to be able to divert resources to these through efficiency gains made by other aspects of the improvement plan.

Raising income to 3% of controllable budget would make a cost saving of 1.3%.
Raising income to 7% of controllable budget would make a cost saving of 5.3%.

See: *implementation grid 1.1, 1.2*

2 Reviewing working practices, office structure and balance of staff deployment

Meets review objectives: Value for money Providing choices Developing access	Key outcomes: Complete staff restructuring Review policies and standards Rewrite procedures manual Implement and develop training plan
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The challenge process, CIPFA comparison, comparison visits and staff consultation all questioned our staffing structure and raised alternative internal structures which could improve our efficiency. The balance of staff and their roles in the Office has not been fundamentally reviewed since 1991/1992. The challenge process also identified the need to adhere to our rolling programme of policy review, and the need to update the staff procedures manual since the move to the new building. Increasing staff skills is an action point in the *Arts and Leisure sustainability report*.

We will review our staff deployment and procedures with a view to increasing the quality of our output as well as attempting to target resources more efficiently. Within year 1 we will make some alterations to the Office structure to clarify the responsibility for day-to-day operations management and business support and also to reflect the growth in customer use of the service. These alterations will be made through substituting new posts for some posts currently vacant. These changes can be effected immediately. We will also review job descriptions for other posts which do not deliver a direct public service as they become vacant.

We will review our policies on a rolling programme over the 5 years of the review. Each policy has a review date and we will review them in this order unless there are reasons to do otherwise.

We will identify key areas of the procedures manual to rewrite within year 1 and update them before the end of the year. Alternative practices offered by our comparison providers will inform the new manual. We will complete the rewriting of the whole manual by the end of year 3. We will also develop a staff training plan based on the manual with links for improving knowledge, skills and awareness. The plan will be written and implemented in year 1 and developed in subsequent years with the rewriting of the manual.

See: *implementation grid 2.1, 2.2, 2.3, 2.4*

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3 Developing benchmarking and performance indicators for the service

Meets review objectives: Value for money Serving the stakeholders	Key outcomes: Update statistics and local PIs to reflect national/local needs Develop benchmarking with Buckinghamshire and Oxfordshire
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There are no national performance indicators for Record Offices, and only rudimentary benchmarking through the CIPFA returns. The *Arts and Leisure race equality audit* and our in-house disability audit also found that we do not monitor take-up of non-visitor services. We recognise that national drivers will dictate these issues, but our review has highlighted a local need to improve our accountability and targets for service delivery.

We will review our in-house statistics and performance indicators. We will do this in year 1 of the improvement plan. We will also build on the embryonic Thames Valley Record Offices benchmarking group (ourselves, Buckinghamshire and Oxfordshire) to develop sub-regional benchmarks by the end of year 1 which will aid comparison between similar providers. If national indicators become available we will adopt them.

See: *implementation grid 3.1, 3.2*

4 Balancing front and back of house activities

Meets review objectives: Value for money Providing choices Developing access	Key outcomes: Monitor balance annually Produce cataloguing and conservation strategies
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The asset stocktake, challenge process, competition process and consultation with visitors, depositors, the districts and staff all articulated the issue of how we should be using our professional staff time. This is particularly true of the unique skills we have for identifying archives, caring for them and interpreting them. We need to balance this with resourcing promotion, social inclusion and formal learning.

Our consultation was often contradictory on how we should address this issue, although some common ground can be identified. It was felt that

- We have unique skills we can exploit.
- We should look to partnerships to help us meet national policy initiatives and promote ourselves (*see: 7, broadening our public image; 11, using external funding and/or partnerships for service development*).
- We should consider staff deployment (*see: 2, reviewing working practices*).
- What our customers want should drive what our professional archivists and conservation staff provide. We will continuously monitor this throughout the 5 years of the improvement plan to ensure we reflect our customers' needs. We will ensure this is reflected in the consultation strategy (*see: 9, consulting to inform our choices*).

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Based on this evidence we will use our in-house skills predominantly for providing curatorial care and direct access to archives, while building partnerships to bring in skills in marketing, learning and community work. We will also develop closer ties with museums and libraries (*see: 5, promoting the informal learning experience; 13, increasing access and widening participation, and 16, supporting formal learning*).

We will consider ways of allowing greater access to specialist skills by reviewing staff roles and responsibilities (*see: 2, reviewing working practices*). We will also review our conservation and preservation work in the light of the districts' concerns about its present resourcing.

We will look immediately to develop resources through external funding and partnerships to further reduce the backlog of behind the scenes work (*see: 11, using external funding and/or partnerships for service development*). We will write strategic policies for cataloguing and conservation by the end of year 2 based on cataloguing and conservation survey work, which will identify priorities for funding. We will target funds at priority items and collections, while continuing to reduce the backlog in-house as at present. We will continue to monitor the backlog through monthly statistics, and apply our acquisitions policy to select only what we ought to keep. We will refine this in the light of consultation as mentioned above.

Survey work can be undertaken without affecting current plans to reduce the backlog of cataloguing and conservation work.

See: implementation grid 4.1, 4.2

5 Promoting the informal learning experience

Meets review objectives: Developing access Promoting learning	Key outcomes: Produce policy on informal learning support Market and deliver informal learning support
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The challenge process and consultation with our visitors and staff underlined the fact that all our customers are learning, and that the vast majority of them are informal learners. The *Arts and Leisure sustainability report* also highlighted learning as a skills opportunity provided by the service.

We want to clarify what we currently provide to support informal learning, and what we might be able to target from other existing activities. We consider indirectly learning support in part in our outreach policy, but this was written as a promotional rather than a learning policy. We will revisit this in year 1 and address it in a new policy document which we will write early in year 2. We will then identify partners who can help us market what we provide in year 3 and beyond.

See: implementation grid 5.1

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6 Using the media

Meets review objectives: Serving the stakeholders Promoting learning Promoting awareness	Key outcomes: Annual target for production of promotional press releases submitted to the media
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We have a section on media activities within our outreach policy. Our consultation on outreach activities indicated that visitors, depositors and non-users all wanted us to place more stories and articles in the media. This is a change of emphasis from current outreach work which has focussed more on talks, visits and displays.

We will change the balance of our outreach resources towards identifying material for press releases. We will issue releases in conjunction with RBC's Marketing and Public Relations Service, who have indicated their ability to place stories in the media across Berkshire. We will set an annual target for promotional press releases submitted to the media from year 1 of the review and monitor it with a quarterly management meeting.

See: implementation grid 6.1

7 Broadening our public image

Meets review objectives: Serving the stakeholders Developing access Promoting awareness	Key outcomes: Raised level of public awareness Review branding Plan programme of events in the districts
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The low awareness of the service was identified in the challenge process, and also from the RBC residents consultation. Consultation with the districts also indicated a desire to review the Office's branding, including the name of the service. The districts also expressed a desire for the Office to be involved in more district events.

We will include elements in each year's service plan which are designed to broaden awareness. These will include work with the media, developing remote access and promoting informal learning (*see: 5, promoting the informal learning experience; 6, using the media; and 14, developing the virtual searchroom*). We will also address marketing through closer working with museums and libraries (*see 13, increasing access and widening participation*). We will also prepare an annual plan to have a regular presence in each of the districts.

The evidence of the review is that awareness is more of an issue than service image. Because of this, and because branding for the Office was changed in 2000, we will wait to review branding until years 4 and 5 of the review.

See: implementation grid 7.1, 7.2

Listening**8 Maintaining high visitor satisfaction levels and working towards top quartile benchmarks****Meets review objectives:**

Serving the stakeholders
Developing access

Key outcomes:

Increase satisfaction in each subsequent PSQG visitor survey
Annual review of at least one element of customer services

The PSQG national survey found very high levels of satisfaction from our visitors. These levels were higher than national averages for archives services, although we scored few results in the top quartile. The findings were consistent with previous surveys and our own customer comments, and show we have improved since the 1999 survey. The survey has identified areas where there is further scope for improvement and we will look to challenge these continuously to increase satisfaction over the next 5 years. In addition, the PSQG and CIPFA comparisons, together with our comparison visits and in-house disability audit, highlighted possible improvements we can make.

We will improve the information available to visitors before they arrive. We will do this through the launch and development of our website. We will improve copying services by encouraging self-service flash-free photography. We will link customer care training to the corporate Customer Care Charter. We will also consult further with disabled customers and about visitor facilities to explore these needs. We also need to look again at issues such as customer response times, research aids, and opening hours (*see: 13, increasing access and widening participation*).

We will commit to reviewing an element of visitor and enquiry services each year over the 5 years of the plan. We will review copying; literature, leaflets and signage; customer care; the website and remote information; and enquiries. We will review copying services in year 1.

See: implementation grid 8.1, 8.2

9 Consulting to inform our choices**Meets review objectives:**

Providing choices
Serving the stakeholders
Promoting awareness

Key outcomes:

Produce strategy for regular cycle of consultation across the districts

The Reading residents and business surveys which we fed questions into conclude that most of the local population know little about us. Consultation amongst visitors and depositors conversely showed that our customer base is knowledgeable and interested to hear from us. If we are to broaden our understanding of customer needs we will have to consult more widely.

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We will produce a consultation strategy in year 1. We will consult in partnership where possible, and use the Reading surveys as a pilot to extend across the districts, so we can build up a picture of awareness and likely use, and evaluate and promote our services. We will invite members of Archives Board to include us in district consultation plans. We will also continue to take part in national consultations as detailed in the *asset stocktake*. We will do this over the course of the 5 years as and when opportunities arise. We will also commit to consulting customers over specific issues, such as opening hours, disabled access and the website.

See: implementation grid: 9.1

10 Developing the relationship with depositors

Meets review objectives: Serving the stakeholders Promoting awareness	Key outcomes: Circulate existing communications to depositors Identify options for creating a friends group
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The focus group for depositors identified high satisfaction with our services but also that we are unsure what our expectations are for our relationship with depositors. Depositors expressed the wish to have a link with the Office beyond the act of transferring records.

We need to establish to what extent existing Office communications such as the annual report, newsletter or website might fulfil the role of providing a link to the Office for depositors. We will do this within year 1 of the review.

We will also investigate options for creating a Friends of the Record Office group, as some of our comparison providers have done. Other providers have found Friends groups assist the relationship with depositors and also help promote and market the service. We will look at options which promote volunteer involvement. We will do this in year 2 of the review and construct a timetable for launch in year 3. We have not identified any resources within the Office to set up a friends group and will need to identify launch costs.

See: implementation grid 10.1, 10.2

Building partnerships**11 Using external funding and/or partnerships for service development**

Meets review objectives:	Key outcomes
Providing choices Serving the stakeholders Developing access Promoting learning Promoting awareness	Preparation of/involvement in funding bids

Both the challenge process and our consultations stressed how partnerships could help us improve our service. Partnership was also a theme in our comparison visits. Use of external funding was raised through our comparison visits and also consultation with visitors and the districts.

We already make use of a number of partnerships – within Reading Borough Council and across the districts, with other Record Offices, with the University of Reading, and with local historical groups. We have recently made 2 bids for external funding; a successful one in partnership to the New Opportunities Fund for £283000 to digitise items relating to agricultural history, and one pending to the British Library for £15000 to catalogue and conserve one of our hospital archives. Both bids include contributory funding which predominantly consists of staff time.

The use of partnerships and external funding to achieve specific outcomes are both key parts of Government archives initiatives. There is a resource commitment in terms of staff time, but by restructuring as suggested we intend to create more time for making bids and managing successful projects (*see: 2, reviewing working practices*). We will do this throughout the 5 year period of the improvement plan as soon as the restructuring is completed. We will begin by managing the New Opportunities Fund project through to completion in 2003.

We will prioritise cataloguing, conservation and ICT/digitisation projects for bids which meet our service aims. We will submit at least one bid a year with matching funding from within existing resources. When matching funding in excess of this is required we will seek additional funding from our partners. It is recognised that if this is not forthcoming such bids will not proceed. We will look to continue our existing partnerships with other public sector and community groups.

See: implementation grid 11.1

12 Establish a framework for the accountability of the service

Meets review objectives:	Key outcomes:
Serving the stakeholders	Finalise joint agreement Review role of Standing Conference on Archives

The asset stocktake highlighted the fact that the agreement for how we should deliver our services to the districts remains incomplete, and that progress on it has

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stalled since 1999. Consultation with the districts has questioned the purpose of Standing Conference on Archives, one of the bodies set up in the draft agreement.

We will pursue the completion of the joint agreement immediately. However, the move to cabinet government in all the districts and the passage of time since 1998 afford an opportunity to review the agreement in detail if the districts so wish. For example we might now include a commitment to a cycle of consultation (*see: 9, consulting to inform our choices*). We will explore these issues with Archives Board.

There are various options for Standing Conference – it might be shaped either as a user group or be given a scrutiny function for members. We will discuss this at the next Archives Board meeting in May 2002, with a view to implementing any decision by the Board in year 2 of the review.

See: implementation grid 12.1, 12.2

New horizons

13 Increasing access and widening participation

Meets review objectives: Value for money Serving the stakeholders Developing access Promoting learning Promoting awareness	Key outcomes: Strategy for closer working with museums and libraries in Berkshire Prepare and implement options to extend/change opening hours
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The PSQG survey and visitor focus group indicated that customers would like us to increase the availability of our services. The CIPFA comparison also indicated that we could do better on various access measures. Making our services available to all is an important contribution we can make to sustainability (*see the Arts and Leisure sustainability report*). Increasing availability of our services may also allow us to increase income and diversify our customer base (*see: 1, income generation; and 15, investigating ways to diversify the customer base*).

We want to challenge how we provide access to our services as well as to the building. We will investigate options for closer working with museums and libraries in Berkshire and at regional and national levels to promote ourselves and develop access. In year 1 we will consider ways that we can provide collections support to the districts' libraries and museums. We will also consult with our district partners to explore ways of delivering our services through libraries and museums as a means of widening access to them. In year 1 and subsequent years we will take part in regional and national opportunities for archives.

Increased opening hours is an aspiration and can only be achieved if additional funding is agreed with our partners. In year 2 we will draw up costed options for changing opening hours, after we have explored options for improving access with museums and libraries. We will consult fully before we change opening hours.

See: implementation grid 13.1, 13.2

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14 Developing the virtual searchroom and providing choices for access

Meets review objectives: Value for money Providing choices Serving the stakeholders Developing access Promoting learning Promoting awareness	Key outcomes: Website ready for e government Implement plan to achieve online access to catalogues
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Virtually every information-gathering exercise for the 4 Cs highlighted this as a significant improvement we could make to our service. Access to catalogues of archives is seen as a much higher priority than access to digitised images of archives. This fits with national policy drivers too.

Our website will be launched in April 2002. We will monitor and develop the website over the 5 years of the plan, both to add information about our collections and to provide online access to our services. We will meet corporate e government targets.

We have purchased an automated catalogue database and will begin using it in year 1 as part of our NOF project and the regional Access to Archives project. We will also cost the conversion of existing catalogues into the database in year 1. We will be able to fund part of the costs of conversion within agreed budget but the remainder will only be achieved if additional funding is agreed. In year 2 we will finalise our plan to achieve online access and implement it immediately. We will aim to achieve online access to all our catalogues through our website by the end of year 5 if additional funding is agreed.

See: implementation grid 14.1, 14.2

15 Investigating ways to diversify the customer base

Meets review objectives: Developing access Promoting learning Promoting awareness	Key outcomes: Produce collections gap analysis Provide resources for collection development
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We make a significant contribution to preserving community identity (see the *Arts and Leisure sustainability report*). However the PSQG survey and visitor focus group indicated that like other Record Offices our visitor base is narrow. Although we are well-used by retired people with a variety of educational backgrounds, we are used comparatively little by those under 25 or from ethnic minority backgrounds.

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We will improve service availability and support for learning (see: 5, *promoting the informal learning experience*; 13, *increasing access and widening participation*; and 16, *supporting formal learning*). We will also establish whether our collections are representative of the community. We will undertake a detailed gap analysis of our collections in years 1-2 of the review. We will target gaps in years 3-5.

See: *implementation grid 15.1*

16 Supporting formal learning

Meets review objectives: Promoting learning Promoting awareness	Key outcomes: Implement plan for supporting formal learning
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The challenge process and consultation with the districts indicated that we could provide further links for education providers. The PSQG survey also identified a small percentage of visitors of school or student age. The *Arts and Leisure sustainability report* also highlighted learning as a skills opportunity provided by the service. The visitors focus group felt strongly that we should expect others to support formal learning.

Although we have found contradictory evidence in the review, the creation of a learning environment is a corporate aim. We have strong links with the University of Reading but not with other education providers.

We will begin a dialogue with the districts' education services, and also with libraries and museums to see how we might support formal education outside the University. We may be able to build partnerships to provide help for teachers and students. We will begin this dialogue in year 2 of the review and produce and implement a plan to support formal learning by the end of year 4.

See: *implementation grid 16.1*

Implementation grid

Vision for the service

To be a centre of excellence in providing opportunities for life long learning through original documents.

Key to aims referred to in implementation grid

Corporate strategic aims

- CSA1** To develop Reading as a Green City with a sustainable environment and economy at the heart of the Thames Valley
CSA2 To promote equality, social inclusion and a safe and healthy environment for all
CSA3 To establish Reading as a learning City and a stimulating and rewarding place to visit

Ways in which we will achieve this

- CSAa** Working in partnership
CSAb Promoting the participation of Reading people in local democracy through effective consultation and communication
CSAc Securing the most effective use of our resources in the delivery of high quality, best value public services

Directorate strategic aims

- DSA1** to contribute to the well being of the people of Reading through the **provision and encouragement of high quality cultural activity**
DSA2 to maximise the potential of cultural activities to contribute towards the **education, and the development of skills, knowledge, and self-expression**, of the people of Reading
DSA3 to encourage the **participation of local people** at all ability levels in cultural activity
DSA4 to contribute towards a **sense of place for Reading and an understanding of the town's past and present** through cultural services and activity
DSA5 to ensure the presentation in Reading of a range of high quality **cultural events of local, regional, national and international significance**
DSA6 to contribute towards the **economic development of Reading and the region** through the provision and encouragement of cultural activities which bring consumer expenditure, employment and investment into the town.

Service strategic aims

- SSA1 Learning Statement** To encourage investigative learning, and to create opportunities for self-directed learning, creativity and research.
SSA2 Guardianship Berkshire Record Office will acquire documentary material, in whatever medium, relating to Berkshire and its people, past and present. It will store, document and conserve the collections for future generations.
SSA3 Access Berkshire Record Office is committed to making its unique collections available to wider audiences, including identified target groups, with the aim of tackling social exclusion.
SSA4 Our Organisation
Our organisation will reflect the values and priorities of our stakeholders and users. We will work towards continuous improvement of the service through individual professional development and team work.

Actions	Commitment year					Link to aims	Targets and milestones	Resource implications	Responsible officer
	1	2	3	4	5				

<u>Doing more with what we've got</u>									
1	Income generation								
1	Raise income to 3% of controllable budget	✓	✓	✓		CSAc	Year 1: income target 2% of controllable budget Year 2: income target 2.5% of controllable budget Year 3: income target 3% of controllable budget	Improved efficiency/ Cost saving	Peter Durrant Alec Kennedy
1.2	Review possibilities for further income generation up to 7% of controllable budget				✓	✓	Maintain 3% target until and write plan to increase Implementation of plan to further increase income by end of year 5.	Developing new income streams will require officer time and may have implications for other activities	Peter Durrant Alec Kennedy
2	Reviewing working practices, office structure and balance of staff deployment					CSAb, c DSA1 SSA4			
2.1	Change staffing structure	✓					End April 2002: complete restructuring plan End May 2002: advertise posts End September 2002: new staff in post.	Improved efficiency	Peter Durrant
2.2	Review policies and standards	✓	✓	✓	✓	✓	Annual rolling programme of review. Policies for review identified each October for inclusion in following year's service plan.	Officer time within current budget	Peter Durrant
2.3	Rewrite procedures manual	✓	✓	✓			End June 2002: identify key sections to rewrite End March 2003: rewrite key sections March 2005: complete new procedures manual.	Officer time within current budget	Peter Durrant
2.4	Produce training plan	✓	✓	✓			End December 2002: produce training plan Plan implemented in conjunction with procedures manual during 2003-2005.	Officer time within current budget	Peter Durrant

Actions	Commitment year					Link to aims	Targets and milestones	Resource implications	Responsible officer
	1	2	3	4	5				

3	Developing benchmarking and performance indicators						CSAb, c DSA1 SSA4		
3.1	Update statistics and local PIs	✓						April 2003: statistics and PI package agreed and in place.	Officer time within current budget Peter Durrant
3.2	Develop benchmarking with Buckinghamshire and Oxfordshire Record Offices	✓						April 2003: production of sub-regional benchmarks pending the adoption of regional/national benchmarks.	Officer time within current budget Peter Durrant
4	Balancing front and back of house activities						CSAb, c DSA1 SSA4		
4.1	Continuous monitoring of balance of work	✓	✓	✓	✓	✓		Reflect in service plans. Build in an annual challenge meeting each September before production of service plan.	Officer time within current budget Peter Durrant
4.2	Produce and implement cataloguing and conservation strategies		✓		✓			End March 2004: complete detailed survey of collections End September 2004: implement policy for targeting the cataloguing and conservation backlogs (see also 11.1).	Officer time within current budget Peter Durrant Sabina Sutherland Sue Hourigan
5	Promote the informal learning experience						CSA2, 3, b DSA1, 2, 3 SSA1		
5.1	Clarify and market support to informal learners	✓	✓		✓	✓		March 2003: year end review of support provided to informal learners End September 2003: produce policy document on informal learning support End March 2004: identify partners to market informal learning support Deliver support and develop marketing years 3-5.	Officer time within current budget. Initial marketing costs estimated at £2000-£3000, which can be met from current budget Mark Stevens

Actions	Commitment year					Link to aims	Targets and milestones	Resource implications	Responsible officer
	1	2	3	4	5				

6	Using the media						CSA2,3, b DSA4 SSA3			
6.1	Implement annual target for press releases submitted	✓						2002/2003 target to produce at least one promotional press release a month Annual target set in service plan for years 2-5, monitored by quarterly meeting.	Officer time within current budget, though has implications for resourcing other outreach activities	Mark Stevens
			✓	✓	✓	✓				
7	Broadening our public image						CSA2, 3, a, b DSA2, 3, 4, 5, 6 SSA3			
7.1	Implement annual plan to raise awareness throughout the districts	✓	✓	✓	✓	✓		As part of each year's service plan we will include targets and milestones to broaden our image. In year 1 we will hold at least one open day, attend at least one family history fair, host at least 4 local history group visits and put on at least 2 exhibitions. We will ensure we have a regular presence in the districts.	Officer time within current budget	Mark Stevens
7.2	Review our branding				✓	✓		Consult with Archives Board in 2005-2006 to implement results of review by March 2007.	Officer time within current budget Rebranding will have cost implications for marketing, signage, stationery etc. Rebranding and the costs associated will be subject to approval by our partner authorities	Peter Durrant Alec Kennedy

Actions	Commitment year					Link to aims	Targets and milestones	Resource implications	Responsible officer
	1	2	3	4	5				

8	Maintaining high visitor satisfaction levels and working towards top quartile benchmarks						CSAb, c DSA1 SSA4	<u>Listening</u> Timetable of surveys not yet known. Survey results to be used as challenge to visitor services throughout years 1-5. Elements to be reviewed include: copying services; literature, leaflets and signage; customer care; the website; enquiries. In year 1 we will review copying services. Timing of other elements will be influenced by PSQG survey results.	Officer time and survey costs within current budget	Mark Stevens
8.1	Increase satisfaction in each subsequent PSQG visitor survey									
8.2	Implement results of annual review of at least one element of customer services	✓	✓	✓	✓	✓			Officer time and supplies within current budget	Mark Stevens
9	Consulting to inform our choices						CSA2, b, c DSA1, 2, 3 SSA4	End March 2003: produce a strategy for a regular cycle of consultation We will have a consultation plan within each year's service plan for years 2-5 We will take part in national consultations for archives.	Uncertain, but we intend to plan a strategy based on agreed budget	Peter Durrant Mark Stevens
9.1	Produce and implement consultation strategy	✓		✓	✓	✓				
10	Developing the relationship with depositors						CSAa, b, c DSA4, 6 SSA2, 4	End September 2002: identify which existing Office communications might provide a link with depositors and circulate them.	Officer time and supplies within current budget	Sabina Sutherland
10.1	Circulate existing communications to depositors	✓								

Actions		Commitment year					Link to aims	Targets and milestones	Resource implications	Responsible officer
		1	2	3	4	5				
10.2	Create a Friends group		✓					End March 2004: investigate options and produce launch plan End December 2004: launch Friends.	Launch costs estimated at £1000-£2000, which will be met from agreed budget or increased income	Mark Stevens
11	Using external funding and/or partnerships for service development						<u>Building partnerships</u>			
						CSA2, 3, a DSA1, 2, 4, 5 SSA1, 3				
11.1	Preparation of/involvement in funding bids	✓					End March 2003: prioritise cataloguing, conservation and ICT/digitisation projects for future bids; complete British Library medical history project (if successful with bid) End December 2003: complete New Opportunities Fund project End September 2004: create revised priority list for bids based on cataloguing and conservation surveys. Years 2-5: make bids as projects become available. Look to partnerships with other public sector and community groups. Follow-up opportunities to achieve our service aims. We will make at least one bid for external funding each year. We will continue to take part in regional and national initiatives for archives such as the Access to Archives project.	Uncertain: each project will need to be costed separately in response to funding criteria and revenue cost implications. Matching funding likely to be between 10%-25% per bid, though some of it may be supplied in kind. Bids could range from £1000-£100,000. We will only proceed with bids subject to approval from Archives Board.	Peter Durrant	
			✓							
				✓						
			✓	✓	✓	✓				
12	Establish a framework for the accountability of the service						CSAb, c DSA1 SSA4			
12.1	Finalise joint agreement	✓						Refer to Chief Executives Group. Timescale may be influenced by factors external to the review.	Officer time within current budget	Peter Durrant Alec Kennedy
12.2	Review role of Standing Conference on Archives	✓	✓					2002/2003: discuss options with Archives Board End December 2003: implement decision.	Officer time within current budget	Peter Durrant Alec Kennedy

Actions	Commitment year					Link to aims	Targets and milestones	Resource implications	Responsible officer
	1	2	3	4	5				

12.3	Investigate trust status			✓	✓		End of March 2006: produce and present an options report on trust status to Archives Board.	Officer time within current budget	Peter Durrant Alec Kennedy
13	Increasing access and widening participation					CSA2, 3, a, c DSA1, 2, 3, 4, 6 SSA1, 3	<p><u>New horizons</u></p> <p>These improvements are partly aspirational and the level of their achievement will probably depend on additional funding being agreed by our partners. We will request additional funding where indicated below. Our priority aims for additional funding are (in order) 14.2; 13.2; 15.1; 16.1</p>		
13.1	Implement action plan for closer working with museums and libraries in Berkshire	✓					End March 2003: complete initial exploration of how we might work closer with the districts' museums and libraries and propose action plan. Initially we will consider how we might provide collections support using our skills. We will also consult with colleagues about how we might deliver our services through museums and libraries or work together to create efficiencies. We will implement decisions in years 2-5.	Collections support can be provided within current budget	Peter Durrant Alec Kennedy
13.2	Prepare options to increase/change opening hours and implement results		✓	✓	✓	✓	End June 2003: prepare options to increase/change opening hours End December 2003: agree costs and submit options to partners for consideration End March 2004: complete agreed options consultation with visitors and other stakeholders April 2004: implement agreed action Increasing opening hours is an aspirational aim.	Estimated annual cost for each extra 4 hours opening: Mon-Fri: £12000 Sat: £18000 Sun: £24000. We will seek additional funding from our partners to increase opening hours, but this plan does not commit partners to additional funding	Peter Durrant Mark Stevens

Actions	Commitment year					Link to aims	Targets and milestones	Resource implications	Responsible officer
	1	2	3	4	5				

14	Developing the virtual searchroom and providing choices for access						CSA1, 2, 3, b, c DSA1, 2, 3, 4, 6 SSA1, 3			
14.1	Monitor and develop the website to comply with e government criteria	✓		✓				End March 2003: complete first year evaluation of website End March 2005: website ready for e government Website reviewed as part of visitor service by end of year 5 (see 8.2).	Officer time within current budget; costs of meeting e government criteria will be based on corporate strategy	Mark Stevens
14.2	Implement plan to achieve online access to catalogues	✓		✓				End December 2002: cost the conversion of existing catalogues into electronic form and finalise plan to achieve online access to all present catalogues by the end of year 5 End December 2003: New Opportunities Fund and Access to Archives project data available electronically in-house and online End March 2004: complete conversion of existing Word catalogues; test system and launch End March 2007: complete data entry of all typed and manuscript catalogues into electronic form (if funding permits) These are aspirational targets for which we will seek additional funding from our partners.	Estimate £63000 to convert existing data (based on similar regional project). Additional software licences and hardware around £10000. Whilst we will be able to progress part of this aim within current budget and through regional or national projects, we will require additional funding to complete it within 5 years. This plan does not commit our partners to that additional funding	Peter Durrant Mark Stevens Sabina Sutherland

Actions	Commitment year					Link to aims	Targets and milestones	Resource implications	Responsible officer
	1	2	3	4	5				

15	Investigating ways to diversify the customer base						CSA2, 3, b DSA2, 3 SSA1, 2, 3			
15.1	Produce collections gap analysis and provide resources for collections development	✓	✓		✓	✓		End March 2004: produce a detailed gap analysis with development options in conjunction with the cataloguing survey (see 4.2) We will target gaps in years 3-5; although the achievement of pro-active collections and audiences development is an aspirational aim for which we will seek additional funding.	Initial gap analysis within current budget. We will target gaps as current budget allows and seek funding for development work. A development post would cost £25000 per annum, though this might be a fixed term post and/or shared with other Record Offices. This plan does not commit our partners to additional funding	Sabina Sutherland

Actions	Commitment year					Link to aims	Targets and milestones	Resource implications	Responsible officer
	1	2	3	4	5				

16	Supporting formal learning						CSA3, a, c DSA2, 3 SSA1		
16.1	Implement plan for supporting formal learning	✓	✓		✓		<p>End March 2005: complete dialogue with education providers</p> <p>End March 2006: produce plan to support formal education.</p> <p>Implementation of the plan is an aspirational aim. We envisage that the plan will require additional funding which we will seek for officer time and also resource preparation costs (document copying, designing and producing, marketing).</p>	<p>Production of plan within current budget. To fund an education post or buy in officer time from another service(s) would cost £25000 pa, though some of this cost could be met through charging for services. Annual resource preparation costs would be around £5000, though some external funding is possible, and selling the product would be a new income stream. We will seek additional funding for formal education support, though this plan does not commit our partners to additional funding</p>	Mark Stevens