



Archive Service Name: Stockport Local Heritage Library

Date of Panel meeting

2018/07/05

Decision on award of accredited status

Provisionally

Provisional approval is awarded for:

1 year

Accreditation number

Each accredited archive service has a unique number identifying their accreditation

2018-26

Panel Narrative

This section records the overall views of the Panel on this application.

The Panel welcomed the strategic support for the service and Stockport Council's recognition of the value of its heritage offer. They were glad to see investment in management of the difficult preservation conditions within the existing premises, and hope that it will be possible to improve conditions based on expert support. It was excellent to see the progress made in getting collections information online, which was a crucial step forward in increasing the discoverability of the service's collections.

The Panel were concerned at the low user base of the archive service, however, and particularly the limited planning to understand and respond to audience needs. They noted the potential for links through library learning activities, as well as museum and heritage connections, and urged the archive service to learn from the proactive work being undertaken by comparable services in the area. The award of Accreditation is provisional for one year to reflect the need for planning and strategy in this critical area, although the Panel recognises that some elements of audience development will take much longer to show progress.

1 Organisational Health

Please assess and comment on how far the applicant service meets each requirement or subrequirement

	Is requirement met?	Commentary on requirement
1.1 Mission Statement	Met	<p>The Archives has a dedicated mission statement which covers the collections and access. Stockport Archives also functions within the context of GMALSP and Greater Manchester strategies and plans, which allow space to point up more specific contributions around community identity, individual potential, and digital development.</p>
1.2 Governance	Met	<p>Stockport Archives are managed as part of the borough's library and information service, sitting within the local heritage library. There is good upward reporting and management support within libraries, recognising the needs of the heritage library and archives as a specific element of library delivery. Libraries are part of the Corporate and Support Services Directorate. Museums and other cultural activities are managed under the Place Directorate, but there has been recent positive cross-working to make links between the two and to secure benefits of heritage activity elsewhere within the council. This has the potential to grow and improve the public service and provide good value for money in the promotion of Stockport's heritage.</p> <p>A vital element of service development and delivery is membership of the Greater Manchester Archives and Local Studies Partnership. This is formally constituted with the support of the authorities concerned and provides a significant level of shared practice, planning and future development across the partnership. It also provides a vital structural link between the local archive services and the Greater Manchester holdings within Archives+. We discussed on the visit the role played by Stockport, which is a positive participant in practitioner and heads of service groups, leading in some development strands. There are multiple layers of networking across Greater Manchester libraries and heritage. Managers at the service understand the value of these in creating long-</p>

		term links among the GM services and support the archivist's active participation.
1.3 Forward planning	Met	<p>Stockport Archives participates in the GMALSP planning process, giving a three-year development framework across the partnership. This addresses both development needs affecting archives across the country (online access, volunteering offer and digital preservation), and some specific needs such as the Manchester-wide lack of suitable expansion space and storage for unique collections. Including these challenges in the collective plan allows the potential to explore joint resolutions to shared challenges.</p> <p>Within the local authority, the Council Plan has a number of areas where heritage can support, particularly in a local sense of place and in democracy and community participation. Although not explicitly linked to the heritage library, it is not difficult to demonstrate connections. There is also a libraries action plan which includes heritage-specific activities and ties the GMALSP development work in to the work of the council, ensuring that the parallel planning processes are well integrated.</p>
1.4 Resources: spaces	Partially met	<p>As is articulated in the GMALSP plan, there is a common lack of suitable storage and particularly expansion space across multiple partners. This is reflected in the plan to undertake a shared procurement exercise, with a framework contract for high quality commercial storage available from February 2019 across the local authorities. This is clearly essential to address the situation in Stockport, where only a small amount of expansion space is available across the library and town hall sites which store archive material.</p> <p>The service is not solely reliant on this approach in the short term, with objectives to review and deaccession material, and some wider library holdings rationalisation underway which will clear space adjacent to current archive storage in the secure basement. In the longer term, an estates review of council properties identifies the town hall and library stores as areas for review. The needs of heritage and libraries with regard to storage mean that there is potential for an offsite store to reduce resource investment in managing</p>

		<p>problematic stores and make a significant improvement in collections' preservation.</p> <p>Digital preservation capacity is part of the GMALSP development workstreams. In the meantime, the service is pragmatically managing digital material when offered, so long as it can be moved from its carrier and backed up effectively. At present only digital images have been donated to the service, but it is recognised that this has to change to continue to reflect the activity of modern Stockport.</p> <p>The Heritage Library is designed to support researchers with ample space and facilities including wifi. The room is spacious and decorated with images from collections and local history. There are a number of display cases and banners to highlight collection treasures and allow flexible display options for the service and community groups. The ground floor of the Library offers alternative spaces suitable for talks, which the Heritage Library makes use of.</p>
1.5 Resources: finance	Met	<p>The archive is entirely core-funded, and can bid for or request items from within the wider library budget. Participation in GMALSP is also a core part of budget agreements. There is limited impetus to develop the service commercially; digitisation partnerships are primarily aimed at improving access. External funding is sought largely through partnership approaches, reflecting the funding landscape and natural connections across GM authorities.</p>
1.6 Resources: workforce	Met	<p>The archives is managed by a professional post (titled Senior Librarian: Heritage and Archives) which also has some effective oversight of the management of the Local History Library as a whole. The job description is at a senior level and clearly requires professional expertise, for example in management of environmental conditions and emergency planning. We discussed on the visit the need for archive-specific expertise within the council, and are confident that this is understood, despite the move to more generic job titles in recent years.</p> <p>The archivist does not manage the staff of the Heritage Library but has significant input into their training and the service in general. A small</p>

		<p>team of regular staff provide the public service, supported by clear procedures and reference material on archives issues. Their expertise in specific areas, including the Spydus archives module, is essential to maintaining an effective public offer to the local heritage collections.</p> <p>Support for the archive service is also part of the GMALSP agreement, which ensures staff based at Archives+ support the wider partnership.</p> <p>Stockport Council supports bids for staff training and development; further training is provided through GMALSP as part of the partnership's training plan.</p> <p>A relatively small number of volunteers support the archive, largely through developing digital access. There is wider GMALSP support for and celebration with volunteers.</p> <p>We saw and discussed on the visit the updated Stockport council documentation on volunteering which is about to be rolled out, pitching 'heritage volunteers' as one opportunity within the library service. Volunteers are recruited through open days, offering an insight into the opportunities available. We also discussed the desirability of continuing to develop the volunteer offer, particularly to offer different roles and opportunities which would attract people with different learning and social needs. This is an aspiration for the service but not currently planned in detail.</p>
<p>Overall view of Organisational Health</p>	<p>Met</p>	<p>The archive service is a small one, but well supported within Stockport Council and libraries. There is clear understanding that capacity is limited and that partnership and collaborative work is needed to make development possible. The challenge of storage, both digital and analogue, is the major issue in this area and requires strategic investment to resolve, whether through the council or the GMALSP.</p>

2 Collections

Please assess and comment on how far the applicant service meets each requirement or subrequirement

	Is requirement met?	Commentary on requirement
2.1 Collections Management	Met	As a small service with one professional post, day to day management is clearly focused. With the GMALSP strategic lead, there is also a clear planning focus which supports the service's future development.
2.2.1 Collections development policy	Met	<p>GMALSP provides an overarching collections policy, which outlines statutory drivers and geographical boundaries of collecting between the constituent authorities. Some common gaps in collecting are identified as priorities across the partnership, and common methods of maintaining contact with major depositors are agreed. This is supplemented and clarified for Stockport with a service-specific approach which dovetails with local studies collecting and sets out the appraisal approach.</p> <p>Transfer of council records is challenging due to a lack of centralised process and staffing. Record transfers are accepted ad hoc as there is no clear retention and disposal schedule ending with the archives. Given limited resources, it is questionable that vital records reflecting the recent history of Stockport Council are reaching the archive for preservation into the future.</p>
2.2.2 Collections development planning	Partially met	<p>Recent accessions show the service regularly acquiring in areas of interest. Stockport is a complex borough with links to three counties, so very different local traditions need to be reflected in collecting.</p> <p>The lack of expansion space and past broad collecting means that current priorities focus on assessing existing collections, limiting the capacity to be proactive. The archivist no longer undertakes public service rota duty, partly to allow sufficient time to undertake reviews of holdings. We discussed on the visit the collections identified for weeding or sampling, and are confident that these are chosen on the basis of professional good practice; in some cases they represent wholesale internal transfers</p>

		<p>or accessions which have never been appraised, and are clearly priorities for review.</p> <p>Past practice means some collections are held with limited depositor information, but clear procedures are now in place.</p>
2.3.1 Collections information policy	Met	<p>GMALSP joint cataloguing guidelines provide a formally-adopted set of agreed minimum standards for documenting collections from the point of accession. This includes prioritisation on the basis of recognised tools, and useful guidance on working with varied software to achieve good descriptive outcomes for archive and local studies collections.</p>
2.3.2 Collections information planning	Partially met	<p>80% of collections are listed to an extent, although the vast majority not to full archive standards. They are nonetheless accessible for readers, and not a priority for recataloguing. Improving the online presence of the collections is the current priority, with newly-acquired software designed to support this in the coming years. The low usage of the service's original records must in part be understood to be due to the lack of detailed description online in an increasingly digital world.</p> <p>The archivist's move away from public duty is also designed to address this major challenge, although the whole Heritage Library team are engaged with retroconversion activity. Now that the cataloguing software (Spydus) is fully installed and tested, it would be helpful to identify targets and milestones in this area to mark progress in such a major piece of work.</p>
2.3.3 Collections information procedures	Met	<p>The cataloguing standard provides full practical guidance on collections information. Accessions procedures specific to Stockport are in place, and staff are trained to use them. The developing cataloguing software allows an integrated approach for accessioning and cataloguing. We saw a demo of Spydus software on the visit, and noted that this works well for hierarchical cataloguing and collections management.</p>
2.4.1 Collections care and conservation policy	Met	<p>There is a current straightforward conservation policy which identifies a largely risk-managed approach to preservation, and work with the conservator at Archives+ for any interventive</p>

		<p>work. This post has just become vacant, which will have an impact on activity for a period. If the vacancy is prolonged, an alternative source of expert conservation support needs to be identified.</p> <p>Some light updating, for example to update references to the closed A2A website, would be useful when this policy is next reviewed.</p>
<p>2.4.2 Collections care and conservation planning</p>	<p>Partially met</p>	<p>There is a plan for largely ongoing preservation tasks, with a useful intention to carry out a PAS to clarify the service baseline (this was intended to be done with the Archives+ conservator and is therefore on hold, but will be taken up). Most analogue records are packaged, and repackaging is underway where required. Dataloggers have been funded to ensure better monitoring of the environment and have now been installed. NCS are also monitoring the environment to support understanding of the different spaces available, and will report with recommendations.</p> <p>One key development area is the GMALSP digital preservation workstream, as at present limited practical preservation is possible and developments need to be at a partnership level. The existing digital preservation documentation is recognised to be outdated and the partnership is planning training and updating of this.</p>
<p>2.4.3 Collections care procedures</p>	<p>Partially met</p>	<p>The application shows a good awareness of risks, and ongoing improvement actions to reduce them as far as possible in the stores. While these are not built to meet preservation standards, the risks are managed and monitored, with links to the adjacent council control centre. One risk not outlined in the application which is of some concern is roof leaks in one area of the town hall store, apparently due to limited maintenance (blocked guttering). This must continue to be monitored and addressed immediately to avoid risk of damage to collections, and requires support from Stockport council's maintenance team. Shelving is not in all cases designed for the archive holdings and some volumes and plans project from shelves.</p> <p>The outstore tends to be too warm and dry for ideal circumstances, with pronounced seasonal drift in RH. The library stack is cooler but with</p>

		higher RH. This does not reach levels which would permit mould growth, according to current recordings. Improving environmental monitoring and interpretation, in the process of being delivered through NCS, will help with understanding the environment further and enable targeted use of heating and/or dehumidification at points.
2.4.4 Disaster and emergency planning	Met	The service has a disaster plan, developed with other heritage functions and regularly reviewed. Some elements of building management were until recently provided through Carillion, which was therefore a key contact. Although the team are poised to update the plan as required, in practice the same staff members and contact details are currently still in place – this will continue to be monitored for when updates are made. The plan has been used for small incidents of water ingress, and a larger library incident not in the collections areas, and has been shown to be effective.
Overall view of Collections	Partially met	The service has some significant legacy issues, primarily pertaining to collections information and care. There has been welcome progress in these, but it is recognised that the service has limited capacity to make significant improvements. Planning is therefore quite brief, particularly with respect to proactive collecting.

3 Stakeholders and their experiences

Please assess and comment on how far the applicant service meets each requirement or subrequirement

	Is requirement met?	Commentary on requirement
3.1 Access policy	Met	As with other policies, Stockport Archives maintains a light-touch policy specific to the service within the context of a more extensive shared GMALSP policy. The latter provides strong guidance on legislation and working assumptions for common record types, ensuring common good practice across the partnership.
3.2.1 Understanding audiences	Partially met	<p>The service uses routine means to discover more about its users, including, and comment cards. Where content is shared via the libraries' social media account, use is also analysed to understand more about the ways a wider audience engages with the content.</p> <p>The service's has limited evidence to explore and explain the very low user numbers for archives, which makes it difficult to analyse or plan to increase. Given the good public facilities on offer in the Heritage Library, it would be good to explore the reasons why engagement has dropped so significantly, which seems out of step with the national picture even allowing for high levels of surrogate material. It could be useful to review ways of capturing user data to ensure that visitors who are directly interested in the unique archive holdings of Stockport or who are using the staff's expertise to further original research through use of surrogate material are recorded more clearly, to demonstrate the value of the public service.</p>
3.2.2 Analysing audience needs	Partially met	The service evidently understands its core user base well, both in terms of demographics and interest areas. The application shows how the service responds directly to user interests and interactions, whether practical improvements to premises or creating content and online service development. Working with community groups to share the display space is a direct means of getting additional participation in the service, broadening audiences while requiring fairly limited input of resources. The Library as a whole also welcomes disability audits.

		<p>There is more limited capacity to analyse and understand the wider user community and how the Heritage Library can reach broader audiences, particularly given very low user numbers for original archives. We discussed on the visit the patchy reception of some outreach activity and the desire to increase digital content as this is recognised to be a growth area. There is limited analysis of what the reasons for successful or unsuccessful audience interactions may be, including the level of audience use of the collections, so there is a risk that future planning may not be based in evidence of need.</p>
<p>3.2.3 Planning to meet audience needs</p>	<p>Partially met</p>	<p>The GMALSP and Stockport development plans both include access elements, and the service has specific plans around the final commemoration of the First World War centenary. A strong sense of the potential audience for these is essential to ensure limited resource is well targeted and effective in raising the service's profile.</p> <p>The major development project to get Stockport content online through the newly-acquired collections management software is another element of improving access to and awareness of collections, and driven by known user need.</p> <p>More broadly, the need to improve the GM Lives portal is acknowledged by the partnership and is the subject of one workstream. Collaborative work on the bicentenary of Peterloo is another identified priority area.</p>
<p>3.3.1 Information on access</p>	<p>Met</p>	<p>Access to the archives is provided via the Local History Library, open over 50 hours per week including evenings and Saturdays. Material outstored can be produced with two days' notice, although the website encourages a longer ordering time. On occasion, in response to customer need and staff availability, this can be reduced. Transfers are made securely by Heritage Library staff, with the help of Town Hall facilities staff for larger loads.</p> <p>The service has been developing its online offer through partnership digitisation with both commercial and local partners. This is largely based thematically, although there are also</p>

		preservation drivers for identifying certain priority series, such as rate books.
3.3.2 Access procedures	Met	The service manages a full range of procedures for routine access to archives. With limited web content, these are largely explained to users as required. The Heritage Library has mixed users, but there is a clear area with priority for archive users, at which reading room rules apply. There are good sightlines here.
3.3.3 A variety of means of access	Met	The service maintains an image archive at present, and is developing content for GM Lives. It contributes some content to Stockport Council social media and undertakes joint projects and displays with partners. The Heritage Library display space provides a regular location for sharing heritage content, whether from the service's collections or local groups and researchers. GMALSP projects such as GM1914 and Made in Greater Manchester provide opportunities to connect across the partnership and to benefit from joint promotional opportunities.
Overall view of Stakeholders and their experiences	Partially met	The service offers a standard level of access including speedy retrieval of records on site and good relationships with analogous services. It would be beneficial to start to consider what the service's future users will expect and how they can be supported, to lay the foundations for future access.

Assessors' Key Findings

A summary of the assessment for Stockport

1	Stockport's archives are well understood by the council and management, who are actively seeking opportunities to grow and partner to increase the impact of this small service and support the borough's rich heritage offer.
2	The current premises are a significant drain on the service, requiring resource investment in management and in reviewing collections to secure sufficient expansion space. If opportunities for rationalising and improving storage spaces in particular become available, this would provide a step change in the service's management.
3	Direct use of the service is very low, and to secure its future the service needs to understand its potential audiences and what it can offer the people of Stockport and beyond, to ensure limited resource is well directed.
4	(No response)

Feedback on actions for applicants

This section lists required and improvement actions resulting from the assessment. Required actions need to be addressed to meet accreditation in future. Improvement actions point to areas of future service development.

	Required/improvement?	Requirement number(s) to which it relates	Details
1	Required action	1.4, 2.4	Develop a plan for securing improved storage, whether through further investment in existing premises in response to survey work or through identifying alternative options, allowing the collections to grow and to be managed for the long term in suitable conditions.
2	Required action	1.4, 2.4	Work as planned with GMALSP to develop a collective approach to the capacity to acquire, preserve and make accessible a variety of digital records, to ensure the survival of the history of Stockport in the modern era.
3	Improvement action	1.6, 3.2	Roll out the updated volunteering paperwork and use this codification of the council's approach as a baseline from which to seek opportunities to develop a broader offer to members of the community with needs that might be addressed through a variety of volunteering offers.

4	Improvement action	2.3.2	Continue to work on the new implementation of the Spydus software which will allow online access to collections information for the first time; over time, establish a programme of retro-conversion of existing finding aids to raise the profile of collections.
5	Improvement action	2.4.2	Continue to work with expert conservation support, whether at Archives+ or through another provider, to understand the condition of collections and the preservation environment, so that this can inform current management and future planning.
6	Required action	2.4.3	Continue to manage the risks inherent in the existing stores, especially monitoring and addressing known leak risk areas to minimise any impact on collections.
7	Improvement action	3.2.1, 3.2.2	Review the information captured about users of the archives to ensure that those benefiting from displays, staff expertise and the online/surrogate offer are understood as archive users and the value of the service is articulated.
8	Required action	3.2.3	Seek opportunities to understand the service's potential audiences and to develop an offer, perhaps through collaborative working within the council, GMALSP or other heritage partners. Ensure that the future access plans of the archive service are well targeted and use resource effectively to meet the needs of on-site and remote audiences, and reduce barriers to use of the service.
9	Improvement action	1.2, 1.3	Continue to work collaboratively through the GMALSP to ensure that the service has capacity to identify and improve in priority development areas.