

Date of Meeting: 14/09/2021	Location: By video conference	THE
Title: User Advisory Group Meeting	Subject or Purpose: Minutes of the regular meeting held on the 14 <sup>th</sup> September 2021	NATIONAL ARCHIVES
ATTENDEES		
Sue Adams (Independent Researchers)	Emmajane Avery (TNA – Director of Public Engagement), Co-Chair	
Nadine Chambers (Students)	Matthew Cleary (Students & Online)	
Amelia Clegg (Students)	Rachael Corver (Head of Marketing & Communications)	
Stephen Daghish (Online)	Angela Graham (County/external Archives)	
Mike Grahn (On site Personal Interest)	Grace Ioppolo (Academic)	
Jeff James (CEO and Keeper) [Item 4]	Sadie Jarrett (Map Room & Early Career Academics)	
RK (Head of Strategic Operations and Volunteers)	Valerie Johnson (TNA – Director of Research & Collections), Co-Chair	
Sophie Kay (Diversity)	Gemma MacLagan Ram (Commercial Director)	
RM (Interim Personal Assistant)	Susan Moore (Map Room)	
Lee Oliver (TNA - Head of Visitor Experience)	Will Reid (Diversity)	
Pat Reynolds (Family History and Online)	Grace Touzel (External Archives)	
AV (TNA – Senior Personal Assistant), Minutes	Elli Young (Student and Early Career)	

### 1. Introduction and welcome to new delegates

Apologies were received from Alison Kay (External Archives).

EJA welcomed the new delegates to the group: Matthew Cleary representing Student and On-line users, Grace Touzel representing External Archives and Elli Young representing Student and Early Career users. The existing delegates introduced themselves and their interest groups.

### 2. Minutes, Matters arising (EJA)

2.1 The minutes from the meeting of the 8<sup>th</sup> June were approved.

2.2 Matters arising. Item 4.12 Roadmap Proposals (p3):

“With regard to the seating in the Map Room, the team will review the display of available seats – it may be that the screen display could be adjusted to make this clearer. **Action:** DF to review with the team.”

DF has advised that seating capacity has been more than doubled as a result of Step 4. The pre-Covid opening hours and on demand ordering were reinstated ahead of Step 4 as that was more to do with quarantining of documents.

### 3. Update on Visitor Experience (LO)

Minutes		1
---------	--	---

- 3.1 Step 4 on the 19<sup>th</sup> July meant that a number of restrictions could be lifted. TNA removed the mandatory pre-booking for reading rooms and opened up the exhibition spaces again. The family summer activity programme was launched. The capacity of the reading rooms was nearly doubled - although the number of seats are not quite back to pre-pandemic capacity the numbers available exceed current demand so no requests have been declined. The number of overseas visitors have been lower than usual at this time of year which may account for this.
- 3.2 The exhibition 'With Love' has reopened. This was open for just four weeks prior to lockdown in March 2020 but a further four months are available for the documents to be displayed so it was decided to give the public an opportunity to see these and the exhibition has proved to be successful.
- 3.3 The summer family activity 'The Pickles Trail' was launched. This is an interactive trail with clues both inside and outside the building. The trail features archival material from the finding of the stolen World Cup which was found by Pickles the dog in 1966. This activity has now finished but will be run again on the first Sunday in October. Both this and an activity for younger children was well received. The 'First Sunday' activities (centring on the exhibition, shop and café) are being trialled through September and October and will restart in January to coincide with the launch of the 1920s exhibition and 1921 census.
- 3.4 The Welcome Experience which had begun during pre-booked visits is continuing. A team of staff has been dedicated to helping guests navigate the Covid related restrictions and find their way around the Kew site safely. This has been so well received it is our aspiration to establish this as a permanent BAU service. Numbers on site are gradually increasing which is in line with what other institutions are seeing.
- 3.5 MG observed that the website is not reflecting the lifting of the pre-booking restrictions. The site states 'the building is open including our reading room and exhibition spaces' but the only link is 'Book a reading room visit' which gives the impression pre-booking is still required.  
**Action:** LO to investigate and follow up with the communications team. Pre-booking is still available and is advantageous for both the visitor and TNA as it enables documents to be ready for the visitor on arrival; otherwise there is up to an hour's wait. In the event of a rise in demand, a seat will also be reserved.
- 3.6 GI commended TNA's Twitter feed (including the wildlife updates) which builds TNA's relationship both with its audience and other institutions. EJA thanked GI and will pass on the feedback to the team.
- 3.7 SM asked if it would be possible for readers to order documents in advance for the next day or a couple of days as previously.  
**Action:** LO to investigate and revert.
- 3.8 EJA advised that recent visitor feedback shows that 89% of visitors feel that TNA has met their expectations. The pre-booking system has facilitated visitor surveys which have enjoyed a high rate of uptake and provided valuable insights to which TNA can respond.

**4. Chief Executive's Update (JJ)**

JJ's report had been circulated to delegates prior to the meeting so that delegates could raise specific questions with him:

- 4.1 Q. SM: Could TNA look at introducing a long-term goal/strategy which focuses on how best to serve researchers? TNA's recent policies seem to be focused on either making money or staff wellbeing - could operational benefits for researchers be prioritised instead? Is there a specific TNA Trustee or Board member whose remit is the researcher's viewpoint?  
A. JJ replied that the consideration of users runs throughout all senior management conversations. The last 18 months have been especially challenging, requiring TNA to balance the needs of researchers and staff but the primary consideration has been safety rather than efficiencies. TNA is a highly complex organisation, managing a wide variety of tasks including Crown Copyright, the reuse of public sector information and the publication of legislation. In addition, the Public Record Office task

Minutes		2
---------	--	---

covers the provision of the reading room and on-line services. TNA's users are therefore a broad church, for example legislation users' needs are quite different to those of researchers either visiting Kew or using the website. How best to respond to all their needs is at the heart of each Executive Team (ET) and Board meeting which looks at not just how to run the organisation as efficiently as possible but how this can benefit TNA's user base. It may be that more can be done on communication on this but one of the reasons for UAG is to reach out to user networks to hear user's feedback. Working for the benefit of users is on the remit of each ET and Board member.

4.2 Q. SM asked if it had been considered whether opening hours could be extended on a Wednesday to give a run of three late openings (Tuesday through Thursday).

A. JJ advised that recently opening hours have been restricted in line with Covid guidelines. TNA has limited funds and has to consider how to disperse those responsibly and this impacts on the provisioning and hours that TNA can provide. JJ's current focus is restoring TNA to pre-pandemic status and Lucy Fletcher and EJA have been tasked with looking at the roadmap for further relaxations. Enhancements beyond this are for further down the line.

4.3 EJA advised that a regular Covid planning management meeting is held. This team had planned for re-opening with the main objective being how best to serve readers, e.g. how many people can visit safely and for what hours. This has now been extended to welcome visitors who are not readers, for example to see exhibitions and delegates' comments on how to improve on these will always be welcomed.

4.4 LO is now responsible for the catering contract. The service provided by Maids of Honour has been well received but this is a temporary arrangement and government procurement rules require TNA to tender for a long-term provider later on this year. The service needs to be commercially viable as TNA cannot subsidise it and this will dictate the number of outlets, menu and opening hours. The opening hours and menu have recently expanded and this will continue.

Q. SM asked if the Balcony Café would be reopening as there were significant queues in the main canteen.

A. LO advised that staffing had been increased and a second till opened. Staffing is the most significant cost for catering organisations – reopening the Balcony Café would be expensive and there are insufficient clients currently on site to sustain it. As and when sufficient demand arises this will be revisited.

4.5 Q. GI requested an update on the recently announced partnership with the Parliamentary Archives.

A. JJ advised that a number of representatives were visiting TNA today as TNA and the Parliamentary archives explore how they might work together more collaboratively. Various service leaders responsible for reading rooms, collection care, digital archiving are meeting to look at how the two archives can work together for the benefit of both collections. A business case needs to go before various Parliamentary committees in the next few months. Following this, the nature of the partnership will be clarified and timescales set. It is an exciting opportunity but subject to approvals from the Parliamentary Committees. More news on this hopefully in the New Year.

4.6 NC. Congratulated JJ on the award of his Doctorate. NC is delighted to hear of the possible partnership with the Parliamentary Archive and on Court Judgments.

4.7 JJ advised that TNA will provide a service on Court Judgments from April with Parliamentary Archives to follow later, if agreed. A big part of the project is about accessibility, as part of 'Archives for Everyone' and how to make archival content available to researchers.

4.8 NC is looking forward to the planning for DCDC 2022 and a possible focus on student activity. JJ was pleased that DCDC went so well and conversations with partners are underway for 2022 – this is challenging as the environment is moving to a mix of events held physically and digitally. VJ and JJ are discussing this challenge with partners RLUK and JISC. The ARA conference also went well and ARA was pleased with the level of engagement they have had in particular from the international audience. An advantage of digital conferences is that they remove the barriers of cost and time for travel. VJ asked NC and other attendees for their feedback on what worked well or not at DCDC. NC recommended

Minutes		3
---------	--	---

that a hybrid virtual/on site conference is to be avoided as this does not work well and this was noted by JJ.

## 5. 1921 Census (GMR, RC, RK).

- 5.1 GMR advised that TNA is on target to publish the census through TNA's commercial partner, Find My Past (FMP), in January 2022. Lockdowns, staff illness and the need for social distancing had an impact on the work needed to prepare the census but TNA is due to meet the deadline and within the next 4-6 weeks there will be a public announcement regarding the launch date.
- 5.2 RC updated the group on TNA's plans on how to engage the public on this national moment. The census was scheduled for April 1921 but took place in June because of concerns around the General Strike. It is the most detailed census ever taken, reflecting the focus of the government of the day on data relating to occupation and employers. It is regarded as the first 'big data' census and has elements which were later developed into modern computing techniques.
- 5.3 TNA plans to engage people in two ways – the first with TNA's core audience (family historians, genealogists, archivists and researchers), ensuring that everyone can easily find their way to the census via FMP. Secondly, TNA is theming activities to appeal to diverse audiences who have not previously conducted family research or would not find their ancestry in the census, but who might find connections in place and changes in their local environment. This would include reaching out to teachers and schools.
- 5.4 The overarching campaign brand is 'We are #20sPeople', focusing on the changes in people's lives over one hundred years. In developing the campaign these were the key thoughts:
- Relevancy – why the census matters today
  - Identity – what can we learn about ourselves from connecting from the past?
  - Changing perceptions – myth busting, looking at the hidden stories and the real 1920s. Who were the #20sPeople and how were their lives different or the same?
  - Inclusivity – you do not need family links to participate in the programme - we are all #20sPeople.
- 5.5 Mock-ups of tube posters for #20sPeople were shared, featuring collages of people made up of photos of individuals from the 1920's and 2020's. The collage approach fits well with TNA's grid branding.
- 5.6 RC outlined the programme outputs:
- Census – this is at the heart of the programme and will include family history support both online and onsite, a census portal, webinars (for Family Historians, the Archives Sector and Researchers) and Archive Sector Engagement. The Outreach team are producing a mixed marriage sound play, lessons workshops and trails for schools
  - There will be an exhibition with a 20's themed late evening and talks around the exhibition
  - Around all of this is the #20sPeople campaign including editorial content on '20 Women of the 20s'; a social media series; blog content on the 1920s, and a family programme 'My 100 year self'
- 5.6 RK updated UAG on what is planned for the Reading Rooms for the census. TNA is keen to encourage as many researchers as possible to access the 1921 census, which is the last census for England and Wales before 1951. There will be free access to the census at Kew (as with all TNA's digitised records) but FMP will have an exclusive licence for a period, so many users may wish to access the census on site. To cope with the anticipated increase in demand more PCs and furniture will be placed in the reading room. In addition, trained record specialists will be available at the enquiry desks. There will also be a 'Start Here' desk together with the Research and Enquiry desk near the library with expert staff visibly available in the first few months. These staff have recorded webinars which will be played with subtitles on the display screens in the reading rooms and will also be available on the reading room PCs. In the library a display will look at life in 1921 and in the 1920's. Record specialists are putting together storyboards which will depict life in 1921 which are intended to direct users onto the site to look for their own stories. The storyboards will be as diverse as possible and will include the story of a TNA employee's grandmother born in 1921, stories of buildings and addresses including

Minutes		4
---------	--	---

Chancery Lane and tracing people from all walks of life.

5.7 Q: Has TNA reached out to historians of traveller, Roma or gypsy communities?

A: RC is not aware of activity in this area but will mention this to the Outreach team to see if they have any links with these communities based on previous work they have undertaken with them. The Outreach and Education teams are working on both a local and regional basis and with local archives to engage with communities in these locations.

5.8 Q: How long will FMP's exclusivity last?

A: GMR advised that this is commercially sensitive information so cannot be shared at present. However, it is appreciated that this information could be helpful for users so this is under review with FMP to see if this information can be shared.

5.9 Q: Will the 1921 webinars be available online?

A: RC advised that that they will, in addition to a back catalogue of webinars which can be accessed in the future.

5.10 SM is a Trustee for the British Association for Local History which represents societies all over the UK. As such, SM would like to put their communication expert in touch with TNA to help disseminate information.

**Action:** RC to pass on the contact details

## 6. Delegate submitted questions:

### 6.1 MoD records access (SK).

Q. TNA's news release regarding the transfer of MOD service records was received with some interest on Twitter. One area of concern has been raised about access in light of the transfer and would benefit from some clarification. The MOD's current policy currently restricts full public access to a record until 25 years after the death of a given serviceman/woman, but this rule is waived if the applicant is the next of kin of the deceased. Will TNA be retaining this approach (or some form thereof) when it takes control of the records? Although the current statement (included below) mentions the 115 year closure period, next-of-kin access doesn't seem to be a given. Some users are concerned that records they can currently access from the MOD will be closed to them once transferred to TNA, and are asking whether they need to pre-emptively order from the MoD now to avoid losing access. The relevant TNA public statement states "*As these are personnel records, they naturally contain a range of personal data including medical information. To protect the information in these records, closure will apply until 115 years past the date of birth of the individual. Whether or not the material can be open to all or closed fully or in part will be assessed on this basis or upon request under relevant data protection and freedom of information laws.*"

A. LO. TNA will not be operating access to these records in the same way as MOD currently do, because it is not permitted under law. When the records transfer to TNA they are governed by the law as it applies to TNA i.e. by the Public Record and the Freedom of Information (FOI) Acts. The FOI is 'applicant blind' and does not distinguish between applicants being next of kin or not. TNA will treat the access request as a request for the whole record rather than for specific categories of information, as MoD does currently. This means that more information should be available to those that request it (see MOD scheme here: <https://www.gov.uk/guidance/request-records-of-deceased-service-personnel>).

The 115-year closure period is based on date of birth; for individuals born before 1907 the full record of service will be open immediately for all enquirers, including next of kin.

It is an enormous collection which holds information of over 9 million individuals: including potentially living individuals. When making an access request, proof of death must be provided. If the person is still alive the record will remain closed. In the absence of proof of death, the guideline will be if the person is aged over 100 years old – this is current TNA practice in line with the FOI Act and any non-exempt information from the whole record can be released. The Data Protection Act ceases to apply to an individual from the date of death, but certain categories of information remain protected, in

Minutes		5
---------	--	---

particular medical information. Here other legislation means that this can remain closed for longer. However, this framework means that access to records will therefore be greater.

#### 6.2 **1921 Census water damage (SK).**

Q. Could you please advise on the extent & geographical coverage of the water damage to the 1921 returns?

A. EJA. With regard to the extent of mould and water damage, whilst it is extensive within the census, thankfully it isn't too severe. Around 10% of the records have water damage and mould but with no loss of information or physical damage and so there is comparatively minimal data loss. We estimate that less than half a percent (about 0.35%) of records are so badly damaged that there is loss of information and substrate. We don't currently have the geographic data on mould coverage but we hope to be able to look at this once more data is available following launch.

#### 6.3 **Document Quarantine over Autumn/Winter (SK).**

Q. Some users have observed the policy difference between TNA, which has lifted its document quarantine policy and National Records of Scotland, which is continuing to hold documents for a period of time after use before returning them to circulation. What might TNA users' expectations be as regards the continuation of the current arrangements in the reading rooms and document processing and what might be at risk of being rolled back should there be any worsening of the Covid situation over the autumn/winter period?

A. LO advised that the winter plan for England will be announced by the Prime Minister later on the 14th so more information and guidance is due imminently. Different regimes for mitigating Covid apply in Scotland and England and throughout the pandemic TNA has operated within legislation, regulations and guidance issued by the government. The scientific evidence in relation to quarantine has changed; early in the pandemic it was thought that handling items was a significant vector for transmission, but this later changed with guidance issued from Public Health England via DCMS. This guidance was intended primarily for libraries but as it applies to books, parchment and paper can also apply to archives. This states that the transmission risk from these materials being handled is minimal and therefore TNA was able to remove the quarantining of records after use. As this is based on scientific evidence, it is unlikely that this approach will change unless for example as a result of a new variant with a different transmission method. Other factors such as the reintroduction of lockdown regulations or the reintroduction of stricter social hygiene measures such as mask wearing and distancing would also impact TNA's capacity and therefore access to records.

#### 6.4 **Beta site functionality (SM)**

Q. Following on from the Beta testing of the new look catalogue there is concern that we might be losing the ability to browse the catalogue and to download search items into a spreadsheet, so some reassurance would be very welcome.

A. Our intention is to improve upon the current Discovery functionality and part of this process will involve careful review of its existing features, especially those that work well for the majority of users. Since Browse was originally developed our approach to data and technology has evolved considerably. So while we cannot guarantee that Browse will be identical (because we want to make it better) we can reassure you that the new version will keep the features that already work while offering a vastly improved user experience for all.

#### 6.5 **Subseries RG15 [1921 Census] (PR)**

Q. Who I should talk to about access the subseries listing for RG15?

A. Post meeting update: The 1921 Project Team has advised that they will be publishing series, subseries and sub-subseries level data onto Discovery the week commencing the 4<sup>th</sup> October, specifically series-level catalogue entries RG15 & RG114. This information will appear online on the 6/7 October. Subseries and sub-subseries catalogue entries (RG15 & RG114) will appear online on 8/9 October - this relates to geographical location data.

## 6.6 Timing of last orders (SM)

Q. Why are last document orders at 3pm? Can this be extended?

A. Document ordering currently closes at 3:30pm, prior to the pandemic this was 4pm (5pm on Tuesday and Thursdays). This decision was made as on-demand productions are taking slightly longer to produce than they were pre-Covid and DSD's target is to produce documents within 1 hour, so if someone orders at 4pm it's highly unlikely they'll have time to look at the document that day. With most readers ordering in advance, then being able to order during the day this does appear to satisfy the document demand, although we appreciate this won't apply to everyone. Our ordering system doesn't currently allow us to have different ordering times for different days although we do recognise that this is something that would be useful, particularly on Tuesday and Thursday openings. There are wider discussions taking place to address the areas that have not reverted back to pre-Covid rules this month (September) and the document ordering times are included within that. With the increase in advance orders it has put pressure in different parts of the service and it is expensive to keep on staff for the minority of users who wish to place orders after 4pm – TNA has to balance resources to user needs.

Q. Have TNA's opening hours been put back?

A. The building opens at 9 am with reading rooms opening at 9.30 am (apart from people wishing to obtain a new or replacement reader's ticket who can go up at 9am). Part of this timing is due to Covid mitigation measures – a lot of staff, contractors etc. arrive before 9am and this helps to avoid congestion in the entrance areas.

**Action:** EJA confirmed that TNA's Covid planning meeting is looking at public access and SM's comments will be fed back into this.

## 6.7 Security checks (SM)

Q. Why are lap tops subject to security checks on entrance to TNA?

A. Although the security measures at the entry/exit of the building are complementary to the Document Security Team they do have building security as their primary objective. The checks are to see if anything is concealed within the device which could cause harm or concern to people or the building. The team endeavours to undertake all security checks in a reasonable manner as well as ensuring that we maintain the government standards for security in a government building.

## 6.8 Balcony Café (SM)

Q. When will the Balcony Café be reopened?

A. The level of provision of catering has, and will continue, to grow in line with the increasing number of staff and visitors on site. However, numbers are significantly reduced compared to pre-lockdown levels, and it is expected to be some time before the demand will increase to a level that can sustain additional catering outlets, which includes the Balcony.

## 6.9 Document ordering (SJ)

Q. Please could we have an update on whether there's any plans to bring back the trial changes to document ordering which were scheduled to begin in March 2020?

A. There are no plans at present.

## 6.10 Digitisation (JA).

Q. Could we please have an update on digitisation?

A. This item will be included on the December meeting's agenda

## 7. Any Other Business (All).

7.1 The UAG Terms of Reference is to be reviewed and a draft will be circulated to delegates ahead of the meeting on Tuesday 7<sup>th</sup> December. Delegates will be asked to agree to and sign this in addition to the confidentiality agreement that they sign on joining.

7.2 Due to staff absence, an update on the Inclusive Archive work is to be carried forward to the December meeting.

Minutes		7
---------	--	---

- 7.3 An onsite tour to share the work Collection Care and others are doing on material culture has been postponed until onsite visits are possible, hopefully in 2022.
- 7.4 An update on TNA's student offer and post graduate workshops will be added as an item to the December meeting. See also the update in Appendix 1.
- 7.5 The possibility of resuming on site meetings is being kept under review but it is not possible to confirm when this will be at this time.
- 7.6 AV is standing down as UAG secretary; she was thanked by delegates. Her replacement will be confirmed in due course.
- 7.7 The Chairs thanked the outgoing delegates, Amelia Clegg, Angela Graham and Stephen DGLISH for their valuable contribution to UAG during their tenure – they will be very much missed both by the Chairs and the group as a whole.

The next meeting will be held on **Tuesday 7<sup>th</sup> December at 10.30 am**

\* \* \* \* \*

## Appendix 1.

### Postgraduate Archival Skills Training (PAST) workshops update (ER, Principal Records Specialist - Medieval)

During the 2020/21 academic year The National Archives hosted 250 students across 10 workshops. We hosted 6 'Introduction to Archival Research' one-day workshops in February and March, and 4 'Skills and Methodology' two-day workshops in June. Due to restrictions during the pandemic, all of these sessions were hosted online, and we had to alter the original PAST schedule to allow time for the creation of online content and resources (almost 17 hours of recorded video content produced for the Skills and Methodology workshops alone). We also had to cancel three planned summer 'Records Workshops', detailed one day sessions on specific document types. As a one-off measure we also offered heavily discounted tickets to our introductory workshops in support of students whose research had been affected by the closure of archives and libraries. Feedback was strong throughout all workshops, with 99.6% of students saying they would recommend the workshop to other students or colleagues.

We are currently finalising dates and timetables for the 2021/22 academic year. Drawing on feedback from the 2020/21 programme, we are looking into the practicalities of continuing to provide an online offering alongside traditional onsite workshops. It is intended (Covid permitting) that TNA will run 'Introduction To Archival Research' one-day workshops online and onsite in November and early December 2021, with an announcement to be made in the coming weeks. 'Skills and Methodology' workshops will be run (Covid permitting) between January and March 2022, with dates and content still to be finalised. An online offering will be included, although an exact programme has yet to be finalised. We hope that 'Records Workshops' will be able to return in June 2022, and we are also now exploring ways to engage with students as they continue their studies and careers.

\*\*\*\*\*

Minutes		9
---------	--	---