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Cumbria Local History Federation
Archives Training and Assistance Project Report



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15.8.2022	First Draft for CLHF Committee.
23.8.2022	Minor changes.
26.9.2022	Minor changes.

Executive summary

The Cumbria Local History Federation (CLHF) wished to provide archives training and assistance for member groups which hold archives. They commissioned an archives consultant, Kevin Bolton, to work with Cumbria Archives Service (CAS) to deliver this training and support between November 2021 and August 2022. The project was funded by a generous anonymous donation, a grant from the Cumberland and Westmorland Antiquarian and Archaeological Society, and money from the CLHF reserves (48% of project costs).

An online survey was issued to local history societies and groups to **understand their training needs**. 11 responses were received. These results were used to develop the training outline. In particular, there was a strong emphasis placed on digital preservation and digital access.

Two two-day **training courses on managing archives** were delivered in Carlisle and Kendal in June 2022 by Kevin Bolton and CAS. 32 people attended both courses from 14 societies. The training covered accessioning, cataloguing, preservation/conservation, copyright/privacy, digitisation, digital preservation, sharing collections online, and CAS. In general, feedback for the training was positive. There was some constructive feedback on the evaluation forms that some elements, particularly digital preservation, were too technical. The need for the creation of a self-support or peer network for those managing archives was also raised by some participants.

Following the training, groups were given the opportunity for a **follow-up visit for support and assistance** with Kevin Bolton. 10 groups were visited. A Committee member of CLHF attended each visit. Following each visit, Kevin Bolton created a report summarising the visit, identifying strengths/weaknesses in collections management, and outlining some recommendations. In summary, the following themes emerged.

- **Collection formats** All the groups had collections in physical formats and nearly all the groups had some type of digital collection.
- **Storage and packaging.** In general storage of the physical collections was quite poor, but some groups had made efforts to package their collections.
- **Resource and expertise.** I was amazed by the commitment, passion, and expertise of the volunteers, but nearly all the groups were struggling to recruit volunteers, especially younger volunteers.
- **Acquisition and provenance.** Very few groups have processes in place for accessioning or recording provenance.

- **Cataloguing.** Nearly all the groups have some type of catalogue for their physical collections, but it was quite common for digital archives to not be catalogued,
- **Digital storage.** Most groups are using a personal or a group PC/laptop to store their digital collections and they usually have a second copy of the data on a portable hard drive or on Cloud storage.
- **Digitisation.** Most groups have some type of digitisation equipment – either a scanner or camera, but they were often owned by an individual.
- **Websites.** A lot of the groups are struggling with their website. They are often using old or outdated web design software and they struggle sometimes to find volunteers to help run the website.
- **Online access to collections.** Alston Moor Historical Society has designed an in-house system to manage their collections and make their catalogues and digital collections accessible online.
- **Contemporary collecting.** I was slightly surprised by the lack of contemporary collecting by groups (e.g. late 20th century/21st century collections).
- **Capacity and audience development.** Groups talked about their struggles in recruiting new volunteers and attracting new audiences.

In terms of **recommendations**, CLHF could help co-ordinate or facilitate the following to assist the groups:

- (i) **Managing archives resources.** Publish the training resources created by Kevin Bolton and CAS on their website.
- (ii) **Knowledge sharing.** Could CLHF facilitate an annual or bi-annual day conference where groups come together to share their expertise and knowledge in managing archives? Is there a way they can communicate online?
- (iii) **Collections management system.** Is there a way CLHF can help groups use the Alston Moor Historical Society system (e.g. hosting it for other groups)?
- (iv) **Websites.** Could CLHF speak to Lil Creative Studio about what support and training they could offer groups around website development?
- (v) **Contemporary collecting.** Could CLHF and perhaps CAS encourage groups to nominate local websites for archiving to the UK Web archive¹?
- (vi) **Packaging.** Could an external grant by CLHF help provide groups with a small budget to purchase some basic packaging and equipment?

¹ See <https://www.webarchive.org.uk/en/ukwa/nominate>

In terms of funding the National Lottery Heritage Fund or the National Archives Collaborate and Innovate fund² (£5,000-£15,000) could be options for some of the above.

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² <https://www.nationalarchives.gov.uk/archives-sector/finding-funding/collaborate-and-innovate/about-collaborate-and-innovate>

1. Project background

The Cumbria Local History Federation (CLHF) was formed in 1992 by a group of organisations and individuals keen to provide a focus in the County for local historians and local societies. The role of the CLHF is primarily in communication and information, promoting its member societies and their work, providing a means of co-operation and the exchange of ideas, and connecting its members with relevant resources and information. Where appropriate, the CLHF provides publications and organises events.

The Cumbria Local History Federation (CLHF) wished to provide archives training and assistance for member groups which hold archives. They commissioned an archives consultant, Kevin Bolton, to work with Cumbria Archives Service (CAS) to deliver this training and support. The project was funded by a generous anonymous donation, a grant from the Cumberland and Westmorland Antiquarian and Archaeological Society, and money from the CLHF reserves (48% of project costs).

The project was delivered between November 2021 and August 2022 and included:

- A training needs assessment of local history groups and societies on managing archives by Kevin Bolton.
- The development of the training and supporting resources for local history groups and societies on managing archives by Kevin Bolton and CAS.
- The delivery of two two-day training days at Cumbria Archives Service (Carlisle and Kendal) by Kevin Bolton and CAS.
- Follow-up visits to ten local history groups and societies by Kevin Bolton to provide further support, assistance, and advice. At each visit a CLHF Committee member attended.
- Creation of a short report following each visit by Kevin Bolton.

This report summarises the results of the project. It includes:

- Results of the training needs assessment (Section 2).
- Results of the evaluation from the training (Section 3).
- Key themes that emerged from the visits (Section 4)
- Recommendations for next steps (Section 5).

2. Training needs assessment

An online survey was designed by Kevin Bolton in partnership with CLHF and CAS to understand the training needs of the societies and groups. The survey was issued by the CLHF Secretary on 26 December 2021 to local history societies and groups who had previously confirmed their wish to participate in the project (13). The survey ran until 18 January 2022 and 11 responses were received.

The survey asked “to what extent does your society or group need training in the following areas?”. Figure 1 below summarises the results. These results were used to develop the training outline. In particular, there was a strong emphasis placed on digital preservation and digital access.

The survey also asked an open-ended question “do you have any comments or feedback?”. The following responses were received:

“Regular offers of new material and increasing pressure on space make knowledge of all the above more important than ever. Effective use of resources post covid is also likely to be a challenge.”

“We have largely sorted and recatalogued our archive material during lockdown. In the absence of training we have done it in a way that made sense to us without following any National/professional guidelines.”

“We basically need help in most aspects of our collection”

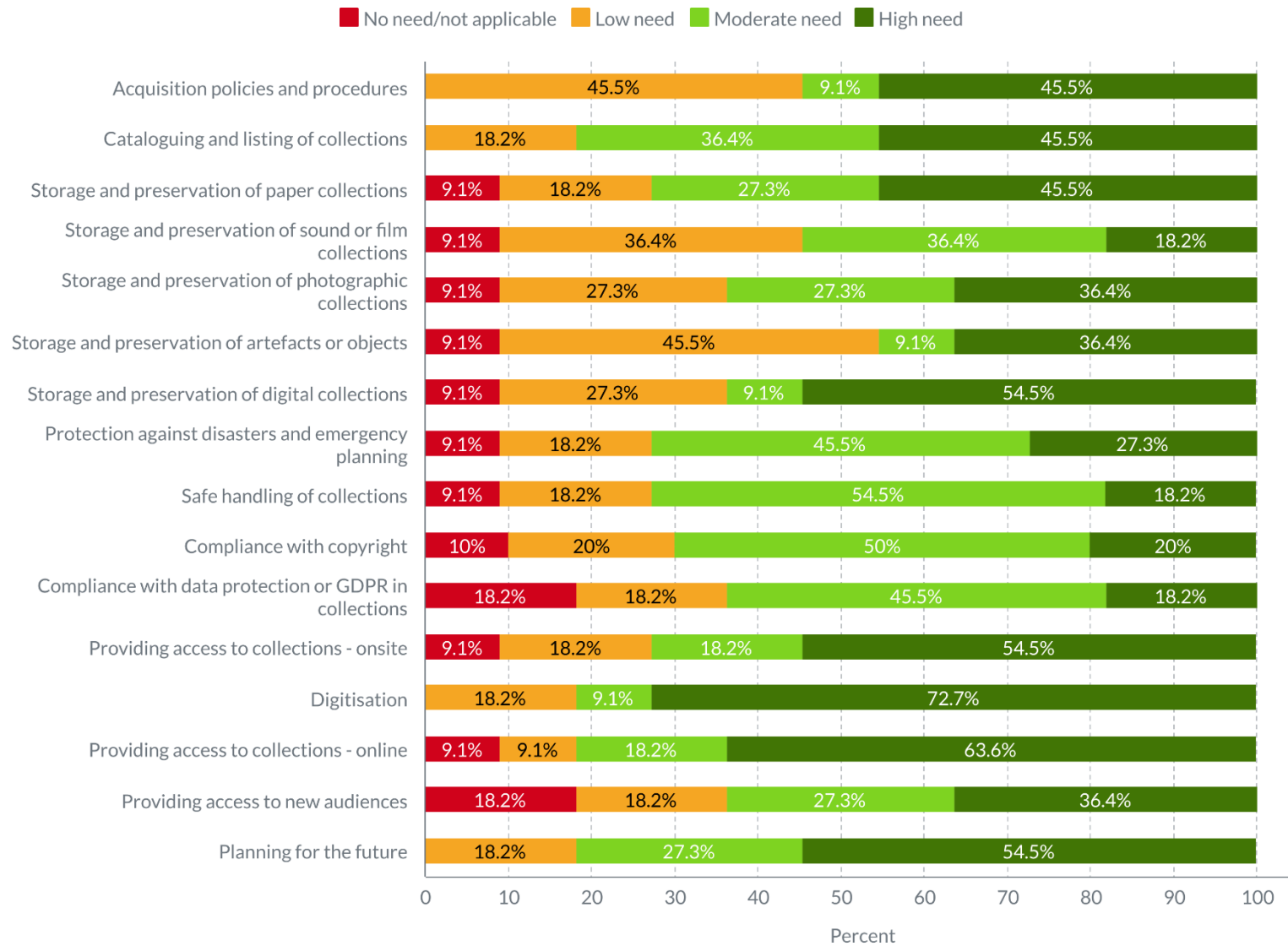
“In most cases we have indicated a "Moderate need". This is due to the fact that our understanding of what is behind and what prompted these particular areas of enquiry - for instance what is meant by safe handling and how much do we need to be concerned about Copyright and GDPR, what sort of access are we talking about. We would need more definition/discussion to decide if our needs are low or high but we do believe that we need some training in all aspects mentioned in the questionnaire.”

“More on would be helpful: Confidentiality e.g. using or redacting names when using archive documents and images / deciding what is worth archiving locally / What will archive offices take and who then owns it / restrictions on access e.g. members only or everyone / could it provide an income for the group.”

“We had some training from Cumbria Archives as part of a grant received in 2006. We probably most need to be brought up to date with current procedures. Planning for the future is vital, we are an ageing committee and haven't been able to recruit new committee members for some time.”

“xx is very fortunate to have its own website and Archives office and store. The Society received a community fund grant to buy archival quality stationery materials and office and display equipment. xx has a high level of expertise in some fields and has had training from CRO in Carlisle in others. The 'Low' category completed is an indication that a refresher course in all fields would be appreciated.”

Figure 1- Results of CLHF archives training needs survey



3. Training

Two two-day training courses on managing archives were delivered in Carlisle and Kendal in June 2022. 32 people attended both courses from the following societies (14):

- Alston Moor Historical Society
- Armitth Museum and Library
- Burton, Holme, and District Local History Society
- Cartmel Peninsula Local History Society
- Cockermouth Heritage Group
- Duddon Valley Local History Group
- History of Kirkby-in-Furness Group
- Kirkoswald and Renwick History Group
- Lowther and Askham History and Archaeology Society
- Ravenstonedale Parish History Group
- Shap Local History Society
- Sedbergh and District History Society
- Ulverston and District Civic Society
- Kirkoswald and Renwick History Group

The agenda for each day was as follows:

Day 1

- 9.45 - Arrival, tea and coffee
- 10.00-10.15 - Welcome and introductions (Peter Eyre)
- 10.15-12.00 - Accessioning and cataloguing (Robert Baxter and Kevin Bolton)
- 12.00-13.00 - Lunch
- 13.00-15.00 - Preservation and conservation (Erika Freyr and Fay Humphreys)

Day 2

- 9.45 - Arrival, tea and coffee.
- 10.00-11.00 - Copyright and privacy (Kevin Bolton)
- 11.00-12.00 - Digitisation (Kevin Bolton)
- 12.00-13.00 - Lunch
- 13.00-13.45 - Digital preservation (Robert Baxter)
- 13.45-14.30 - Providing access and sharing online (Kevin Bolton)
- 14.30-15.00 - Cumbria Archive Service and local groups: how can we help each other? (Peter Eyre)

In general, feedback for the training was positive. The results of the evaluation can be found below in Table 1. There was some constructive feedback on the evaluation forms that some elements, particularly digital preservation, were too technical. This was also fed back verbally during the archive visits. In terms of basic ICT skills, there was quite a wide range of expertise amongst participants from none to very experienced. In retrospect, it might have been good to have split the groups into two for the digital elements and delivered ‘basic’ and ‘advanced’ sessions.

Some participants fed back that it would have been good to have more practical sessions. The need for the creation of a self-support or peer network for those managing archives was also raised by some participants. Participants seemed to enjoy sharing knowledge and experience with each other.

Table 1 - How would you rate the following elements of the training?

	<u>Very good</u>	<u>Good</u>	<u>Adequate</u>	<u>Poor</u>
Accessioning	65%	35%	-	-
Cataloguing	54%	41%	-	5%
Preservation and conservation	70%	30%	-	-
Copyright and privacy	69%	31%	-	-
Digitisation	69%	31%	-	-
Digital preservation	15%	71%	7%	7%
Providing access and sharing online	39%	46%	15%	-
How can Cumbria Archives help you?	54%	38%	8%	-



Training at Carlisle Archive Centre

4. Visits

Following the training, groups were given the opportunity for a follow up visit for support and assistance with Kevin Bolton. The following groups were visited:

- Alston Moor Historical Society
- Armitth Museum and Library
- Burton, Holme, and District Local History Society
- Cartmel Peninsula Local History Society
- Cockermouth Heritage Group
- Duddon Valley Local History Group
- History of Kirkby-in-Furness Group
- Ravenstonedale Parish History Group
- Shap Local History Society
- Sedbergh and District History Society

Each visit followed the following outline:

- Introductions and explaining the purpose of the visit.
- Background to the society or group.
- Outline of collections and collections management procedures.
- Viewing collections storage and in some cases digital collections.
- General discussion about any issues etc.

A Committee member of CLHF attended each visit. Following each visit, Kevin Bolton created a report summarising the visit, identifying strengths/weaknesses in collections management, and outlining some recommendations. These reports can be found in Appendix A. In summary, the following themes emerged.

Collection formats

All the groups had collections in physical formats and these often-included photographs, ephemera, research papers, documents, maps, indexes, and books. In some cases, groups have a handful of objects or artefacts. Cockermouth Heritage Group has a relatively large collection of objects. Some groups like Sedbergh and District History Society avoided collecting anything in original format and made copies or transcripts. Other groups had good relationships with Cumbria Archives Service and had transferred some material to them.

Nearly all the groups had some type of digital collection and in some cases, these were quite large. These often consisted of digital copies of collections from their physical archive, digital copies of documents and photographs held by private individuals, digital copies of collections held by other archives, oral histories and/or research/indexes created by members. A small number of groups are moving away from collecting physical formats and having just digital collections.

Storage and packaging

In general storage of the physical collections was quite poor. Most groups had a space in a parish or village hall/centre for storage. A couple of groups stored the collections at the home of a Committee member. Shap Local History Society owns its own heritage centre building. There were sometimes risks to the collections in terms of environmental conditions, security, fire, and water damage.

Some groups had made efforts to package their collections in archive quality packaging. Given the quality of the storage was usually out of their hands, good quality packaging seems like a good way to mitigate some of the risks to collections. A lot of my recommendations to the groups were around prioritising the packaging of collections that are unique or rare.

Resource and expertise

I was amazed by the commitment, passion, and expertise of the volunteers. The volunteers possessed a wide range of skills and experience including ICT/programming, photography, legal, and oral history. Nearly all the groups were struggling to recruit volunteers, especially younger volunteers, to help run the Society and manage the collections. Usually, the archive is managed by 1-2 people, but a handful of groups have 5-6 volunteers working on the collections which I thought was impressive.

Acquisition and provenance

Very few groups have processes in place for accessioning or recording provenance. Some groups have a 'source of acquisition' field on their catalogue that might record it. Cockermouth Heritage Group has very good quality entry/receipt forms for acquisitions which were based on the Spectrum museum standard. Cartmel Peninsula Local History Society have a good permissions form for digital acquisitions.

Cataloguing

Nearly all the groups have some type of catalogue for their physical collections. These were usually arranged by subject or place using Excel. Alston Moor Historical Society has developed its own system which is quite sophisticated, and a couple of groups were using the Adlib system. There were a small number of groups who had no type of catalogue. It was quite common for digital archives to not be catalogued and some of my recommendations are based on ensuring they are catalogued.

Digital storage

Most groups are using a personal or a group PC/laptop to store their digital collections. However, they usually have a second copy of the data on a portable hard drive and one of the groups was using Microsoft OneDrive to create a second copy of the data. Some of my recommendations are based on ensuring groups have a second or even third copy of the data stored somewhere different to their PC/laptop.

Digitisation

Most groups have some type of digitisation equipment – either a scanner or camera. However, they were often owned by an individual, rather than the group. Some groups have digitised photographs and documents in JPEG format, rather than TIFF. For a small number of groups, I make recommendations about digitisation equipment and digitisation standards.

Websites

A lot of the groups are struggling with their website. They are often using old or outdated web design software. Groups also struggle sometimes to find volunteers to help run the website. CLHF have used Lil Creative Studio to design their website and the History of Kirkby-in-Furness Group is also working with them on a new website. There could be potential to share learning with other groups around this.

Online access to collections

Alston Moor Historical Society has designed an in-house system to manage their collections and make their catalogues and digital collections accessible online. The system is impressive and there could be scope to share it with other groups. However, some groups do not quite have the building blocks in place (e.g. good quality catalogue/images) to think about online

access. In some cases, I talked about hosted collection management systems that groups could use (e.g. Omeka, E-hive), but often the costs of these systems or the limited functionality were off-putting.

Contemporary collecting

I was slightly surprised by the lack of contemporary collecting by groups (e.g. late 20th century/21st century collections). Some groups had carried out or were planning to carry out oral history projects. Cartmel Peninsula Local History Society had undertaken a photographic project in 2016. It feels like there is scope for groups to do more about contemporary collecting, especially in nominating important local websites for archiving to the UK Web Archive.

Capacity and audience development

Groups talked about their struggles in recruiting new volunteers and some groups such as Cocker mouth Heritage Group have worked with schools. However, only one group (Aston Moor Historical Society) was seriously thinking about marketing and developing its audiences. They acknowledged their audience was quite narrow and were thinking of ways of attracting new people.



Example of some well packaged collections

← → ↻ 🔒 https://www.amhs.org.uk/cat/showrecord.php?ls=25

AMHS - Archive Catalogue

HOME NEW SEARCH HELP

New Search

Back to Search Results

SD/01064 Photograph About this image... < >


White line marker.
Margaret's father, Mr. Leatherby in cricket garb in Whitfield. is it a tea urn?, bait basket? No, it's the white line making fluid.
Cricket.

Subject(s): Sport and Recreation

Place(s): Northumberland

Date:

Collection: Simon Danby photographs ⓘ



There are no Notes attached to this record.



Example of storage – good archive boxes, but poor quality/cramped store

5. Recommendations

The CLHF could help co-ordinate or facilitate the following to assist the groups:

- (i) **Managing archives resources.** Publish the training resources created by Kevin Bolton and CAS on their website.
- (ii) **Knowledge sharing.** Could CLHF facilitate an annual or bi-annual day conference where groups come together to share their expertise and knowledge in managing archives? Is there a way they can communicate online?
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- (iv) **Websites.** Could CLHF speak to Lil Creative Studio about what support and training they could offer groups around website development?
- (v) **Contemporary collecting.** Could CLHF and perhaps CAS encourage groups to nominate local websites for archiving to the UK Web archive³?
- (vi) **Packaging.** Could an external grant by CLHF help provide groups with a small budget to purchase some basic packaging and equipment?

In terms of funding the National Lottery Heritage Fund or the National Archives Collaborate and Innovate fund⁴ (£5,000-£15,000) could be options for some of the above.

³ See <https://www.webarchive.org.uk/en/ukwa/nominate>

⁴ <https://www.nationalarchives.gov.uk/archives-sector/finding-funding/collaborate-and-innovate/about-collaborate-and-innovate>