



HG-014-08167 The Hold

11. Management & Maintenance Plan



## **Management and Maintenance Plan for Suffolk Record Office Archive Collections**



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## **ACRONYMS**

BRO – Bury Record Office (branch of SRO)  
CAA - County Archaeological Archive  
GIS - Government Indemnity Scheme  
HLF – Heritage Lottery Fund  
IRO – Ipswich Record Office (branch of SRO)  
ISAD(G) - International Standard Archival Description (General)  
LRO – Lowestoft Record Office (branch of SRO)  
MMP – Management and Maintenance Plan  
NCS - National Conservation Service  
OAIS - Open Archival Information System  
PDA – Personal Digital Assistant  
PSQG - Public Services Quality Group  
RIBA – Royal Institute of British Architects  
SCC - Suffolk County Council  
SCCAS - Suffolk County Council Archaeological Service  
SIAH - Suffolk Institute of Archaeology and History  
SRO – Suffolk Record Office  
TNA – The National Archives  
UoS - University of Suffolk



## Glossary

**Accessioning** – the process of physically and legally transferring archival material into the SRO collections

**Accruals** – additions to a collection which are added to the collection after the initial collection is accepted by SRO

**Blast freezing** - designed to quickly freeze in a few hours and often used following water damage

**CALM** - proprietary software used to accession, catalogue and manage collections

**Cataloguing** – the process of creating a written description which describes the content of a collection and explains the history and interrelationships of the records therein

**Collection** – archival material which has the same provenance and is treated as a discrete unit for physical and intellectual management

**Decant and recant** – the process of moving collections from current strongrooms and into The Hold

**Digital preservation** – the combination of policies, strategies and actions to ensure access to reformatted and born digital content regardless of the challenges of media failure and technological change. The goal of digital preservation is the accurate rendering of authenticated content over time

**Open Archival Information System** - is a conceptual framework for an archival system dedicated to preserving and maintaining access to digital information over the long term.

**Preservica** – a proprietary digital preservation system

**Records Management** - controlling records within a comprehensive regime made up of policies, procedures, systems, processes and behaviours to ensure that reliable evidence of actions and decisions is kept and remains available

**Red Rot** – degradation in vegetable-tanned leather caused by high levels of relative humidity, temperature and/or pollution

**Secondary packaging** - Envelopes, folders or polyester sleeves that provide additional protection within an archive box and during productions

**Surrogate** - Copy (microfilm, digitised or photocopied) made to preserve the originals and to improve access to the materials, which might be rare and/or in fragile condition

# 1. Introduction

This Management and Maintenance Plan (MMP) lays out action plans for achieving improved collection management and access for the archive and local studies collections proposed for The Hold; the new flagship heritage facility for the Suffolk Record Office and transformed archive service. It provides a brief explanation of the heritage's content, significance and management and also summarises the risks the heritage faces. It identifies the management and maintenance aims and objectives and lays out action plans for conservation and documentation work on the heritage. It provides costed plans for the required conservation/documentation work to the heritage as well as in relation to the new building itself, its exhibition/interpretive assets, and digital features.

For clarity, the proposed new facility for Suffolk's archival collections, 'The Hold', will accommodate:

- All the SRO collections currently stored at the Ipswich Record Office (IRO).
- Some SRO collections currently stored in the main building and the outstore of the Bury Record Office (BRO) (some collections will remain in the BRO main building after The Hold is open).
- The SRO collections currently stored in the strongrooms at the Lowestoft Record Office (LRO).
- The SRO digital collections.
- Paper and digital records from the Suffolk County Council Archaeological Service (SCCAS).
- Future accruals for the whole of Suffolk for 20 years.
- University records.

Consequently, this document focuses on all three SRO branches and their collections. The SCCAS is also highlighted where appropriate.

## How this report has been developed

This plan has been written taking into account the HLF Management and Maintenance Plan Guidance (Oct 2012), and relevant archival legislation and standards. For physical conservation issues, the National Conservation Service (NCS)<sup>1</sup> visited and assessed the current standards of storage and state of the collections at the four collection storage facilities within Suffolk. It has specifically looked at the key formats within the SRO collections and sought to ascertain the extent, as a proportion of the whole, of these formats and their direct needs, to aid planning of the new facility. Each of the storage facilities was visited and an assessment carried out; a more detailed analysis of the collections at the Ipswich

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<sup>1</sup> The NCS team comprised Chris Woods and Jonathan Rhys-Lewis, both Accredited Conservator-Restorers, and Elizabeth Oxborrow-Cowan, a professionally qualified Archivist

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site was carried out as it is the largest facility and contains the full range of collection formats. Further targeted surveys were carried out by NCS personnel and by SRO staff, to gain greater information about specific, prioritised collections, about packaging needs for decant and to gather information about 'special needs' materials (photographic and audio-visual). A parallel survey of maps was undertaken by NCS as part of the Sharing Suffolk Stories project<sup>2</sup>. All of these surveys and others undertaken into the future will be used to define conservation needs and to inform the ongoing management of the collections.

To assess wider collection management issues the NCS visited all the branches of the SRO to assess the impact of the physical environment on managing collections and collection access. SRO staff were also interviewed extensively. NCS then worked with SRO staff to develop a suite of policies and practical plans for conservation work and documentation work to improve the condition and accessibility of collections over a ten-year period.

### **Relationship to other documentation**

The MMP should be read in conjunction with the Conservation Plan. The Conservation Plan provides greater detail on the content, significance and current management of the collections. The Activity Plan is informed by the Conservation Plan and the Management and Maintenance Plan. The costs are incorporated in the Business Plan.

### **Project Vision and Description**

The Hold is a partnership between Suffolk County Council and the University of Suffolk that will create a new, flagship heritage facility and a reshaped service, launching people, young and old, on new voyages of discovery.

Located within Ipswich's unique and regenerating Waterfront, The Hold will house Suffolk's nationally and internationally significant archives and will be the engine for a transformed, audience-focused service that will reach out to the diverse communities in Ipswich, the county and the nation through its activity and digital programmes, engaging them with Suffolk's rich archival heritage in new and exciting ways.

The Hold will open its doors to reveal Suffolk's treasured past and inspire Suffolk's future.

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<sup>2</sup> For information on the Sharing Suffolk's Stories project, refer to the Activity Plan for The Hold, Chapter 6, activity 1.9

## **Project aims**

### For heritage:

- To safeguard Suffolk's irreplaceable collections with state-of-the-art accommodation.
- To create an efficient building and service, bringing more of Suffolk's heritage together on one site.
- To create space to showcase Suffolk's heritage and provide interpretation to a broader audience.
- To provide an enhanced online offer and allow visitors anywhere in the world to interact with Suffolk's collections.
- To enhance Suffolk's collections through an ambitious Activity Plan.

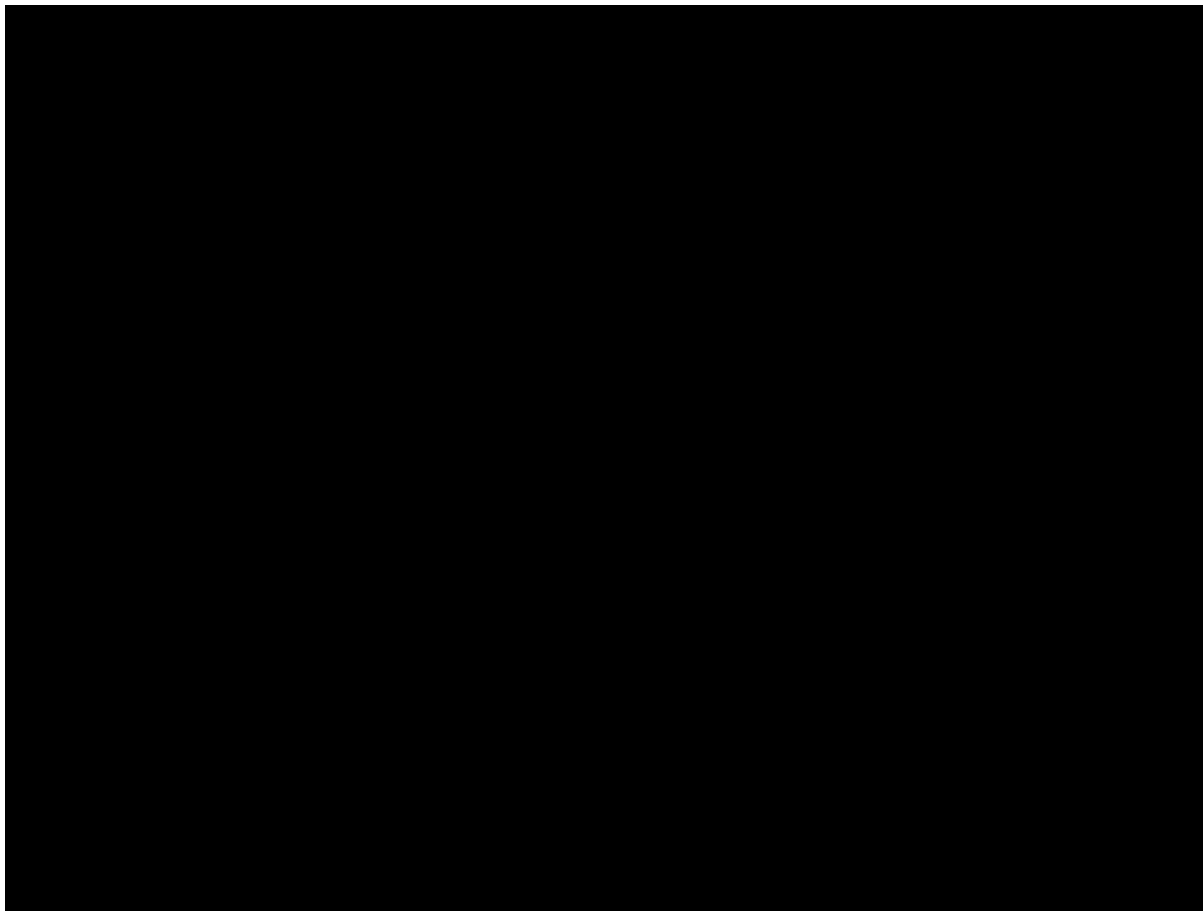
### For people:

- To forge a sustainable, learning partnership with one of the UK's newest universities; the University of Suffolk (UoS).
- To have a positive impact on the employability of UoS students.
- To create new learning opportunities and drive the renaissance of Suffolk Archives' schools offer.
- To remove barriers to engagement and increase our reach to diverse audiences.
- To diversify our volunteer base and increase levels of engagement in the service.

### For communities:

- To create an environmentally sustainable building reflecting best practice.
- To contribute positively to the critical mass of regeneration activity on Ipswich Waterfront.
- To create a resilient, commercially-focused and outward-facing Suffolk Archives Service.
- To empower communities in undertaking their own heritage activities.





## 2. Understanding the heritage and the current situation

A detailed description of the archive collections and the local studies collections ('the heritage') and their background is provided in the Conservation Plan in Chapter 3, pp 17 - 29.

A full analysis of the significance and value of the heritage is provided in the Conservation Plan in Chapter 4, pp 57 to 107.

How the heritage is currently managed is explained in detail in the Conservation Plan in Chapter 3, pp 20 - 56.



## 3. Summary of the risks to collections

### 3.1 Introduction

This section summarises the risks to the collections. A full risk analysis is given in Section 5 and Appendix 2 of the Conservation Plan. The major areas of risk are:

- Poor Quality Strongroom Storage
- Inadequate and Inefficient Building Accommodation
- Conservation Provision

SRO currently manages and provides three sites for public access with onsite storage of archival material at IRO, LRO and BRO and an outstore at Bury St Edmunds. The complexities of managing this number of sites leads to inefficiencies of staff time, confusion for users on where to go and an increase in running costs. The Hold project will facilitate the rationalisation of collections and enable the above issues to be addressed. It will also enable SRO to be able to address the requirements of Archive Service Accreditation relating to the collections, their management and accessibility.

### 3.2 *Poor quality strongroom storage against PD 5454 and BS 4971*

- All three SRO strongrooms are full, prompting TNA to withdraw their higher 'full approval' status for all SRO branches and thus means SRO is also unable to apply for Archives Service Accreditation whilst this status is withdrawn
- No cold storage for plastic photographic collections
- No dedicated isolation or collection cleaning spaces
- IRO & BRO annexe struggle with environmental control
- Flood risks at IRO and BRO
- BRO outstore does not have restricted access around the whole perimeter
- BRO outstore lacks environmental controls
- LRO strongroom has difficulty controlling access as part of library – library and contract staff can access the strongroom
- Services pass through LRO strongroom
- No automatic fire fighting systems in BRO annexe, outstore or LRO
- Questions over the long-term affordability of the environmental control equipment in IRO
- Offsite storage has increased risk of theft and vandalism and requires transport of collections for access onsite
- LRO collections have to be moved through public library areas when being transported from store to the searchroom

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### **3.3     *Inadequate and Inefficient Building Accommodation***

All three of the SRO branches are located in buildings that have been adapted rather than being purpose-built for the service they operate. The consequences of this are haphazard and inefficient layouts of the public and staff areas with poor 'flow' through the site. These problems are further compounded at IRO due to the Grade II listed building status it holds. This building does not allow the SRO to be able to provide a modern, efficient 21st century service to the public and cannot meet the expectations of Archive Service Accreditation for collection accommodation and providing access to collections. Issues include:

- Listed Building Status at IRO restricts development choices on existing site creating inefficiencies and uncomfortable conditions for users, staff and volunteers.
- Maintenance backlog at IRO such as new boiler.
- Lack of Space at IRO severely inhibits service development.
- Poor flow & Connectivity of building layout creates inefficient work flows and unclear routes for users
- Uncomfortable Working Conditions.
- Very poor disabled access at IRO.
- Site Security is poor at IRO leading to vandalism and theft.
- IRO's location is some distance from Ipswich town centre in an unwelcoming area and bordered on two sides by very busy roads.
- The BRO outstore is on a flood plain, a distance from the main BRO building.

### **3.4     *Conservation***

The condition of collections and the minimal availability of conservation expertise and facilities places limits significantly the service's ability to address long term deterioration issues and the accessibility of decayed materials:

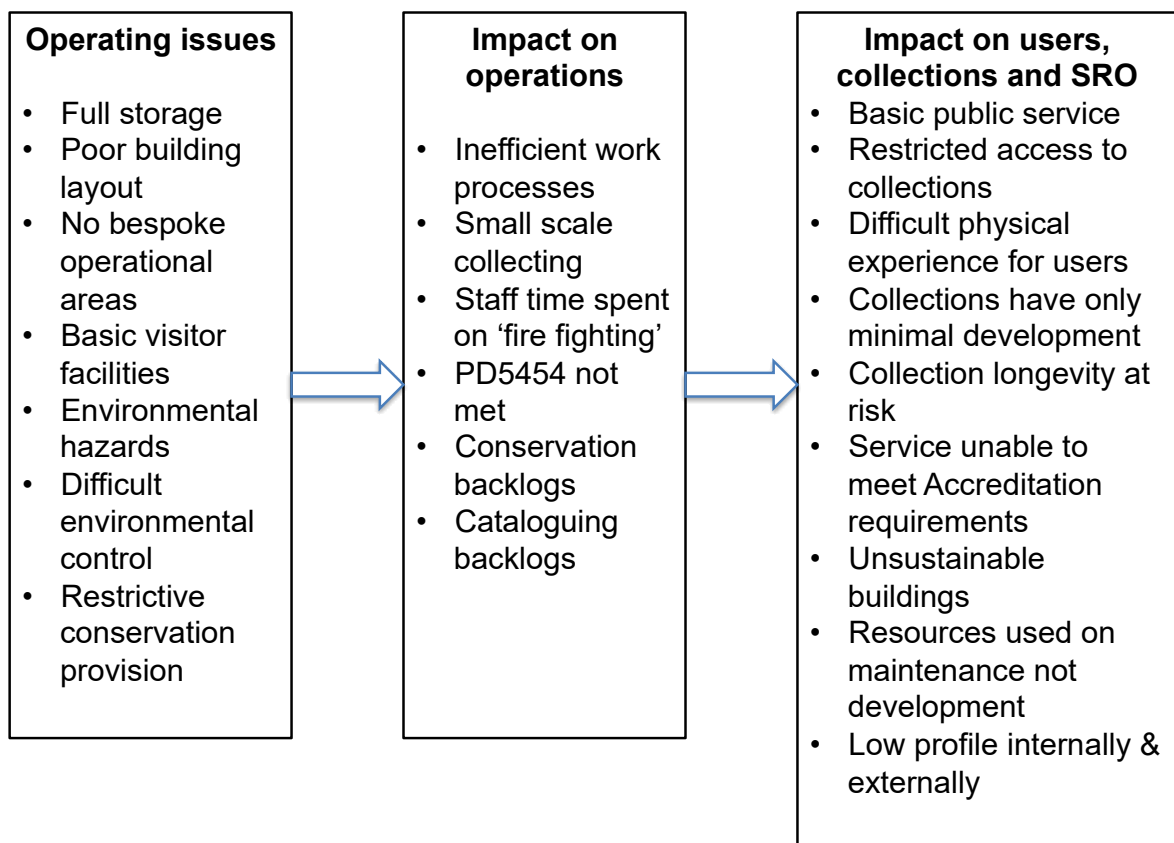
- 21% of the SRO collections require boxing and/or secondary packaging.
- Over 95% of uncatalogued collections require secondary packaging.
- 38% of uncatalogued collections required cleaning.
- There is a backlog of fragile material awaiting conservation – 9.5% of uncatalogued materials identified as priorities require remedial treatment.
- 0.25% of (catalogued) items requested for searchroom use cannot be used without major remedial treatment.
- Lack of space in the conservation suite to treat large format items.
- No onsite conservator at BRO or LRO.
- No freezer storage facility to arrest the deterioration of plastic photographic material.

### 3.5 *Impact*

The consequence of these risks is that SRO:

- Is unable to collect on a significant scale.
- Has collections which are under threat (albeit managed threat) from issues such as inherent decay, flood and vandalism.
- Is not keeping up with the remedial conservation backlog.
- Has very inefficient work processes arising largely from building issues.
- Does not have suitably inert building structures to provide environmental control to ensure the longevity of collections.
- Provides a difficult visit for users.
- Fails to meet key standards notably BS4971 and PD5454 (and its imminent successor, EN16893) and the PSQG Access Standard.
- Cannot apply for Archive Service Accreditation, as is required by The National Archives of all Places of Deposit.

The impact of these risks is summarised in the following diagram:



## **4. Management and Maintenance Aims and Objectives**

### **4.1     *Introduction***

This section outlines the principles and aims of conservation also the management of collections, the new building, its exhibitions/interpretive elements, and digital features. For brevity, all aspects of collection care, both physical and intellectual, are referred to as 'collection management'.

### **4.2     *Principles for conservation and collection management***

The principles of all conservation and collection management work both current and future are:

#### ***Maximises access***

- Heritage collections are a shared resource preserved for the benefit and access of the whole community.
- Collections are properly managed physically and intellectually to maintain their values.
- Action, including exhibition and interpretation, makes the heritage meaningful.
- Digital technologies are appropriately exploited for access and curation to reach key audiences.
- Equitably supports the partners of The Hold so that all their collections are accessible and secure.
- Access is not to the detriment of the material.

#### ***Maintains and extends the content and understanding of inherent values in the heritage***

- Action is based on a comprehensive understanding and assessment of the significance.
- All work maintains authenticity and integrity.
- Work maintains and enables the contextualisation of an item or collection.
- Decisions are transparent and documented.
- High quality working practices are standard.
- Knowledge and practice is kept up-to-date.
- All work is founded on robust, systematic processes of recording and documentation.
- Intervention is kept to a minimum.
- Decisions are based on cost-effective solutions.



### **4.3     *Aims of collection management***

The overriding aim of collection management work is to maximize both the longevity of and access to collections. These can be conflicting goals and so the project will use both physical and digital means to meet this aim and seek to resolve the inherent conflict.

The individual aims of the collection management programme will be:

- To ensure all collections are managed to the highest standards through a coherent framework of policies and procedures.
- To significantly increase the availability of collection knowledge through the professional documentation of a substantial proportion of the collections.

### **4.4     *Objectives***

Underpinning objectives for best practice in collections care and accessibility are:

- Developing the infrastructure to achieve the Archive Service Accreditation Standard.
- Ensuring the collections identified as 'Notable' (see Conservation Plan, 4.7) are prioritised in collection care and exhibition planning.
- Developing collections and sustainable collecting capacity to ensure SRO's holdings continue to survive and thrive and to be rich and vibrant.
- Achieving sufficient space for efficient and effective storage, conservation of collections meeting the current standards:
  - PD5454:2012 (and its imminent replacement EN 16893)
  - BS4971:2017
- Creating the capacity to collect, manage/preserve and provide access to born-digital collections meeting the current digital standards:
  - Trusted Digital Repository
  - Open Archival Information System (OAIS) Standards
- Developing relationships and collecting policy decisions that encourage the deposit of collections from newer Suffolk communities.
- Managing collections to achieve maximum accessibility for old and new communities and individuals meeting the current standards:
  - PSQG Access Standards
  - Archive Service Accreditation Standard
- Achieving a high proportion of collections with high quality catalogues meeting ISAD(G) standards to
  - develop staff and volunteer knowledge to provide an efficient and well-informed service
  - enable self-guided searching by a diverse range of first time users both onsite and online

- Providing digital access to all collections through collections information on the new website. Describing both analogue and digital collections and scanning popular analogue collections and providing access to surrogate images online alongside born digital material. Therefore, the customer experience is joined up, whether they access material online or on site (see Digital Strategy, Programme 2).

SRO will collaborate with UoS academics and students and SCCAS to:

- Widen the appeal of Suffolk's collections by demonstrating their relevance and developing new ways of using, interpreting and experiencing them.
- Encouraging involvement, collaboration, learning, creativity and innovation.
- Fostering the exchange of knowledge and skills.

The specific Conservation objectives for the collections are to:

- Ensure that the collections are well protected and in stable and suitable environmental conditions whilst in storage, in order to prolong their useable life (in whatever form that use manifests itself)
- Identify and address condition issues throughout the collections by developing a conservation strategy and resource plan. They will be systematic, efficient and affordable. Ensuring that collections in demand can be accessed, whether in surrogate form or in their original form if appropriate.

A summary of conservation strategy is set out in the Conservation Resource Plan at 5.2.



## **5. Action Plans and costs**

### **5.1 Documentation Plan**

#### *5.1.1 What is documentation and why does it matter?*

Documentation is the process of organising an archive collection physically and intellectually, then creating a catalogue which describes the content of that collection. The catalogue clearly explains the nature of the records and reflects their physical and intellectual organisation, bringing out the interrelationships between records. In doing so, helps the user to understand the organisation and activities of the individual or body which generated the records. It will also include information about provenance and biographical/organisational history as context for the records to aid their interpretation. A good archival catalogue enables a user to understand the content of the collection so that the user can identify which records they need to consult. This enables straightforward navigation of material that would otherwise be impenetrable. It is also crucial for supporting exhibition and interpretation planning.

#### *5.1.2 What is the purpose of this Documentation Plan?*

The overriding purpose of this Documentation Plan is to maximise the accessibility of the SRO collections given the resources available. Archives can be complex and/or include large bodies of records so high-quality cataloguing requires considerable staff input. This in turn requires that the SRO carefully prioritises which collections are catalogued.

The Documentation Plan will not remove the cataloguing backlogs at SRO. However, it will reduce this backlog by 5% (or 0.3 of a mile) and focus SRO resources on enhancing the collections information available in a coherent, high utility digital format meeting national standards, and opening it up to a wide range of audiences.

As collections identified in the Documentation Plan are catalogued, they will also be digitised in line with the SRO's digital surrogates policy, their condition, and the SRO's revised digitisation programme.

#### *5.1.3 How has the Documentation Plan been developed?*

The Documentation Plan has been developed by Elizabeth Oxborrow-Cowan, Consultant Archivist, in discussion with the SRO Collections Manager and the Record Office Manager. Each collection in the Plan has been specifically chosen because of its significance and its capacity to contribute to the future work of The Hold. The highest priorities for the Documentation Plan are the 'Notable collections' identified in the Statement of Significance (Conservation Plan, Chapter 4) that have outstanding documentation needs. These are followed by other collections which have been judged to be important for audience development and which demonstrate the richness of the SRO collections.

For each collection the work required to enable that collection to be fully documented on CALM has been specified, the work will differ with each collection but tasks will include:

- Creating a catalogue structure
- Developing new catalogues
- Adding to existing catalogues
- Checking and editing existing catalogues
- Transferring paper catalogues onto CALM
- Checking the work of volunteers
- Specifying closure periods
- Uploading catalogue content to the online facility

For each collection this work specification has then been analysed to assess the personnel type that can fulfil the specification from a choice of:

- Qualified archivist
- Para-professional - a staff member who is not an archivist but is familiar with working the SRO collections and can undertake straightforward cataloguing e.g. searchroom assistants
- Volunteer

The time to document a collection has then been calculated by assessing how much of each personnel type is required to fulfil its part of the documentation and how long the individual collection will take to document based on the number of days' availability of each personnel type i.e.:

- Archivist – 12 days per quarter
- Para-professional - 24 days per quarter
- Volunteers - 120 days per quarter

This duration has then been built into a spreadsheet to create a timetable for when each collection will be catalogued between 2020 when The Hold formally opens and 2032.

A financial equivalent has then been attributed to the annual period of work by each of the personnel types to identify costs or contribution in kind for the Documentation Plan.

#### *5.1.4 Timetable for the Documentation Plan*

The Documentation Plan begins in 2020 when all the collections should have been moved into The Hold. It will not be possible to begin the Plan before 2020 as SRO staff will be completely occupied with preparing the collections for removal (locating, bar-coding, packing) and moving them into the new building. The timetable finishes in 2032.

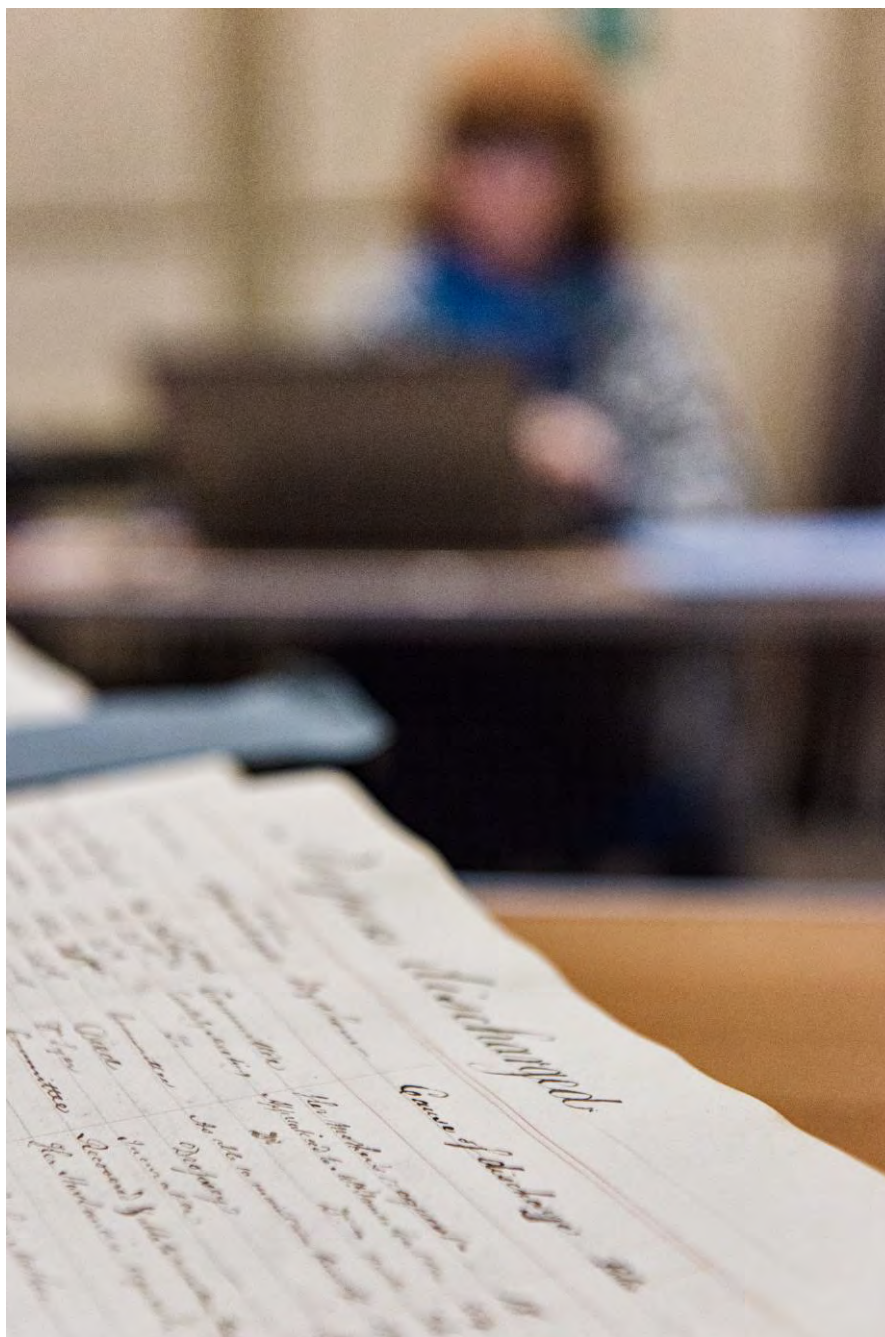
### *5.1.5 Using the Documentation Plan*

The Plan has been developed by NCS in very close discussion with SRO. Its purpose is to be a practical document which SRO will adapt as circumstances change over its 12-year duration e.g. the inclusion of new collections, alterations to the timetable. The Plan is a live document, which will be the key tool for enabling SRO to manage creating intellectual access to its holdings.

### *5.1.6 Documentation Plan personnel requirements and costs/contribution-in-kind*

The table below summarises the resource requirement of the Documentation Plan for each year forecast. The annual personnel requirement has been given a cost equivalent (including time required for archivists to manage volunteers), or benefit 'in kind' for volunteers. Uninflated and inflated scenarios are presented (assuming 3% on staff costs).

The full table given at Appendix 2 lists, for each year, the collections which will be documented alongside the relevant resource requirement.





Annual Documentation Plan personnel costs and contributions-in-kind - uninflated														
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
	£	£	£	£	£	£	£	£	£	£	£	£	£	£
Archivists	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	5,258
Para-professionals	5,435	2,673	0	0	0	0	4,455	0	0	0	89	0	0	0
Archivists managing volunteers (1 archivist day for every five volunteer days)	347	2,315	2,701	0	0	0	502	334	707	0	476	3,215	257	219
<i>Total staff costs</i>	<i>12,254</i>	<i>11,460</i>	<i>9,172</i>	<i>6,472</i>	<i>6,472</i>	<i>6,472</i>	<i>11,428</i>	<i>6,806</i>	<i>7,179</i>	<i>6,472</i>	<i>7,037</i>	<i>9,687</i>	<i>6,729</i>	<i>5,477</i>
Contribution-in-kind from volunteers	4,050	27,000	31,500	0	0	0	5,850	3,900	8,250	0	5,550	37,500	3,000	2,550
Annual Documentation Plan personnel costs and contributions-in-kind - inflated														
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
Staff costs (3% inflation from 2021)	£	£	£	£	£	£	£	£	£	£	£	£	£	£
Archivists	6,866	7,072	7,284	7,503	7,728	7,960	8,198	8,444	8,698	8,959	9,227	9,504	9,789	8,192
Para-professionals	5,766	2,921	0	0	0	0	5,643	0	0	0	127	0	0	0

Archivists managing volunteers (1 archivist day for every five volunteer days)	368	2,529	3,040	0	0	0	635	436	951	0	678	4,721	389	341
Total staff costs	13,000	12,522	10,324	7,503	7,728	7,960	14,477	8,881	9,648	8,959	10,033	14,225	10,178	8,533
Contribution in kind from volunteers	4,050	27,000	31,500	0	0	0	5,850	3,900	8,250	0	5,550	37,500	3,000	2,550

## **5.2 Conservation Resource Plan**

As set out in the Conservation Plan in detail and above at 3.4, a strategy to prioritise conservation operations that addresses the needs identified by the assessment surveys undertaken during 2017, starts in the Delivery Phase as a part of the decant and continues until 2032, this involves:

- A higher quality and better managed storage and searchroom environment in a more protective building provided by The Hold, with collections stored in their most suitable locations and all staff aware of environmental risks.
- Improved levels of housing for collections as part of the decant phase.
- Implementation of routine boxing, cleaning and red rot consolidation of items identified by data gathered during decant preparation.
- A continuing regime of secondary packaging and outer archive boxing carried out routinely as part of accessioning and cataloguing. With increased activity achieved by a growth in volunteer engagement, including:
  - priority programmes of re-housing for freezing plastic photographic materials in line with BS4971:2017;
  - assessment of and response to damaged items flagged up when cataloguing and if requested for searchroom use, requiring ongoing scheduled remedial works and digitisation for access;
  - periodic targeted condition surveys of priority 'project' collections, especially those which are likely to gain external funding support, and follow-up conservation and digitisation works that improve their condition.

To maintain this strategy, the following resource action plan has been identified, covering core resources based on current and future staffing and supplies budgets. Periodic additional grant funding and the input of volunteer support. The plan covers the Delivery Phase as well as 10 full years following the end of the HLF-funded project. Scenarios with staff values inflated and uninflated are presented. The end of the HLF funded project is depicted with a red vertical line.

Conservation Resource Plan - uninflated

Ref	DESCRIPTION	TYPE	RESOURCE																ASSUMPTIONS
				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
-				2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030	2030-2031	2031-2032	2032-2033	
1	Conservation work on maps and decant support	Cash	Freelance conservator - in project budget	£17,500	£17,500														Part-time freelancer appointed Delivery Phase
2	Digitisation tasks for Activity Plan (e.g. SSS maps)	Cash	SRO digitisation team - in project budget	£11,000	£11,000														Backfill digitisation assistant, 18hrs p/w at SCP313
3	Supplies and services for activity plan conservation tasks (including maps)	Cash	Project budget	£20,700	£2,000														Including £12,700 budget line for external digitisation
4	Externally funded conservation work on collections in Documentation Plan	Cash	Zero hours SRO Conservation Team		£9,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	Assumes grant funding is obtained
5	Supplies and services for externally funded conservation work on Documentation Plan collections	Cash	SRO Operational budget			£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	Assumes grant funding is obtained
6	Decant boxing	Cash	Project budget	£70,000	£30,000														
7	Decant surveying and packing support	In kind	SRO conservator	£18,777	£7,511														
8	Conservation for documentation plan collections	In kind	SRO conservator	£7,511	£7,511	£3,755	£3,755	£3,755	£3,755	£3,755	£3,755	£3,755	£3,755	£3,755	£3,755	£3,755	£3,755	£3,755	Inflation from 2020
9	Digitisation of documentation plan collections	In kind	SRO digitisation team	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	
10	Conservation treatments of red flagged material	In kind	SRO conservator		£3,755	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	
11	Monitoring strongroom environment data and conservation records	In kind	SRO conservator	£3,755	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	
12	Exhibition preparation support	In kind	SRO conservator		£3,755	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	£9,389	
13	Volunteer and staff training and support	In kind	SRO conservator	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	£7,511	
14	Surveying, decant packing and barcoding	In kind	SRO archives staff	£94,000	£62,667														SRO 'Closed Wednesday' resources focused on decant/recant. 8 months in 19/20 to allow for snagging.
15	Packaging and boxing of new accessions	In kind	SRO Archives staff	£3,483	£3,483	£3,483	£3,483	£3,483	£3,483	£3,483	£3,483	£3,483	£3,483	£3,483	£3,483	£3,483	£3,483	£3,483	0.33 % of 11hrs pw using SCP29
16	Supplies of boxes and secondary packaging	Cash	SRO Operational budget			£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	Additional contribution from SRO revenue budget
17	Supplies and services of conservation materials and equipment	Cash	SRO Operational budget	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	
18	Surveying of collections condition at intervals as required	Cash	SRO Operational budget							£3,600					£3,600				
19	Conservation, digitisation and decant support	In kind	Volunteers	£71,856	£62,749	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	Based on 19 months of decant/recant work @£50 per day, then 167 hrs per month on MMP @ £150 per day
			total	£345,093	£254,953	£133,037	£133,037	£133,037	£133,037	£136,637	£133,037	£133,037	£133,037	£133,037	£136,637	£133,037	£133,037	£133,037	
			of which cash	£125,200	£75,500	£29,000	£29,000	£29,000	£29,000	£32,600	£29,000	£29,000	£29,000	£29,000	£32,600	£29,000	£29,000	£29,000	
			of which 'in kind'	£219,893	£179,453	£104,037	£104,037	£104,037	£104,037	£104,037	£104,037	£104,037	£104,037	£104,037	£104,037	£104,037	£104,037	£104,037	

Conservation Resource Plan – with staff inflation

Ref	DESCRIPTION	TYPE	RESOURCE																ASSUMPTIONS
				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
-				2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030	2030-2031	2031-2032	2032-2033	
1	Conservation work on maps and decant support	Cash	Freelance conservator - in project budget	£17,500	£17,500														Part-time freelancer appointed Delivery Phase
2	Digitisation tasks for Activity Plan (e.g. SSS maps)	Cash	SRO digitisation team - in project budget	£11,000	£11,000														Backfill digitisation assistant, 18hrs p/w at SCP313
3	Supplies and services for activity plan conservation tasks (including maps)	Cash	Project budget	£20,700	£2,000														Including £12,700 budget line for external digitisation
4	Externally funded conservation work on collections in Documentation Plan	Cash	Zero hours SRO Conservation Team		£9,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	£18,000	Assumes grant funding is obtained
5	Supplies and services for externally funded conservation work on Documentation Plan collections	Cash	SRO Operational budget			£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	Assumes grant funding is obtained
6	Decant boxing	Cash	Project budget	£70,000	£30,000														
7	Decant surveying and packing support	In kind	SRO conservator	£18,777	£7,511														
8	Conservation for documentation plan collections	In kind	SRO conservator	£7,511	£7,511	£3,868	£3,984	£4,104	£4,227	£4,354	£4,484	£4,619	£4,757	£4,900	£5,047	£5,198	£5,354	£5,515	Inflation from 2020
9	Digitisation of documentation plan collections	In kind	SRO digitisation team	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	£13,000	
10	Conservation treatments of red flagged material	In kind	SRO conservator		£3,755	£9,670	£9,960	£10,259	£10,567	£10,884	£11,210	£11,547	£11,893	£12,250	£12,617	£12,996	£13,386	£13,787	
11	Monitoring strongroom environment data and conservation records	In kind	SRO conservator	£3,755	£7,511	£7,736	£7,968	£8,207	£8,453	£8,707	£8,968	£9,237	£9,514	£9,800	£10,094	£10,397	£10,709	£11,030	
12	Exhibition preparation support	In kind	SRO conservator		£3,755	£9,670	£9,960	£10,259	£10,567	£10,884	£11,210	£11,547	£11,893	£12,250	£12,617	£12,996	£13,386	£13,787	
13	Volunteer and staff training and support	In kind	SRO conservator	£7,511	£7,511	£7,736	£7,968	£8,207	£8,453	£8,707	£8,968	£9,237	£9,514	£9,800	£10,094	£10,397	£10,709	£11,030	
14	Surveying, decant packing and barcoding	In kind	SRO archives staff	£94,000	£62,667														SRO 'Closed Wednesday' resources focused on decant/recant. 8 months in 19/20 to allow for snagging.
15	Packaging and boxing of new accessions	In kind	SRO Archives staff	£3,483	£3,483	£3,588	£3,696	£3,806	£3,921	£4,038	£4,159	£4,284	£4,413	£4,545	£4,681	£4,822	£4,967	£5,116	0.33 % of 11hrs pw using SCP29
16	Supplies of boxes and secondary packaging	Cash	SRO Operational budget			£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000	Additional contribution from SRO revenue budget
17	Supplies and services of conservation materials and equipment	Cash	SRO Operational budget	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	£6,000	
18	Surveying of collections condition at intervals as required	Cash	SRO Operational budget							£3,600					£3,600				
19	Conservation, digitisation and decant support	In kind	Volunteers	£71,856	£62,749	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	Based on 19 months of decant/recant work @£50 per day, then 167 hrs per month on MMP @ £150 per day
			total	£345,093	£254,953	£134,269	£135,537	£136,843	£138,188	£143,174	£141,001	£142,471	£143,985	£145,545	£150,751	£148,805	£150,510	£152,265	
			of which cash	£125,200	£75,500	£29,000	£29,000	£29,000	£29,000	£32,600	£29,000	£29,000	£29,000	£29,000	£32,600	£29,000	£29,000	£29,000	
			of which 'in kind'	£219,893	£179,453	£105,269	£106,537	£107,843	£109,188	£110,574	£112,001	£113,471	£114,985	£116,545	£118,151	£119,805	£121,510	£123,265	

### **5.3 Building Management and Maintenance**

SRO will be responsible for the management, maintenance and promotion of the whole of The Hold site in relation to its buildings, operations (including retail), security, public access and Health & Safety.

The partnership between Suffolk County Council (SCC) and the University of Suffolk (UoS) will share the facilities within The Hold that include state-of-the-art collections care and access facilities, meeting the latest standards, and a 200-seat auditorium and seminar rooms for the University, which will be made available for public use.

#### **5.3.1 Design**

Architectural plans for The Hold have reached RIBA Stage 3, and an application for planning approval was submitted in September 2017. The SRO plans to move into the building with a soft opening in Autumn 2019, with a formal opening in Spring 2020.

The Hold underpins the Conservation and Access Policies for Suffolk's heritage collections. The new, state of the art purpose-built storage facilities and workrooms in The Hold will ensure that efficient and effective preventative and interventive conservation is conducted daily by staff, graduate trainees, work experience placements, volunteers, users, visitors etc.

The Hold facilitates:

- Secure delivery and removal of collections from the building.
- Isolation and quarantine of new acquisitions.
- Sorting, air drying, blast freezing and cleaning of new acquisitions.
- Conservation space for the cleaning and repair of rare books and archives.
- Strongrooms for the safe storage of collections.
- Pest monitoring and control
- Repacking of archival materials into acid-free enclosures, other secondary packing and boxes.
- Cataloguing and data inputting.
- Digitisation.
- Environmental monitoring and control.
- Security monitoring and control.
- Ensuring the correct handling of original documents by staff, volunteers, users, visitors etc e.g. by using gloves, book cushions, weights etc as appropriate.
- Maintaining the Disaster Control Plan and emergency preparedness.

The work spaces and infrastructure of The Hold have been designed in consultation with all staff to ensure the facilitation of these activities and will include:

- Secure loading and unloading area at the rear.
- An isolation and quarantine area.
- A sorting room, also for cleaning and packing and blast freezing.
- A fully equipped accessioning and cataloguing room.
- A fully equipped conservation workshop.



- A fully equipped digitisation room with layout spaces, scanners and other digitising equipment.
- A fully equipped office for staff, volunteers, work experience.
- A secure environmentally controlled productions room.
- Fully equipped and spacious invigilated (environmentally controlled) and browsing searchrooms.
- State of the art passively controlled strongrooms and special facilities for storing plastics at -20 degrees C.
- Audio-visual listening/viewing room adjacent to the searchroom.
- Fully equipped Exhibition Room of sufficient standard to support borrowing under the government indemnity scheme, with associated room for the storage of exhibition equipment and packaging.
- Education/learning room to enable groups to interact with original collections in a secure and fully equipped room.
- Associated server and store rooms.
- An integrated security system based on a card access scheme, with presence detectors, book gates and CCTV in appropriate areas.

### **5.3.2 Insurance**

Suffolk County Council (SCC) currently has a combined liability insurance for its buildings and contents for fire, lighting, explosion and impact by aircraft. In addition, SRO has a separate policy to cover the archive materials and records held. The policy will pay for:

- a. The costs of reconstruction, conservation, restoration, repair, cleaning, drying, salvage, disinfestation and all other similar processes if SRO collections are damaged whilst in transit or at any of the named locations as a result of:
  - I. fire (however it is caused, and any resultant damage caused by any extinguishing system)
  - II. lightening
  - III. explosion
  - IV. hurricane
  - V. earthquake
  - VI. windstorm
  - VII. tidal wave
  - VIII. flood
  - IX. aircraft
- b. All risks of physical loss or damage to specified items as per a schedule provided on an 'agreed value' basis for collections of known value because they have been acquired by purchased, under the Government Acceptance in Lieu Scheme, or have been valued by qualified valuers. Owners are encouraged to have their collections valued and provide SRO with a copy of the valuation to pass on to the insurers.
- c. All risks of physical loss or damage whilst in transit, in store or in exhibition for all collections (including those that have not been valued). Where there is no agreed value the archives or records are covered for the costs of conservation etc.

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Compensation for theft, vandalism, damage etc would be negotiated with a Loss Adjuster and would be based on the market value at the time of the loss, as determined by qualified valuers.

‘All risks’, includes:

- I. theft by third parties
- II. unexplained loss or mysterious disappearance
- III. burst pipes or leaks
- IV. accidental damage
- V. vandalism

This separate collection insurance policy will continue when The Hold is operational.

The new building itself, as a unique facility with shared occupancy (SRO and UOS), will be covered by a new, bespoke landlord’s policy to cover risks not covered by the standard SCC buildings policy. The bespoke policy will continue to cover fire, lighting, explosion and impact by aircraft, but also damage by:

- Malicious Persons
- Earthquake
- Storm
- Flood
- Escape of Water
- Impact own vehicle.

A proportion of the cost of the building insurance will be included in the annual financial contribution the University makes towards the running costs of The Hold.

### **5.3.3 Maintenance**

The key elements of maintenance of The Hold have been identified as:

- Inspection
- Cleaning
- Maintenance of Building Fabric & Services
- Glass/Brickwork & Services Plant Replacement.
- Garden and tree maintenance

SCC/SRO currently works with the following suppliers and contractors for the maintenance of its Ipswich Record Office (IRO) buildings and it will continue to work with many of these at The Hold:

- T&P (fire and smoke alarms and emergency lighting)
- SOS (intruder alarm and CCTV) and Custodian Services (Redcare line for fire and intruder alarm)
- Vertas (planned and ad hoc property and grounds maintenance). Vertas work with a variety of sub-contractors, including, but not limited to:
  - Engie (electricity, gas, air conditioning etc. who also sub-contract out)

- Calbarrie (PAT testing)
- Jordan (water including hygiene/testing)
- Churches (fire extinguishers)
- Zurich (lift)
- Suffolk County Council (IT services)
- Waste
  - Ipswich Borough Council - general business waste
  - MMB Environmental - confidential waste
  - PHS - hazardous waste
  - Vertas - recycling

SCC Property/Vertas will carry out a condition survey/general walk-round inspection of the building once a year with the SRO Public Service Manager and complete a maintenance review form. This covers general condition of rooves, gutters, rooflights, brickwork, windows, doors and door frames, ceilings and floors, internal joinery etc. The Public Service Manager will also do a visual inspection once a month.

A fire risk assessment will be carried out annually with the UoS and SCC corporate property are sent a copy.

**The strategy for ensuring maintenance of these elements is set out below:**

Site Constraints · Work Activity/Element	Hazard	Strategy
Roof maintenance/access  Roof ventilation system	Access/Work at Height	<p>Design of roof and access strategy to be developed. Roof to have work restraint cable system.</p> <p>Gutter cleaned from ladder (anchor points on gutter) or from mobile access platform.</p> <p>Long life low maintenance materials to be specified to minimize access frequency. For areas of roof regularly accessed, permanent edge protection to be provided.</p> <p>High level glass replacement strategy to be developed. Design to facilitate access from inside.</p> <p>(All roof glazing to be specified as non—fragile preferably Class A/Type 1 classifications)</p>
Façade maintenance/cleaning especially glazing	Access/Work at Height	<p>Glass/window cleaning strategy to be developed.</p> <p>High level glass replacement strategy to be developed.</p> <p>Ground floor windows cleaned from ground floor (no ladders required).</p> <p>Roof light above archive cleaned from mobile platform internally (strategy to be developed).</p>

		(All roof glazing to be specified as non-fragile, preferably Class A/Type 1 classification).
Cleaning of interiors	Fire risk in strongrooms through use of electrical sockets; tripping hazard through trailing leads	Strongrooms to be cleaned using battery powered cleaners, allowing electrical circuits to be shut down. They will also be cleaned by SRO staff to reduce the risks.  Sufficient low-level electrical sockets elsewhere in the building to minimise trailing leads.
Plant Maintenance/ Replacement	Limitations on access and working space  Operational/Live services Work at Height Lifting operations	Develop Maintenance Strategy based on: (i) BS7543 · Durability of Building Components. (ii) Workplace (Health, Safety and Welfare) Regulations. (iii) Building Regulations · Part N (+ Part K). (iv) HSE Guidance · MISC 611.612.612.61A (Window cleaning) (v) CIRIA <i>Safe Access for maintenance and repair</i> (vi) Work at Height Regulations
High level fittings Lights/relamping including external lights	Access/Work at Height	
Fire Precautions/Testing Maintenance Smoke/heat detectors Fire dampers	Access/Work at Height	
Maintenance of buffer zone	Access/confined space	Buffer space sealed after insulation installed,
Maintenance of refrigerant-based systems.	Refrigerant	Maintenance shall be undertaken by specialist. Pipework generally run externally or in ventilated voids.
Garden, trees and grounds	Possible work at height	Maintenance will be undertaken by external contractor or tree surgeon
Cafe	Fire risk	Maintenance will be undertaken by the sub-tenants/their contractors as part of the concession arrangements.
Lift	Fire risk	Maintenance will be undertaken by specialist contractor.

**Summary table for management and maintenance of HLF-funded items resourced by SRO operational budgets:**

Item funded by HLF	Action	When	Who
Public reception, café, shop, exhibition space, staff workrooms etc, public searchrooms, production area, Education Room, Auditorium, Seminar Rooms, WCs	Cleaning	Daily	Contracted cleaners
Strongroom roller racking	Maintenance	Annual service, and checked daily by staff as used	Roller racking suppliers
The whole building	Fire system maintenance	6 monthly	T&P
	Call points and zones	Weekly	Vertas
	Emergency lighting	Weekly, monthly & annually	T&P
	Luminaires and exit signs in good condition	Daily	Staff
The whole building	Fire extinguishers	Daily Annually	Staff Churches
The whole building	Security system maintenance intruder alarm	Annual full service intruder alarm 6 monthly Redcare maintenance Annual maintenance CCTV Annually Card access system	SOS and Custodian Services (Intruder Alarm and CCTV, BT Redcare)
The whole building	Electrical, air-conditioning and gas maintenance and electrical equipment	5 yearly fixed electrical installations Annual PAT testing	Engie  Calbarrie
The whole building	Boiler	Annually	Engie
The whole building	Lightening conductors	9 monthly	Engie
The whole building	Glass, windows and external maintenance	Annual	Vertas
The whole building	Water hygiene	monthly	Vertas
		Annually	Jordan

	Water hygiene major visit and minor visit Legionella testing Servicing and descaling of water heating boilers	6 monthly Biannually	Jordan Jordan  Jordan
The whole building	Lift maintenance and servicing	2 monthly	Zurich
The whole building	Rodent and pest monitoring	Daily look out by all staff	Conservator will monitor insect traps in the strongrooms, problems reported to Vertas, expert sub-contractors called in as necessary
Conservation	Fume cupboard Chemicals COSSH	Annually  Annually	
Exhibitions	Maintenance and rotation of exhibits	As required	Collections team with external contractors as necessary
Signage and interpretation panels	Cleaning and maintenance	Quarterly	Contracted cleaners overseen by permanent staff
The whole building	Fire exits, escape routes and doors, clear and available for use Fire door seals good and self- closers working Fire panel working and showing normal	Daily  Monthly  Daily	Staff
Garden	Cleaning and maintenance	Daily More major maintenance work quarterly including 2 leaf clearances Annual tree safety checks	Volunteers Contracted gardeners

### 5.3.4 Operational arrangements with the University of Suffolk

The Hold is the headquarters of the Suffolk County Council's Record Office and in corporate management terms falls within the Resource Management of the local authority. As such, The Hold, as a County Council-owned facility will be managed on a day to day basis by staff of the Record Office headed by the Record Office



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Manager. In terms of line management, he/she will report to the Director of Strategic Development.

As landlord for The Hold, SCC will assume responsibility for building operations and maintaining and managing the contracts with suppliers in relation to all aspects of facilities management. The University of Suffolk will contribute to the ongoing management and maintenance costs through an annual service charge, which SCC will levy as landlord of the building. The mechanism for this charge is enshrined in the sub-lease for the building, by which SCC leases the auditorium and seminar rooms to UoS (reserving rights of access for SRO-related activities outside agreed teaching hours). The annual service charge will, in the first instance, be based upon a proportional share of costs based on the size of the rooms for which UoS will be the main user e.g. the auditorium and seminar rooms, with that percentage then applied to the shared spaces e.g. the reception area, circulation spaces, WCs etc. to calculate a final percentage upon which the annual service charge will be based.

The design of floor areas for The Hold indicates this percentage will be in the region of 30% and this is what has been reflected in the Business Plan, which includes the annual payment from UoS as 'income' for The Hold, impacting the ultimate 'bottom line' SCC subsidy to the SRO service.

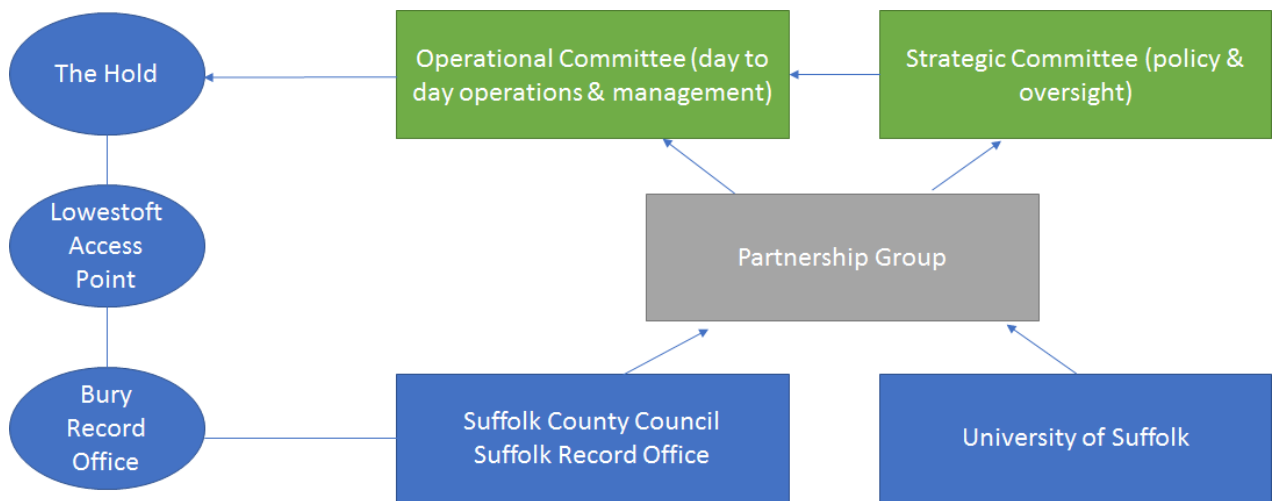
The charge will be reviewed annually by the Operations Committee to ensure it reflects a fair apportionment of cost commensurate with use.

***'Strategic' and 'Operations' Committees for The Hold***

Given the close strategic and operational relationship with the University of Suffolk, a Partnership Group between the County Council and the University will be formed. Its written terms of reference will reflect the key elements of the formal agreement between the two parties. The Partnership Group will consist of a Strategic Committee and an Operations Committee (see diagram below) and will be put in place to succeed the current project management arrangements.

The Strategic Committee will consist of elected members and senior University staff and be chaired by a SCC member. It will meet initially on a four-monthly basis and monitor progress against the aims and objectives of the formal agreement between the SCC and the UoS.

The Operations Committee will consist of SCC officers with responsibility for the management of the SRO and The Hold and University staff with academic and administrative interests in The Hold and be chaired by a senior SCC manager. The Operations Committee will provide a forum to discuss any day to day, operational matters of mutual interest/concern between the SRO and the University. It will meet monthly and will act as the executive arm of the Partnership Group (Strategic Committee).



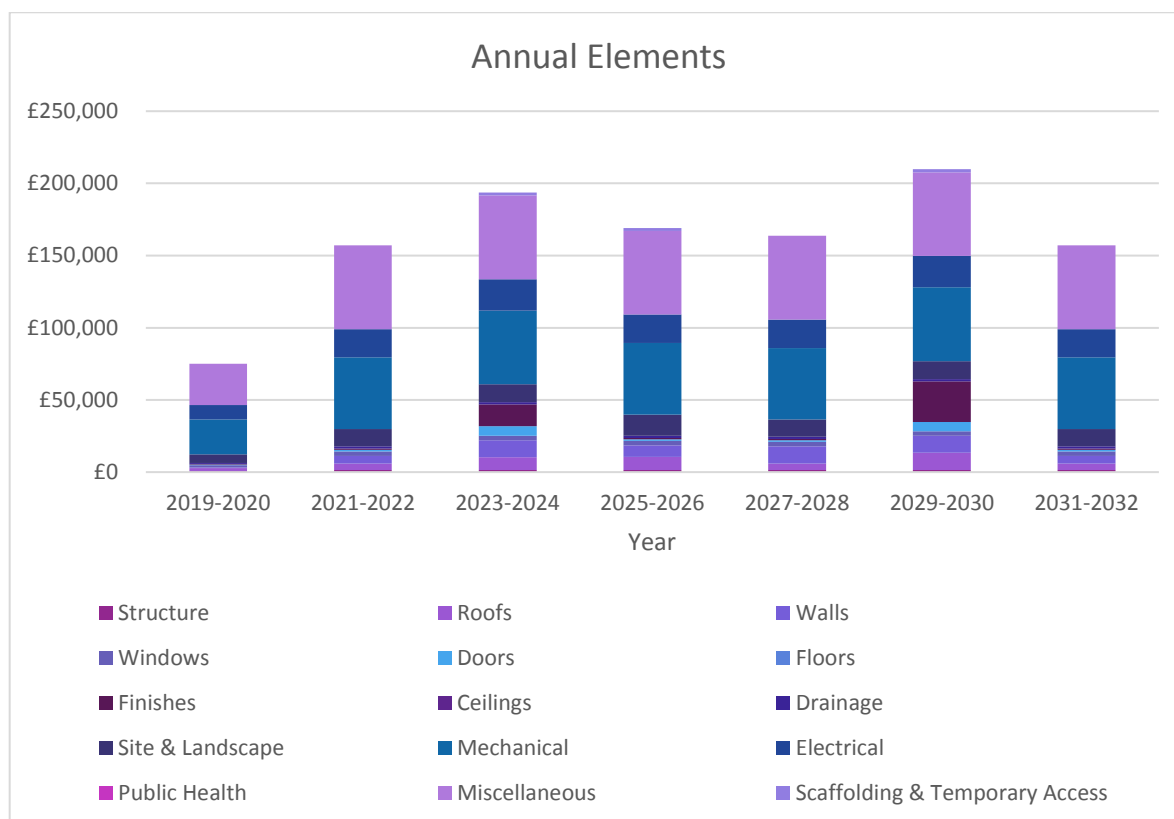
### 5.3.5 Costed Management and Maintenance Plan for The Hold

A detailed 10-year Management and Maintenance Plan for the new building is provided at Appendix 3. Cost elements have been established from the Stage 3 Cost Report for The Hold, with Year 1 expenditure values and future forecasts modelled on BCIS<sup>3</sup> rates for the 4th Quarter of 2019. The costs were sense-checked against the estimates produced by the Business Planners (Fourth Street) for The Hold in comparison with other similar venues.

The costs are carried forward into the cash flow summary within the Business Plan (see Business Plan, Figure 39, p54), the bulk falling under the SRO 'premises' cost heading, with some more specialist tasks (e.g. roller racking service contract) falling under the 'supplies and services' cost heading. Peaks in management and maintenance expenditure can be observed in 2024 and 2029 which relate, for example, to typical renewal cycles for floor and wall finishes.

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<sup>3</sup> BCIS = Building Cost Information Service of the Royal Institute of Chartered Surveyors



### 5.3.6 Staffing (building)

#### **Site Manager/Public Service Manager**

The full-time Public Service Manager will supervise all staff functions relating to the day to day operations and maintenance of the building, garden and grounds including being responsible for their security, on-going maintenance and care. They will be supported in this by SCC's main contractor Vertas, custodial and cleaning staff etc. They will draw up daily and weekly rotas for the supervision of the searchrooms (Invigilated and Browsing), strongroom productions and the supervision of the reception point/shop/exhibition space by the Searchroom Assistants and Volunteers. They will be generally responsible for daily users enquiries and support. The Public Service Manager will also be responsible for ensuring/monitoring the general performance of the building, gardening and cleaning staff and drawing any defects to the attention of their contract managers.

The Public Service Manager will be responsible for ensuring that all legal consents and/or licenses are in place relating to the operating of the site for public benefit and that workmen visiting the site to carryout routine maintenance and repairs have completed all the necessary paperwork.

#### **Volunteers**

It is recognised that there will be an increased need and opportunity for volunteers to help with the workload of The Hold. As detailed in The Hold's Activity Plan, volunteers will be recruited from local heritage groups, university students and other

target communities including older people, people with disabilities and young people. They will contribute in a number of ways including assisting the transfer of the collections to the new site, working at the reception point/shop/exhibition, supporting collections conservation/preservation by improving packing, data inputting, cataloguing, research work associated with exhibitions, conducting surveys and evaluations and gardening. The redevelopment will increase opportunities for volunteering for a wide variety of local people.

### ***Archivists and Conservator***

Archivists and the conservator will be responsible for:

- Archival management and service delivery, including maintenance of standards.
- Environmental monitoring and management, including liaising with air-conditioning engineers, pest management services etc.
- Line management of interns, work experience etc.
- Volunteer supervision for accessioning, cataloguing etc of the Archives.
- Management of cataloguing and digitisation projects.
- Maintenance of the archives management system.
- Management of archival accessions.
- Preservation, conservation and security of archival collections.
- Maintenance of the Disaster Control Plan and emergency preparedness.



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## **5.4 Management and Maintenance of Exhibition and Interpretation Elements**

The Hold will be a visitor attraction showcasing, and enabling visitors to interact with and enjoy, Suffolk's unique heritage. For the first time, SRO will have a dedicated Exhibition Room that will interpret collections for visitors enabling interaction with them. This will be of a sufficiently high standard to enable SRO to borrow<sup>4</sup> items from national institutions e.g. The National Maritime Museum, or regional collections, to show in an annual 'blockbuster' exhibition alongside Suffolk's material (see letters of support at Appendix VII to the Exhibition and Interpretation Report – Supporting Document 10). It will have separate, flexible environmental control systems enabling SRO to bid to take national travelling exhibitions too.

### **5.4.1 Design (exhibitions)**

The Exhibition Room also provides a venue for a rolling programme of SRO-curated and community-generated exhibitions linked to the Activity Plan. These may display SCCAS small finds, which have never been exhibited before, alongside archives from SRO, archaeology and new material coming in as a result of contemporary collecting. There will be regular displays of archives from the collections and the stories generated by the 'Sharing Suffolk's Stories' community research projects (see Activity Plan, Chapter 6, activity 1.9).

The Hold will also be the base for a touring exhibitions programme. Parts of the community exhibitions and displays will travel around the county to other suitable venues including; schools, community centres, cultural venues and festivals, museums, or libraries. Social media will be used to tell local people about the exhibitions in their area, and to discover and provoke discussion on further stories related to the theme of the exhibition. Each exhibition will have an online element published via the [suffolkarchives.co.uk](http://suffolkarchives.co.uk) website and will link to other events and activities e.g. talks, workshops, conferences etc. Some exhibitions will be part of a larger whole, linking across venues in Ipswich and beyond e.g. in partnership with Colchester and Ipswich Museums Service or Sutton Hoo.

In addition to the dedicated Exhibition Room, there will be other display spaces around the building e.g. in the café and reception area. The exhibition design team have identified potential walls, ceilings and floors, particularly in the 'welcome' areas, which present opportunities for story-telling and points of interest for the visitor, encouraging them to progress through the building.

Each such interpretation 'point' combines a mix of some or all of the following; specialist lighting, set works, graphics, mounts, interactives and AV elements. SRO will need to manage and maintain these points in the future in addition to the maintenance of the Exhibition Room. At these points, visitors will come across the collections and learn just how rich and unexpected the information discovered can be and will be encouraged to start their own voyages of discovery. Media screens,

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<sup>4</sup> SRO plans to borrow items to exhibit under the Government Indemnity Scheme, where applicable. This dictates that a high standard of security and environmental control must be met.

touch tables, oral history benches/pods, interactives, and apps will help them to engage with the collections in a fun and informal way and self-drive. They will be able to find out more about items that have just been catalogued, digitised, or put on exhibition.

#### **5.4.2 Staffing (exhibitions)**

The whole SRO team will contribute ideas for an annual exhibition programme, taking into account the Conservation and Activity Plans, and in consultation with partners, especially UoS, stakeholders and users. They will also consider upcoming international, regional, and local events and celebrations. SRO will appoint a full time Exhibition and Interpretation Officer during the HLF Delivery Phase, 6 months ahead of the building opening. The post will be a permanent addition to the SRO staff structure. They will be responsible for overseeing the management and maintenance of the exhibition/interpretation infrastructure, as well as the programme of shows for the year.

The Exhibition and Interpretation Officer (from Spring 2019) will take the lead in all aspects of exhibition and interpretation development, monitoring the operation, maintenance, and replacement of all displays, and supervising the care of material on display or in transit. They will lead on applications to external bodies (including nationals) for the loan of special objects for exhibitions. For touring exhibitions, the Exhibition and Interpretation Officer will work closely with the Community and Learning Officers to determine the best method of replicating elements of the main shows at The Hold at other venues, often by means of a co-created display with community groups.

The Public Services Manager for The Hold and their searchroom team will assist the Exhibition and Interpretation Officer in ensuring the exhibition room and display points are cleaned, inspected and the AV elements tested on a regular basis, as identified in the plan at Appendix 4.

Elsewhere, the Exhibition and Interpretation Officer will be supported by:

- Volunteers, interns, work experience placements and staff carrying out the research required and writing captions, and associated materials e.g. a newspaper, leaflet, or information to go on the website etc. This group will also help to run associated events in The Hold and across the county and to evaluate them. They will receive training in exhibitions' curatorial, production and technical skills and will invigilate the exhibitions room and be on hand in the reception area to answer questions about the exhibitions in other parts of the public spaces.
- Conservator to survey/assess and prepare items for display, including those brought in as loans, or being loaned or being digitised

- Digitisation Assistants to improve accessibility, by digitising archives to be included in online exhibitions on the [suffolkarchives.co.uk](http://suffolkarchives.co.uk) website, in interactives etc.
- Marketing and Communications Officer to ensure effective marketing of the exhibition and interpretation programme.
- Community and Learning Officers in delivering community-based displays and touring exhibitions.
- Partner organisations e.g. The National Maritime Museum, Museum of East Anglian Life, Hadleigh Archives, etc.
- UoS Arts Curatorial Programme students will support the curating, exhibition planning, and hanging in the UoS Gallery and The Hold. One of them will act as the Gallery Director for some exhibitions.
- Volunteer Engagement Coordinator to recruit the diverse body of volunteers necessary to deliver the exhibition and interpretation programme.





### 5.4.3 Exhibition management

Exhibitions will continue after the HLF funding has ended. Some will be charged for, especially those of regional or national significance, to cross-subsidise a range of smaller, free exhibitions and associated activities. The SRO's Funding Officer will explore and approach potential exhibition sponsors to ensure the future sustainability of the exhibition and interpretation programme. Grants will be applied for with appropriate partner organisations to cover the transport, insurance, conservation, security, and environmental requirements in particular of borrowing objects from other collections.

To enable protection of items and, where applicable, ensure coverage under the Government Indemnity Scheme (GIS) can be secured, SRO will operate to high professional standards in terms of transport, security, and environmental conditions as well as those governing food and drink in the exhibition space. Items borrowed will either be insured under the GIS or under an extension to SCC's archive materials and records insurance policy. SRO will comply with *Government Indemnity Scheme Guidelines for non-national institutions - Arts Council England* (January 2016) <http://www.artscouncil.org.uk/protecting-cultural-objects/government-indemnity-scheme>

Condition assessments/surveys with photographs will be made before any items from SRO collections are loaned to other organisations for display against which they will be checked on return. Loan procedures and agreements will ensure items loaned are handled, transported, displayed, and stored securely and appropriately without damage to the loan item. SRO will expect to enter into similar arrangements for any items it borrows and will examine and record the condition of items borrowed on receipt and again before they are returned. It will follow best practice described in *Loans Between National and Non-national Museums New Standards and Practical Guidelines National Museum Directors' Conference* (2003) See [https://www.nationalmuseums.org.uk/media/documents/publications/loans\\_standards\\_guidelines.pdf](https://www.nationalmuseums.org.uk/media/documents/publications/loans_standards_guidelines.pdf)

Original archives and local studies materials will not be put on permanent display. An initial visual inspection will be made by SRO Collection Team staff during the first phases of the selection of items for possible display to ensure only material that is suitable is used. If its decided to use an item, it will be properly assessed, and a condition report made, and any remedial work carried out before it is put on display or digitised, so a digital surrogate can be exhibited instead.

The impact on the items to be displayed by the environment in which they will be displayed will be calculated to understand the safe level of light exposure and therefore length of display. Light levels will be set according to the sensitivity of the items to be displayed to reduce discolouration and fading. The standards recommended in *BS4971:2017 Conservation and care of archive and library collections* will be followed. For most archive materials the temperature will be maintained within the range of 13-22 degrees C with an average annual temperature of less than 18 degrees C, whilst the RH will be maintained below 60% but not less than 35%. The Conservator will continuously monitor, record, and report to the Record Office Management team and the Exhibition and Interpretation Officer on the

environmental conditions in the exhibition room and cases, to protect the items on display and to exchange with institutions SRO has borrowed items from or wishes to borrow from in future.

The strategy for the exhibition room fittings and furniture, temporary exhibitions equipment and the spaces available elsewhere in the building will be based on reusability and flexibility. The lighting strategy for the exhibition spaces within The Hold uses multiple sources for flexibility, as well as for control for more sensitive objects. The exhibition room uses mounted track systems, ceiling grids, adjustable spot lights, interchangeable lenses, floor boxes etc. Pods, tables, boxes, screens etc for use in the travelling exhibitions will be designed for ease of setup, take down and transportation as well as reuse and have been trailed during the activity plan pilots. The interactive touch tables, benches etc will be designed for ease of loading new material by staff as well as use by the public.

Research carried out for the Activity Plan indicates there are items within the 'Notable collections' in particular that are likely to be in demand for many exhibitions, events etc. They will be assessed and an annual 'light' budget set for them and a digital copy made to help ensure they are not over exposed.

Flexible, secure, sealed display cases with anti-bandit and UVA filtering glass will be used to display original archives, whilst upright cases will have easy access from the sides. Very specialist cases will be hired as required. A variety of supports, packing and conditioning materials etc will be developed and retained for re use in the exhibitions store.

A costed 10 year Management and Maintenance Plan for The Hold's exhibition/interpretive plans is provided at Appendix 4.



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## 5.5 *Management and Maintenance of Digital Features*

The Hold seeks to engage existing and new audiences with Suffolk's archival heritage in the most technologically exciting ways possible. The digital ambition for The Hold (and SRO more widely) is identified in the Digital Strategy as follows:

“Digital media and technology open Suffolk's archives to its local, national, and international communities. Digital helps to reach out to them, involve them, and give them ownership of their history and heritage, easily, accessibly, brightly and brilliantly, and with an eye on the future.”

This ambition forms the basis for the strategy and the programmes developed therein – and also for moving SRO forward as an archive service ‘for the 21<sup>st</sup> Century’. The ambition will be achieved through a blend of online programmes, digital interactives within the building (e.g. exhibition/display AV), and through provision of high quality IT devices and tools for customers to use throughout their visit.

The Digital Strategy for The Hold brings these elements together into one cohesive document, which identifies 6 main digital programmes for The Hold, developed in close consultation with SRO, stakeholders, and the Activity Plan consultants. It also identifies the underlying supportive digital technology that underpins them.

### 5.5.1 Design (digital)

#### ***Online/virtual***

The online/virtual programmes identified in the Digital Strategy which will require ongoing SRO resource (staff and budget) to manage and maintain are as follows:

#### **‘Normalise the archives with The Hold’s “Personal Digital Assistant” (PDA)’.**

A series of digital services to normalise the archives, enhance accessibility, and ensure digital hospitality for all SRO audiences, from first timers to advanced users. Together, these services will form The Hold’s ‘Personal Digital Assistant’ (PDA).

#### **‘Open up the online collection to the world’.**

The Hold will make more of its collections more easily accessible online to (international) audiences to encourage and facilitate discovery, and to entice online visitors to start their own research. This will include revising the SRO’s existing digitisation programme.

#### **‘Create a citizen archive of contemporary Suffolk life’.**

The Hold’s storytelling and contemporary collecting activities will create a record of early 21st century Suffolk life, as well as complement the existing collections with stories and context. These activities will connect The Hold with specific communities

in the county and beyond, to make sure everyone feels represented in the archives. This digital programme is very closely aligned with the Activity Plan.

**‘Develop and optimise digital-first processes and revenue generation’.**

The Hold will transform all its relevant internal and external processes to be digital first, and optimise these to ensure the organisation’s sustainability and revenue generation.

The resource requirements of these programmes have been carried forward into Appendix 5; the 10 year costed management and maintenance plan for digital features.

***Building***

The following digital interactives within the building will require regular maintenance as part of ongoing exhibition/interpretation maintenance, and the cost of doing so has been calculated and carried forward into future SRO operational budgets, as expressed in the Business Plan. These costs are shown in detail at Appendix 4:

<b>Theme/area in building</b>	<b>Nature of AV element</b>
‘Port’ an interpretive experience just inside both entrances to the building	Sound cones x 2
‘Mapping Export’ – beside the café area	Large AV screen, showing film
‘News’ (just left of the shop/reception area)	Digital projection of changing info onto AV screen
‘Exchange’ display wall beside internal steps to searchroom	Sound drawers which play music/oral history recordings when opened
‘Search’ – interactive tables outside the searchroom	Some of these tables will have tablets/media units set into them - which could be used for The Hold’s PDA & interactive collections catalogue
‘Wonder’ – the wonder wall, mapping and vernacular architecture themes	Audio benches x 3 A screen/projector may also feature in final proposal

Furthermore:

- Hardware, including interactives and digital elements of the exhibitions, needs to be replaced or require serious maintenance every 5 years.
- Software needs to be replaced more or less every 5 years. This does not apply to subscriptions. Also, every 5 years, the choice for software needs to be evaluated to see whether it still lives up to expectations.



- For software, SRO will have a support contract with the (web) developer including monthly updates of the software, bug fixes, and a ticket system for adding additional functionalities
- External services such as Preservica need to be evaluated every 2 or 3 years to check whether the service keeps on updating its software. If development stops, it may be a good time to change to another service. Specialists can help SRO with this evaluation.
- Interactives require a very easy CMS to ensure SRO staff, overseen by the Exhibition and Interpretation Officer, can easily refresh and change content.

### ***Supporting infrastructure***

The Digital Strategy identifies that within the building itself, the focus will be on the physical experience which will be subtly supported by digital technology (e.g. Wi-Fi) to make it more welcoming and engaging. From a digital perspective, there are three levels of access to the building:

- Public spaces. These spaces support visitors to use their own devices (BYOD<sup>5</sup>), low-level engagement with the exhibitions and collections, and deeper engagement through the PDA and website. All spaces have at least this level of digital support.
- Spaces with limited access. This includes the searchroom, auditorium, education room, etc. In these spaces, specific technology will support the core functions of the space. When needed, access to the space is controlled with handheld devices.
- Office spaces. In the offices, the digital support is complemented with dedicated technology and software to support daily operations.

The physical border between these spaces will be hybrid. Staff can use handhelds (smartphones or dedicated tools) to verify tickets or sell access to events.

### **5.5.2 Staffing (digital)**

The management and maintenance of The Hold's digital infrastructure will, at basic level, form part of regular building maintenance and facilities management (e.g. maintaining Wi-Fi and network points is simply a part of day to day building operations). Other, more specialist digital features are incorporated into the management and maintenance of exhibition and interpretation (e.g. AV elements).

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<sup>5</sup> Bring Your Own Device

However, the maintenance of the digital *programmes* and supporting technologies identified in the Digital Strategy will be the responsibility of the whole SRO workforce. The PDA / live chat function requires full time attention (i.e. someone is on call to answer possible questions), but not a full-time position. PDA responsibilities will be combined with, for instance, help desk or hospitality responsibilities. Alternatively, volunteers could help to manage the PDA from their homes. Required staff resources are reflected in the costed Management and Maintenance plan for digital at Appendix 5.



SRO posts with the strongest elements of responsibility for digital are as follows:

Post	Digital Responsibilities
Community and Learning Officers	<p>Ensure that a range of activities, resources (including digital) and events are programmed for delivery at the new heritage facility <i>The Hold</i> and the whole of SRO. The programme is to be developed to ensure there are extensive digital outcomes resulting in the Citizen Archive and online and social media engagement.</p> <p>Help coordinate the SRO's use of social media, the Citizen Archive and website to build interest in the programme, raise the profile of the SRO, increase participation, and recruit volunteers.</p>
Marcomms Officer	<p>Develop the digital/online content strategy of The Hold and ensure all content is created by the SRO team, volunteers, and the various stakeholders of the Hold.</p> <p>Manage the development, maintenance, and moderation of the website, online collection, and Citizen Archive.</p> <p>Take the lead in the digitisation, optimisation, and monetisation of existing processes of The Hold and the development and use of the CRM.</p> <p>Develop and manage the digital capacity building activities and digital design challenges of The Hold.</p> <p>Ensure all digital activities contribute to audience development and digital community building.</p>
Exhibition and Interpretation Officer	<p>Ensure links between The Hold's exhibitions and the online presentations on the website and online platforms are maintained.</p> <p>Commission, produce (where required) and select content for exhibitions and related digital products (including web-based for online exhibitions and resources).</p> <p>Help with the delivery of the Citizen Archive to ensure the story telling is engaging and appropriate for digital communities.</p>
Volunteer Engagement Coordinator	<p>Responsible for the volunteer-related elements of the audience development and community building activities, as well as enabling volunteers to be content creators for social media and the other elements of the digital content strategy.</p>
Collections Team	<p>Responsible for developing collections-based social media and website content, including online exhibitions, online quests, and helping manage the 'live chat' function of the PDA. Responsible for ingesting digital content into Preservica (long-term digital preservation system).</p>
Searchroom Team	<p>Responsible for helping manage the 'live chat' function of the PDA, helping to digitise SRO processes. Checking interactives on a regular basis and refreshing content.</p>



Management Team	Overall responsibility for digital capacity building in the team. Will revise Digitisation Programme in line with Activity Plan objectives and Documentation Plan priority collections.
Digitisation Assistants	Responsible for digitisation of original documents in line with revised Digitisation Programme

## 6. Review

This Plan will be formally adopted by Suffolk County Council Strategic Development Management Team on date to be confirmed.

SRO's Manager (and future Manager of The Hold) will be responsible for monitoring and reporting on performance. Overall responsibility for implementing and reviewing the Conservation Plan lies with the Suffolk Record Office Management Team.

The Plan will be reviewed annually by the SRO Manager through a process of consultation with staff and key stakeholders. A strategic review will take place every five years following more extensive periodic condition surveys.

The Plan will be published at [suffolkarchives.co.uk](http://suffolkarchives.co.uk) and a link will be sent to The National Archives, The East of England Regional Archive Council, Suffolk Archives Foundation, Suffolk Record Office Collections Advisory Committee, University of Suffolk Department of Arts and Humanities, Suffolk Strategic Heritage Forum, Suffolk Record Office staff and volunteers.

## 7. Bibliography

The list below summarises the most useful documents for the management and maintenance of The Hold and SRO. The MMP has been informed by several collection surveys which are amended as Appendix 5 to the Conservation Plan and the Full Risk Analysis held in Appendix 2 of the Conservation Plan.

The Action Plans have been developed to enable SRO to comply with the following standards:

- Archive Service Accreditation, 2013 – externally validated UK standard for archive services to promote good management and effective and efficient service delivery <http://www.nationalarchives.gov.uk/documents/archives/archive-service-accreditation-standard-june-2014.pdf>
- International Standard of Archival Description [ISAD (G)], 2nd edition, 2011 - international standard for cataloguing archives published by the International Council on Archives <https://www.ica.org/en/isadg-general-international-standard-archival-description-second-edition>  
EN 16893:2018 Conservation of Cultural Heritage - Specifications for the Location, Construction and Modification of Buildings or Rooms Intended for the Storage or Use of Cultural Heritage Collections
- BS PD5454:2012 Guide for the Storage and exhibition of Archival Materials
- BS 4971:2017 Conservation and Care of Archive and Library Collections
- EN 16095 Conservation of Cultural Property - Condition Recording for Moveable Cultural Heritage
- PAS 198:2012 Specifications for Managing Environmental Conditions for Cultural Collections, BSI
- PAS 197:2009 Code of Practice for Cultural Collections Management, BSI
- Benchmarks in Collection Care 2.0, MLA 2011
- Knowing the Need - optimising preservation for library and archive collections, British Library, 2013

N.B. “EN16893 Conservation of Cultural Heritage New Sites & Buildings Intended for the Storage & Use of Collections” and “BS4971 Conservation & Care of Archival Collections” are being brought in in 2018 as the replacement for “PD5454:2012 Guide for the storage and exhibition of archival materials” and “PAS198 Specification for managing environmental conditions for cultural collections”.

As one of the MMP authors is closely involved in these two new standards these new standards have informed the MMP.

## **Appendix 1 - Decant and Recant Plan for Suffolk Record Office Archive Collections**

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# Decant and Recant Plan for Suffolk Record Office Archive Collections

## 1. Executive Summary

The National Conservation Service (NCS) Decant and Recant Plan has been undertaken as part of the HLF funded Development Phase work, for the Suffolk Record Office (SRO) 'The Hold' project, which aims to deliver a new heritage facility for the people of Suffolk.

The Decant and Recant Plan outlines the timetable and provides an overview of the tasks and resources required to move archive collections into the new facility. A shelf survey at Ipswich Record Office was undertaken (Appendix A) and the information gained has been used to underpin the task analysis and timetable. The shelf survey identifies what media are stored where at Ipswich Record Office (IRO) and will complement the more detailed shelf analysis that is being conducted by SRO staff and is due to be completed after the decant plan has been finalised. The shelf survey also provides information on the type and format of the archive packaging required for the move and this information has informed the development of the Project Streams (PS).

The Decant and Recant plan has identified 9 PSs:

1. Collections management
2. Finding aids and reference material
3. Managing the move to The Hold (IRO, LRO and BRO outstore and County Archaeology Archive (CAA))
4. Local studies material
5. Phase boxing project
6. Rolls storage and re-packaging
7. Archive re-packaging
8. Photographic media
9. Barcoding

Each PS a list of associated tasks which are divided into 4 sub-phases. A chart providing a timetable of the PS has been developed. The requirements of barcoding and transportation brief headings are summarised and listed as part of the PS and phased project management. The timetable will be used with Appendix B to inform the more detailed planning by SRO Management, collections and decant recant team.

## 2. Introduction

The National Conservation Service (NCS) Decant and Recant Plan has been undertaken by Collections Management Consultant, Helen Lindsay, ACR as one of a suite of assessments undertaken by NCS, as part of the HLF funded Development Phase work, for the Suffolk Record Office (SRO) 'The Hold' project which aims to deliver a new heritage facility for the people of Suffolk. The other reports include the Map Survey, Conservation Plan and Management and Maintenance Plan.

As outlined in the brief, the Decant and Recant plan includes information on the following:

- Information to support the scale and range of collections in the room assessment.
- Information on the extent of packaging protection recommended for transportation.
- An overview of the time scale for the decant and recant.
- A review of the issues relating to barcoding.
- Information on the standards for packaging and transportation.
- Key functions of the actions required prior to the decant in the form of identified PS and the phased programme of work.

### 3. Quantifying the transfer

The majority of archive material to be moved is at IRO in two large strongrooms. The material is also stored in mobile shelving in the education room, microfilm room, searchroom and map room.

Local studies material at IRO is stored in several locations: in the strongrooms, education room, microform room and searchroom. Most of the local studies collection consists of printed books although there are also pamphlets, journals, newspapers and maps. It is estimated that the IRO and LRO local studies material amounts to c 88 m<sup>3</sup> shelving. (There will also be some local studies stock to move from LRO to The Hold.)

The current project to carry out a Shelf Analysis will provide more detail and confirm overall quantities of material in the strongrooms. The resulting data will provide information on the numbers of each size of box, plus how many volumes, bundles and rolls are stored loose on the shelves. This information will prove invaluable to the development of a brief for the move, the re-packaging projects and calculating the numbers of items to barcode. It would be useful to carry out a follow-up project to include all the material in the searchroom, education room, microform room and map room on the Shelf Analysis so that they can also be included in the estimates.

In addition to the material in Ipswich, there are archives at an off-site store in Bury St. Edmunds, consisting of 508 shelves (81m<sup>3</sup>), 1079 shelves (112m<sup>3</sup>) at Lowestoft, and 10m<sup>3</sup> of Archaeology Archives in Bury which will also be included in the move.

The room assessment for decant in Appendix A provides an overview of the general issues in each room. It offers a route map for the first set of tasks which could be carried out to re-package parts of the collections in preparation for the move. Detailed information is not required for all activities, for example, transferring documents from ring-binders to archive folders and boxes could be carried out without a comprehensive project plan or large investment in archive packaging.

#### **Summary of space**

Location	Collections – June 2017	Estimate for move
Ipswich Record Office archives	922.48m <sup>3</sup>	1044m <sup>3</sup>
IRO and LRO Local studies material	88m <sup>3</sup>	88m <sup>3</sup>
Lowestoft Record Office archives	112.44m <sup>3</sup>	115m <sup>3</sup>
Bury Record Office outstore archives	81m <sup>3</sup>	81m <sup>3</sup>
County Archaeology Archive	10 m <sup>3</sup>	10 m <sup>3</sup>
		<b>1411m<sup>3</sup></b>



## 4. Assessment by room – key findings

### 4.1 Resources

The amount of staff time and archive packaging needed to complete the actions listed below can only be estimated in detail once the information on formats has been collected via the shelf assessment. Some tasks will require considerable amounts of staff time and packaging while others are relatively light on packaging costs (e.g. local studies activities) and therefore could be started first. The actions listed in the PS that include re-packaging need to be completed before material is barcoded.

In general, the order of decision making is:

- Quantify formats (volumes, local studies material, etc) via the shelf assessment.
- Adopt approaches for specific formats (phase-boxing, ring-binders, etc).
- Prioritise and develop programmes of work based on the PS.

Some work has been done on assessing potential core staff availability for the decant project from right across SRO, taking into account absences for leave, sickness, training etc. This equates to about 108 hrs a week costing, inclusive of on costs, about £1799 per week or £93,805 pa.

In addition, the SRO Conservator will spend approximately 50% of his time on this activity during 2018/19 (18.5 hrs a week, £18,777). In 2019/20 the commitment of this role will reduce as more work will be required on the preparation of materials for exhibition and display.

Digitisation work that might be carried out in conjunction with the decant recant project amounts to about 23 hrs a week costing, inclusive of on costs, £256 per week and £13,326 pa.

NB A Freelance Conservator will be employed on a part-time basis over two years to work on both the maps in Sharing Suffolk Stories Activity Plan and the decant recant project (£35,000 in total inclusive of on costs across two years). They will spend approximately the first 14 months of their contract on the maps project and the remaining 10 months of their contract will support the decant recant project. (This post would start in April 2018 and end in March 2020.)

Other resources to help with the boxing, packing, and barcoding of the collections prior to the move and with the move itself work include:

2. The two trainee Heritage Assistants who will spend some of their 12 months from Summer 2019-Summer 2020 helping the archivists and conservators in particular with the final stage of work.

3. Approx. 3,700 hours by volunteers (the volunteers involved will be a mixture of existing and new volunteers).

They will be trained alongside staff by the freelance conservator, SRO conservator and other members of the collections team.

A Decant and Recant team will be established in May 2018 which will have responsibility for resources, packing and barcoding programmes, set targets and monitor progress. The membership will include representatives from the record office management, collections and searchroom services teams, together with the new Freelance Conservator and a representative from the volunteers.

The existing record office conservation, materials, equipment, boxing and packaging budgets will be used to support the project as much as possible. The majority of the funding for materials, boxes and packaging will however come from the HLF grant amounting to:

- £100,000 across 2018/19 and 2019/20 for boxes and packaging.
- £100,000 for the actual removal of the collections from their current locations.

## **4.2 Project Streams**

The project streams have emerged from the information gathered during the room assessment which is included as Appendix A. Some of the streams are likely to involve many staff and run the entire period of preparation prior to the move, whilst others could be completed within a set period and involve fewer staff. SRO will continuously monitor project timetable, key milestones and budget against targets.

### **1. Collections management**

- Establish Collections Advisory Group.
- Contact major depositors to inform them of the project.
- Set a date when to close to the public and length of closure.
- Set a date when to stop taking in new accessions or loaning items.
- Carry out an audit of any material out on loan and recall any outstanding items.
- Establish a timetable to complete the backlog of confidential waste.
- Consider the needs of temporary deposits.
- Consider the issues for records management material.
- Complete the Shelf Analysis to identify storage formats in the strongrooms.
- Identify staff and volunteer availability.
- Identify staff requirements and funding arrangements.
- Establish an overall estimate for the move budget.
- Assess collections for digitisation prior to the move.
- Agree with the Collections Advisory Committee what material from BRO is going to move to The Hold. (i.e. a mixture of little used or digitised material in the outstore and the main strongroom).

## **2. Finding aids and reference material**

- Review reference materials to confirm what could be available on-line and what needs to be available in analogue form.
- Consider what finding aids need to be available in the new searchroom and how they should be presented.
- Establish what the offer is for public access to printed maps.
- Consider the status and future for microfilm and microfiche and what will be digitised prior to the move.

## **3. Managing the move**

- Establish a Decant and Recant Team to co-ordinate the various practical aspects of the move.
- Set up the project stream for packing and barcoding programmes, including timetable, targets and monitoring arrangements.
- Train, allocate work to and monitor progress of staff and volunteers.
- Interrogate the data from the shelf analysis and create an overview of the quantity of the various box sizes and formats.
- Identify and quantify collections with special moving requirements.
- Identify equipment with special moving requirements
- Identify high value collections/items which may need to be moved separately.
- Confirm the quantity and formats of the IRO, BRO, LRO and CAA collections and any special requirements.
- Confirm issues of insurance.
- Carry out a risk assessment on the practical aspects of moving the collections.
- Consider whether the new repository will have separate areas for the storage of bound, boxed, outsized and rolled archives.
- Consider whether the boxing programme will aim to box all the bound items or only priority items and use archival kraft paper jackets for more robust volumes.
- Consider the needs of cold storage for photographic media.
- Develop a brief and tender for moving collections including arrangements for staff to assist with and monitor the move at all sites.
- Establish access arrangements from LRO, BRO, IRO and CAA into new building.
- Monitor and record the drying out of The Hold strongrooms.
- Monitor and record use of budget and resources.
- Clarify staff requirements and time table for moving material.
- Identify collections to be digitised prior to the move as part of the 10-year management and maintenance plan.

## **4. Local studies material**

- Quantify the amount of material – shelves, sizes

- Establish the amount of local studies material that will be available on open access.
- Dispose of any duplicate stock or other items not to be retained.
- Estimate the number of crates and packaging required for transportation.
- Pamphlets, magazines, newspapers – loose and upright in archival and non-archival boxes – re-package and store flat in archive boxes.
- Confirm which printed maps will be on open access in the searchroom and which will be kept in the strongrooms or disposed.
- Identify which local studies material is to be moved to the new building, which is to be re-located within Lowestoft and what will be disposed.

## **5. Phase boxing project**

- Obtain samples and estimates (based on 1000 small, medium and large average sizes of book) from potential box-making suppliers.
- Consider options to box only priority items or box all volumes and use archival kraft paper jackets for more robust volumes.
- Set criteria for priority volumes (large, red-rot, unstable bindings, etc)
- Set up spreadsheet and procedures for measuring volumes.
- Establish project plan for measuring, ordering, storing and fitting phase boxes.
- Implement phase boxing programme.

## **6. Rolls storage and re-packaging**

- Set up a standard system of wrapping or boxing for rolled maps on shelving racks.
- Consider the needs of loose rolls on mobile shelving – many rolls could be stored in boxes slightly longer than existing map boxes. Establish a size that could fit into future shelving.
- Consider the needs of loose bundles on mobile shelving – they could be separated into smaller bundles which could then fit into boxes.
- Consider the needs of some rolled sheets, (tracing cloth, plastic based plans) on mobile shelving which could unroll readily and be stored flat in folders below a specified size.
- Implement the re-packing including rolling round inner cores and wrapping.

## **7. Archive re-packaging**

- Using the shelf analysis identify series that have specific packaging and/or cataloguing issues.
- Order archive boxes and secondary packing materials, allocate and start to implement boxing, re-boxing and packing programme.
- Store loose archives in archive boxes and, if possible, archive folders;
- remove sheets from ring-binders, tie or attach in some other method, and store in folders and archive boxes.
- Post-bindings that are easily detached and do not provide standardised storage – remove sheets and store flat in folders and archive boxes.

- Consider how to re-package index cards in archive boxes.
- Store non-standard format items (deeds in seal boxes, etc.) in oversize archive boxes.
- Dispose of old display material – after checking there is documentation and recording.
- Divide heavy, overfull archive boxes.
- De-frame items or if to be retained store wrapped in an archive box
- Archives that have to be stored without full re-packaging (e.g. folded building plans or papers which are in acidic envelopes) should be listed as future projects.

## **8. Photographic media**

- Quantify the amount of photographic material and formats and order appropriate boxes and secondary packing and allocate.
- Ensure all photographic media is clearly labelled.
- Set standards for the future storage environment of the various formats
- Package unsorted material or items not currently in packaging to photo specification standard, in appropriate boxes including agreed new box size NB ensure items requiring storage at -20 degrees C are packed in appropriate buffering. Secondary packing within boxes will in some cases be a later project.
- Consider options for storage/digitisation of microfiche and microfilm.

## **9. Barcoding**

- Purchase bar-coding equipment; scanners, scanner software, shelf barcode stickers, labels, etc, CALM upgrade.
- Scope out what support is required by IT from Orangeleaf, and set up meetings.
- Establish how the container barcode is to be generated (i.e. what functionality CALM has to produce barcodes against accession numbers or groups of objects) for the pilot and what information it needs to contain.
- Establish a working process and timetable a very small pilot involving one or two bays of shelves at IRO.
- Establish a working process and timetable for the BRO outstore pilot for Spring/Summer 2018.
- Carry out a pilot project at the BRO outstore to establish how a scheme could be implemented to barcode and label containers.
- Consider the option to use the LRO material as a second pilot project for bar- coding
- following the pilot, establish how much barcoding can be carried out by staff and how much by contract staff or volunteers.
- Establish how to generate container barcodes for IRO, CAA and LRO material and identify tasks to undertake for data entry.
- Create shelf barcodes for the new building.
- Barcode containers at IRO, CAA and LRO.

- Develop a brief for the transport company to use barcodes as part of the move.

## 5. Tasks according to phase

The project streams (PS) identified in the previous section will need to be phased within the overall project plan with key targets and milestones identified and set within a detailed timetable. The following list of tasks under Phase 1 to 4 headings is intended to fit into and support the existing project management process, bringing together the preparation and implementation aspects of the decant plan within an overall planning structure.

### ***Phase 1 – Planning***

- Develop an overview for the timetable for quantifying the collections and the re- packaging needs (PS 1, 2, 4, 8)
- Complete the Shelf Analysis to identify the storage formats in the strong rooms (PS1)
- Consider whether the new repository will have separate areas for the storage of bound, boxed, outsized and rolled archives (PS3)
- Consider whether the boxing programme will aim to box all the bound items or only priority items and use archival kraft paper jackets for more robust volumes (PS1)
- Consider needs of cold storage for photographic media (PS3)
- Identify and quantify unpackaged collections and how they are to be moved (PS3)
- Identify and quantify collections with special moving requirements (PS3)
- Identify equipment with special moving requirements (PS3)
- Identify high value collections which may need to be moved separately (PS3)
- Quantify the BRO, LRO, CAA and IRO collections and what formats they are in – shelf analysis (PS 3 and 10)
- Quantify amount of photographic material and formats (PS8)
- Begin to identify staff and volunteer availability (PS1)
- Establish an overall estimate for the move budget (PS1)
- Establish Collections Advisory Group (PS1)
- Scope support required from IT and Orangeleaf and set up meetings (PS9)
- Establish a working process and timetable a very small pilot involving one or two bays of shelves at IRO (PS9)
- Review reference materials to confirm what could be available on-line and what needs to be available in analogue form (PS2)
- Consider what finding aids need to be available in the new searchroom and how they should be presented (PS2)

- Establish the amount of local studies material that will be available on open access (PS4)
- Establish the offer is for public access to printed maps (PS4)
- Consider the status and future for microfilm and microfiche and what will be digitised prior to the move (PS2)

## ***Phase 2 – Preparation***

- Establish which members of the Decant and Recant Team (staff and volunteers) will be responsible for monitoring the timetable and coordinating the practical aspects of the move (PS3)
- Assess collections for digitisation prior to the move (PS1)
- Set up the project streams with a timetable, staff responsibilities and targets (PS3)
- Identify space requirements for storage of archive packaging prior to the move (PS1)
- Identify space requirements and options at IRO, BRO, LRO and CAA for packing activities and carry out bar-coding pilot and BRO (PS 3, 5, 6, 7, 8)
- Consider the needs of loose rolls on mobile shelving – many rolls could be stored in boxes slightly longer than existing map boxes. Establish a size that could fit into future shelving (PS6)
- Consider the needs of loose bundles on mobile shelving – they could be separated into smaller bundles which could then fit into boxes (PS6)
- Consider the needs of some rolled sheets, (tracing cloth, plastic based plans) on mobile shelving which could unroll readily and be stored flat in folders below a specified size (PS6)
- Establish security protocols during the move (PS3)
- Conduct risk assessment for moving collections (PS3)
- Confirm the service implications (PS1)
- Confirm insurance requirements (PS3)
- Contact major depositors to inform them of the project (PS1)
- Clarify steps required to take bar-coding forward and how the bar-coding process will be used by the transportation company (PS9)
- Develop the standards and a brief for packing and transportation of collections (PS3)
- Obtain samples and estimates (based on 1000 small, medium and large average sizes of book) from potential box-making suppliers (PS5)
- Consider staff and volunteer resources, space and budget for materials to carry out packaging projects (PS 3, 4, 5, 6, 7, 8)
- Order archive packaging (quantities informed by shelf analysis work) (PS 3 and 8)
- Purchase barcode equipment and carry out a pilot at the BRO outstore (PS9)
- Create shelf barcodes for the new building (PS9)

- Monitor and record the drying out of The Hold strongrooms (PS3)
- Agree with the Collections Advisory Committee what material from BRO is going to move to The Hold. (Just material currently in the outstore or a mixture of material in the outstore and the main strongroom) (PS1)

### ***Phase 3 – Packing, inputting and digitisation activities***

- Implement the phase boxing project (PS5)
- Implement the rolls storage and re-packaging project (PS6)
- Implement the archive re-packaging project (PS7)
- Implement the photographic media project (project plan 8)
- Implement barcoding of containers at IRO, CAA and LRO (PS9)
- Ensure that weight issues and re-boxing of glass plate negatives and any other special items at BRO outstore, LRO, CAA and IRO are addressed (PS8)
- Confirm arrangements for staff helping and monitoring the moving company during the move (PS3)
- Confirmation of brief and tendering for moving companies (PS3)
- Obtain estimates from specialist removal companies, tender and commission the services of a company (PS3)
- Establish access arrangements from LRO, BRO, IRO and CAA and into new building (PS3)

### ***Phase 4 – Relocation***

- Confirm that the strongrooms in The Hold are dry enough to start moving archives in i.e. RH levels are appropriate (PS3)
- Confirm the timetable for the move (PS3)
- Continue to monitor the budget (PS3)
- Complete barcoding (PS3)
- Confirm staff responsibilities and activities for the move (PS3)
- Implement service changes (PS1)
- Carry out move with support from the removal company (PS3)



## Timescale - overview

[illegible]

Task Name	Description	Resources	Start	Finish	Winter 16/17	Spring 17	Summer 17	Autumn 17	Winter 17/18	Spring 18	Summer 18	Autumn 18	Winter 18/19	Spring 19	Summer 19	Autumn 19	Winter 19/20	Spring 20
	equipment and space																	
	Assess collections for digitisation prior to move	Collections & Searchroom Services Teams	Feb-18	Apr-18														
	Quantify removal requirements for collections, furniture and equipment	Record Office Management Team	Feb-18	Aug-18														
Phase 2 - Preparation May 2018 – begins with HLF Delivery Phase																		
Programme Management	Confirm responsibilities, decant recant team membership	HLF Project Coordinator, Record Office Management Team	May-18	Sep-19														
	Train, allocate work and monitor progress of staff & volunteers	New decant recant team <sup>6</sup>	May-18	Sep-19														
	Order first batches of packaging and barcoding materials and equipment	Record Office Management Team & Conservators	May-18	Jun-18														
	Plan the locations, including specialist photographic storage and barcode the shelves	New decant recant team	May-18	Sep-19														
Feed into the communications plan	Contact major depositors, inform stakeholders of restrictions on intake of new material and of closure dates	Collections Team working through in batches	Jul-18	Dec-18														
Removal	Develop brief, including security protocols, RA, insurance arrangements and priority collections for removal by SRO staff	HLF Project Coordinator, Record Office Management & Collections Team	Sep-18	Nov-18														
New building	Monitor and record the drying out of The Hold	Collections Team working with the building contractors & architect	May-19	Sep-19														
Phase 3 - Packing, inputting and digitisation activities Apr 2018-Sep 2019																		

<sup>6</sup> Decant/recant team includes SRO volunteers

[illegible]

## 7. Guidelines for transportation and barcodes

The timetable to move collections will depend on how long the building needs to dry out, the installation of mobile racking and other storage furniture.

It is recommended that the new shelving is fully numbered prior to the move so that locations can be accurately included in the move guide.

### **7.1 Moving collections**

It is recommended that staff monitor both ends of the move and work alongside transport company staff to ensure that material is handled, moved and tracked to a satisfactory standard. Mistakes are extremely difficult to rectify after a move and it is better if the process is slower but carried out to a pace that can be checked and monitored rather than fast and inaccurate.

The following list of transportation firms have all been used for moving archives. They are not included in any specific order and the report does not make a recommendation of any commercial company.

Transdec <http://www.transdec.co.uk/storage.html>

Johnson's Moves <http://www.johnsonsmovingservices.co.uk/library-archive-moves/>

Harrow Green <http://www.harrowgreen.com/>

Delivery Services <http://www.delivery-services.com/>

Taylor Transport <http://www.taylortransportremovals.com/>

Nexus <http://www.nexus-uk.com/>

Pickfords <http://www.pickfords.co.uk/>

It is expected that a tender process based on a written brief will be used to select a firm. The brief should include and require the following information:

- Specifications on how to transport special items such as large rolled items, ordnance survey maps, glass plate negatives, etc.
- Packing specifications for the transportation of printed books.
- Barcoding arrangements for crates and transport boxes.
- IRO to establish an order in which material is to be moved.
- Insurance for material during the move.
- Access requirements at LRO, IRO, BRO, CAA and the new facility.
- Special requirements of large, delicate equipment and heavy equipment.
- Guidance on handling for all types of material.
- Cost breakdown of the actual move and the management of the move.
- An estimate of how many lorry loads will be required and how many could be expected in each day.
- An estimate of how many staff will be required for the move.

- Dates and a timetable.

## **7.2 Barcoding**

Barcoding will be a crucial element of the move and will enable SRO to locate, identify and group items during and after the move. Advice has been sought during the HLF Development Phase from Cambridgeshire Record Office, The Keep, East Sussex, Kent History and Library Centre, and West Yorkshire Archive Service and the Parliamentary Archives are keeping us informed about their project. The Collections Manager also attended the Shift It Conference at Wakefield in November 2017 to learn from other projects and came back with a variety of top tips and some useful statistics to inform planning.

The success of the barcoding scheme will depend on a number of factors;

- the quality and consistency of the information that the office is able to input into the barcode; Excel or CALM can print data placed in the report field for a barcode label and batches of barcodes for a particular series of boxes or containers associated with accessions within collections can be made if a collection is not fully catalogued
- staff time available to fill in gaps in data, if required
- establishing the necessary information for the barcode label – sufficient information for items to be located efficiently but not too much information as that can make the label large and unwieldy
- clarifying what items and packaging will be individually bar-coded and which collections – e.g. local studies printed books – might be placed in barcoded crates during the move
- an efficient system to print the barcodes – printing on a continuous roll on a portable printer enables labels to be printed in location
- availability of hand held wireless/Blu-tooth readers
- consistent application of labels on boxes and other packaging formats
- ability to produce duplicate labels so that they can go on the side and/or front of a box, if required
- barcode labels that are produced with ink that will not smudge, using acrylic adhesive to provide long-term binding to most surfaces and acid-free paper
- establishing a system of applying a barcode to a Tyvek label which can be tied to an item if it does not have packaging which can have a label applied
- ensuring that the transport company provide an estimate which includes the use of barcodes, as required for the move

- developing a detailed timetable of how long is required to carry out the barcoding depending on the factors above<sup>2</sup>

<sup>2</sup> Recent moves of printed books at the Bodleian Library used mobile scanners and laptops to barcode items. Using their system (which was developed specifically for the task) barcoders worked at a rate of approximately 1 minute per item. <http://www.bodleian.ox.ac.uk/our-work/estates-projects/completed-projects/barcoding>

Location	No. of shelves
Ipswich downstairs strongroom	4024
Ipswich upstairs strongroom	3970
IRO total	7994
LRO store	1079
CAA in Bury (equivalent SRO shelves)	67
Bury outstore	508
Totals	9648

### 7.2.1 Summary of the West Yorkshire Archive Service barcoding project

CALM was used to manage both the catalogued and uncatalogued collections and links the locations to the catalogue. Barcodes were created using Excel and imported into CALM. Two sets of barcodes were needed to run the project:

**Location Barcodes** - attached to the shelves/map tanks/trolleys in strong rooms

**Container Barcodes** – attached to the container in which documents are stored whether that is a box, a loose volume on a shelf, a map cabinet or a wrapped roll of plans. For each container a note of the collection reference, any accession numbers which could be identified, any other descriptions written on the outside of the container and the format of the container was made. These notes were typed up into Excel spreadsheets so that they could be easily imported into CALM. For the barcoding to work successfully the barcode numbers had to be added into these spreadsheets before the information was imported into CALM.

It took 1 person, 1 hour to attach 50 barcodes.

#### The Location Barcode

Every location has a unique Location Barcode (LB). Every shelf, map tank, drawer etc has a barcode stuck to it. Even places used temporarily for storage like on trolleys or holding areas should get a barcode.

The LB is a machine-readable barcode plus an easily readable number. All LB barcode numbers start with the letter 'S' and are followed by a string of 6 numbers.

An Excel spreadsheet records the LB number with the Location Reference, e.g.

Location Reference	Location Barcode
Nortech/A1/1	S000001
Nortech/A1/2	S000002

It took 1 person 1 day to attach 1,000 shelf location barcodes.

## **The Container Barcode**

Every container has a unique Container Barcode (CB), barcodes are attached to:

- Box, if items are stored in a box
- Volume, if it is loose on a shelf – either on the spine if the volume has been wrapped in archival paper or an archival tie tag
- Roll, if an item is rolled and wrapped in archival packaging, or to a tied tag
- Package, if items are stored in an envelope or wrapped parcel loose on the shelf

The Container Barcode is larger than the Location Barcode so there are enough numbers, and has a series of eight numbers 'C' (e.g. C00000001).

The CB formed the basis of the locations database in CALM. CBs were created using templates in Word; barcode numbers in an Excel spreadsheet were merged, using a barcode font, into Word to print the labels.

## **The Location Record in CALM**

The CALM locations database works in a similar way to an accessions database. Every single Container is a separate record in the locations database which can then be linked through to the catalogue database. The CB acts as the location record's unique identifier.

Each location record in the locations database of CALM can be linked to an item level description in the catalogue database. One location record can be linked to one or more item level descriptions if necessary.

In the catalogue module of CALM the Container Barcode is shown at the bottom of the page. This shows that this item is linked to the relevant record in the locations database. When in the catalogue database it is possible to click on the 'Locations' tab and see what other items are stored in that particular location.

## **Data Entry**

In Leeds, there were two phases to data entry. The first phase was to get all of the locations information recorded in Excel spreadsheets. Then the data was imported as a whole into the locations database in CALM. The second part to the process was linking the information in the locations database to descriptions in the catalogue database.

## **Moving a Large Number of Containers to new Locations**

IT created a program that allowed the Leeds project to search for old locations in a spreadsheet and replace them with new locations. When moving a large number of containers, each new Location Barcode was scanned followed by each Container Barcode stored at that location by staff using a barcode data collector. Then a find and replace script was run in CALM to update all of the old Location Barcodes with new Location Barcodes.

It took 1 person 30 secs to 1 minute to collect the shelf barcode and the barcodes of all the boxes on that shelf (a box barcode can be zapped every couple of seconds).

## **Appendix A – Room assessment for decant**

<b>Location</b>	<b>Collection type</b>	<b>Action</b>
<b>Lower Strong Room</b>		
AA-AW	New accessions and unsorted material	<ul style="list-style-type: none"> <li>Set date to stop taking in new collections</li> <li>Standardise any remaining uncatalogued material into records management boxes (rm boxes)</li> </ul>
AV	Letter books Overfull archive boxes Large heavy archive boxes Post-bindings	<ul style="list-style-type: none"> <li>Phase box volumes in poor condition – or all</li> <li>Consider option to store letter books in archive boxes</li> <li>Consider options to remove papers from post-bindings</li> </ul>
AD-AE	Volumes – lots Oversize items, unstable Large heavy	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Divide archive boxes</li> </ul>
AF-AG	Glass plate negatives Large heavy boxes Volumes Post-bindings – card indexes Loose rolls – small and large bundles	<ul style="list-style-type: none"> <li>Clearly label all photographic media, standardise packaging – i.e. put unpackaged media in the same type of boxes for the move</li> <li>Divide archive boxes</li> <li>Re-package post-bindings</li> <li>Re-package or unroll rolled bundles</li> </ul>
AH-AJ	Loose rolls Folders and loose flat docs Acidic boxes	<ul style="list-style-type: none"> <li>Re-package rolls</li> <li>Replace acidic boxes</li> <li>Put oversize documents in archive folders</li> </ul>
AK-AL	Computer print-outs Large post-bindings Loose rolls Loose archives, Acidic boxes Unsorted slides, videos, colour photos	<ul style="list-style-type: none"> <li>Clearly label all photographic media, standardise packaging</li> <li>Replace acidic boxes</li> <li>Re-package post-bindings, loose archives</li> <li>Re-package or unroll rolled bundles</li> </ul>
AM-AN	Ring-binders Folded documents in acidic envelopes Overfull boxes Loose rolls Large	<ul style="list-style-type: none"> <li>Re-package ring-binders, documents</li> <li>Divide overfull boxes</li> <li>Re-package rolls</li> <li>Phase box volumes</li> </ul>
AZ	Rolled maps, loose on shelves, various sizes	<ul style="list-style-type: none"> <li>Establish standardised packaging for protection during storage and handling – wrapping and/or map boxes</li> </ul>
AP-BA	Volumes, lots Post-bindings and ring-binders Framed items Old display material Loose rolls Photo media – scrapbooks, slides, glass plate negatives	<ul style="list-style-type: none"> <li>Clearly label all photographic media, standardise packaging</li> <li>De-frame and package framed items</li> <li>Re-package post-bindings, ring-binders</li> <li>Re-package or unroll rolled bundles</li> <li>Phase box volumes</li> </ul>
BB-BC	Volumes, oversize registers Microfilm, plastic negatives Acidic, large heavy boxes Post-bindings	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package post-bindings</li> <li>Divide archive boxes</li> <li>Clearly label all photographic media, standardise packaging</li> </ul>



BD-BE	Volumes, oversize registers Loose archives, ring-binders Loose rolls Large rolled bundles	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Box archives and remove papers from ring-binders</li> <li>Re-package rolls and bundles</li> </ul>
BF-BG	Computer-print outs loose Volumes, oversize red-rot Letter book sheets in post- bindings	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package loose archives</li> </ul>
BH-BJ	Volumes Loose archives, acidic boxes A2 and smaller maps loose Unsorted local studies	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package loose archives and maps</li> <li>Box or dispose of local studies material</li> </ul>
BK-BL	Volumes Large post-bindings	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package post-bindings</li> </ul>
BM-BN	Volumes, large Post-bindings	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package post-bindings</li> </ul>
BP-BQ	Volumes Post-bindings Loose archives Computer-print outs Acidic boxes	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package post-bindings, loose archives, print-outs</li> <li>Replace acidic boxes</li> </ul>
BR-BS	Volumes, red-rot Rolls, large bundles, small rolls Loose archives Unsorted slides and photo- albums	<ul style="list-style-type: none"> <li>Clearly label all photographic media, standardise packaging</li> <li>Phase box volumes</li> <li>Re-package and/or open out rolls</li> <li>Package loose archives</li> </ul>
BT-CA	Volumes Post-bindings, ring-binders Glass plate negatives Loose archives Oversize docs and photos	<ul style="list-style-type: none"> <li>Clearly label all photographic media, standardise packaging</li> <li>Phase box volumes</li> <li>Re-package post-bindings, ring-binders</li> <li>Package loose archives</li> </ul>
CB-CC	Oversize documents, wrapped tied, open both ends Volumes Post-bindings Glass plate negatives	<ul style="list-style-type: none"> <li>Clearly label all photographic media, standardise packaging</li> <li>Phase box volumes</li> <li>Re-package post-bindings, ring-binders</li> <li>Package loose archives</li> </ul>
CD-CE	Folded docs in acidic envelopes Loose archives Volumes Loose rolls	<ul style="list-style-type: none"> <li>Consider the option to remove acidic envelopes and store folded documents in archive folders</li> <li>Phase box volumes</li> <li>Re-package rolls</li> </ul>
CF-CG	Folded docs in acidic envelopes Acidic boxes Loose archives	<ul style="list-style-type: none"> <li>Consider the option to remove acidic envelopes and store folded documents in archive folders</li> <li>Replace acidic boxes</li> </ul>
CH-CJ	Ring-binders Volumes	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package ring-binders</li> </ul>
CK-CL	Volumes Post-bindings Scrapbooks	<ul style="list-style-type: none"> <li>Phase box volumes, scrapbooks</li> <li>Re-package post-bindings, ring-binders</li> </ul>

CM-CN	Loose rolls Post-bindings	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package post-bindings</li> <li>Re-package large documents</li> </ul>
CP-CQ	Volumes Acidic boxes Glass plate negatives, various	<ul style="list-style-type: none"> <li>Clearly label all photographic media, standardise packaging</li> <li>Phase box volumes</li> <li>Re-package post-bindings, ring-binders</li> </ul>
CR-CS	Volumes Large documents	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package large documents</li> </ul>
CT-CU	Index cards Post-bindings Rolled plans in brown paper wrappings and plastic bags	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package post-bindings, index cards</li> <li>Re-package rolls</li> </ul>
CV-CY	Volumes Ring-binders Scrapbooks, slides, glass plate negatives	<ul style="list-style-type: none"> <li>Clearly label all photographic media, standardise packaging</li> <li>Phase box volumes</li> <li>Re-package ring-binders</li> </ul>

Location	Collection type	Action
<b>Upper Strong Room</b>		
DA-DB-DC	Volumes Loose archives Ring-binders, post-bindings Broken and acidic archive boxes Loose rolls	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package ring-binders, post-bindings</li> <li>Re-package rolls</li> <li>Package loose archive</li> <li>Replace old archive boxes</li> </ul>
DQ	Modern papers in ring-binders Archive packaging Microfilms	<ul style="list-style-type: none"> <li>Clearly label all photographic media, standardise packaging</li> <li>Review retention and re-package ring-binders</li> <li>Quantify space for archive packaging</li> </ul>
DR	Rolled maps, oversize, no packaging	<ul style="list-style-type: none"> <li>Consider options for packaging in standard sizes of wrapper and/or box</li> </ul>
DO-DP	Loose rolls Oversize documents between boards Large soft cover folders Items in polyester sleeves Oversize volumes Old display material Archive packaging	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Re-package large documents</li> <li>Quantify space for archive packaging</li> <li>Store oversize documents in standard size folders, to fit half and full size of the shelf</li> <li>Dispose of old display material</li> <li>Re-package rolls</li> </ul>
DE-DD	Volumes Photo albums – sticky pages Oversize documents Large volumes in deep piles	<ul style="list-style-type: none"> <li>Phase box volumes</li> <li>Store oversize documents in folders</li> <li>Clearly label all photographic media, standardise packaging</li> </ul>

DF-DG	Oversize documents between boards Loose rolls Volumes Post-bindings, ring-binders Registers, red-rot Acidic boxes	<ul style="list-style-type: none"> <li>• Phase box volumes</li> <li>• Re-package ring-binders, post-bindings</li> <li>• Replace acidic boxes</li> <li>• Re-package large documents</li> </ul>
DH-DJ	Loose soft cover folders Acidic boxes Ring-binders Card indexes Negatives in drawers, photo albums Folded plans in transfer cases Loose and unsorted archives Oversize documents, loose rolls	<ul style="list-style-type: none"> <li>• Phase box volumes</li> <li>• Replace transfer cases with archive folders and boxes</li> <li>• Re-package large documents</li> <li>• Re-package ring-binders, post bindings, card indexes</li> <li>• Store oversize documents in standard size folders</li> <li>• Replace acidic boxes</li> <li>• Re-package rolls</li> <li>• Clearly label all photographic media, standardise packaging</li> </ul>
DK-DL	Rolled and folded building plans Volumes Unsorted archive material, Oversize documents	<ul style="list-style-type: none"> <li>• Phase box volumes</li> <li>• Package archives</li> <li>• Re-package large documents</li> </ul>
DM-EA	Glass plate negatives Audio visual media Volumes Loose archives Rolled building plans, tight bundles in acidic tubes Oversize documents and photo	<ul style="list-style-type: none"> <li>• Phase box volumes</li> <li>• Re-package large documents</li> <li>• Re-package rolls</li> <li>• Clearly label all photographic media, standardise packaging</li> <li>• Package archives</li> </ul>
EB-EC	Glass plate negatives, various Cassette and video players DVDs and other audio visual and photographic media	<ul style="list-style-type: none"> <li>• Clearly label all photographic media, standardise packaging</li> </ul>
EE-ED	Large volumes	<ul style="list-style-type: none"> <li>• Phase box volumes</li> </ul>
EG-EF	Volumes	<ul style="list-style-type: none"> <li>• Phase box volumes</li> </ul>
EJ-EH	Loose archives Photo albums	<ul style="list-style-type: none"> <li>• Phase box volumes</li> <li>• Re-package large documents</li> <li>• Clearly label all photographic media, standardise packaging</li> </ul>
EL-EK	Oversize documents in soft folders Volumes	<ul style="list-style-type: none"> <li>• Phase box volumes</li> <li>• Re-package large documents</li> </ul>

EN-EM	Loose archives Rolled maps, small	<ul style="list-style-type: none"> <li>• Re-package rolls</li> <li>• Package archives</li> </ul>
EQ-EP	Glass plate negatives Letter book sheets in ring- binders, large Old archive boxes	<ul style="list-style-type: none"> <li>• Clearly label all photographic media, standardise packaging</li> <li>• Consider options for storing letter book sheets</li> </ul>
ES-ER	Rolled building plans, tight bundles in acidic tubes Volumes Loose archives Acidic boxes	<ul style="list-style-type: none"> <li>• Remove plans from tubes and re-package</li> <li>• Phase box volumes</li> <li>• Replace acidic boxes</li> <li>• Package archives</li> </ul>
FB-FC	Deed, seal boxes Volumes	<ul style="list-style-type: none"> <li>• Store non format items in oversize archive boxes</li> <li>• Phase box volumes</li> </ul>
FE-FD	Volumes Deed, seal boxes	<ul style="list-style-type: none"> <li>• Phase box volumes</li> <li>• Store non format items in oversize archive boxes</li> </ul>
FG-FF	Volumes Building plans, loose Old archive boxes	<ul style="list-style-type: none"> <li>• Phase box volumes</li> <li>• Re-package archives</li> <li>• Replace old archive boxes</li> </ul>
FJ-FH	Volumes Building plans, loose archives	<ul style="list-style-type: none"> <li>• Phase box volumes</li> <li>• Re-package archives</li> </ul>
FL-FK	Rolled and folded building plans Loose archives	<ul style="list-style-type: none"> <li>• Re-package and unroll plans</li> <li>• Package archives</li> </ul>
FM	Microfilm	<ul style="list-style-type: none"> <li>• Clearly label all photographic media, standardise packaging</li> </ul>
FQ	Bound newspapers	<ul style="list-style-type: none"> <li>• Assess needs of large volumes</li> <li>• Phase box weak bindings</li> </ul>
FR-FT FV-FX	Local studies printed books Unsorted archives Ring-binders	<ul style="list-style-type: none"> <li>• Dispose of any duplicate stock</li> <li>• Assess number of crates for transportation</li> </ul>
FZ	Ring-binders – modern papers	<ul style="list-style-type: none"> <li>• Review, repackage in archive boxes</li> </ul>

Collection type	Action
<b>Search Room</b>	
Card indexes	<ul style="list-style-type: none"> <li>• Quantify - count number of shelves</li> <li>• Quantify different series and consider options to transfer some or all onto</li> </ul>
Indexes in ring-binders	<ul style="list-style-type: none"> <li>• Quantify</li> <li>• Consider the options to transfer some or all onto spreadsheets, if to retain in paper form consider putting into new or archival ring-binders</li> </ul>
Indexes in A5 bindings	<ul style="list-style-type: none"> <li>• Quantify</li> <li>• Consider the options to transfer some or all onto spreadsheets, if to retain in paper form consider putting into new or archival ring-binders</li> </ul>
Reference books	<ul style="list-style-type: none"> <li>• Quantify</li> <li>• Review usage and if some available on-line</li> </ul>
Directories	<ul style="list-style-type: none"> <li>• Quantify</li> <li>• Review usage and if some available on-line</li> </ul>
Newspaper cuttings in upright box files	<ul style="list-style-type: none"> <li>• Quantify, number of boxes</li> <li>• Put into archive folders and boxes and store flat on the shelf</li> </ul>

Collection type	Action
<b>Microform Room</b>	
Indexes in ring-binders	<ul style="list-style-type: none"> <li>• Quantify</li> <li>• Consider the options to transfer some or all onto spreadsheets, if to retain in paper form consider putting into new or archival ring-binders</li> </ul>
Reference books	<ul style="list-style-type: none"> <li>• Quantify</li> <li>• Review usage and if some available on-line</li> </ul>
Suffolk Family History Society Library	<ul style="list-style-type: none"> <li>• Quantify</li> <li>• Review usage and if some available on-line</li> </ul>
Microfilm and microfiche cabinets	<ul style="list-style-type: none"> <li>• Consider the status and future for microfilm and microfiche and what will be digitised prior to the move</li> <li>• Consider which cabinets require replacing</li> </ul>

Collection type	Action
<b>Map Room</b>	
16 map cabinets holding hanging printed maps	<ul style="list-style-type: none"> <li>Quantify how many large crates needed to transport the maps</li> <li>Review condition of cabinets</li> <li>Consider if they are all to be retained or if some should be replaced</li> <li>Refurbish mechanisms of cabinets to be retained</li> <li>Clean cabinets to be retained</li> <li>Measure cabinets to ensure that those of a similar size can be positioned next to each other in the new public area</li> <li>Consider replacing some cabinets with plan chests which can also be used as tables for access</li> </ul>
Newspaper cuttings in 3, 4-drawer filing cabinets	<ul style="list-style-type: none"> <li>Quantify</li> <li>Dispose of filing cabinets</li> <li>Put into archive folders and boxes and store flat on the shelf</li> </ul>

Collection type	Action
<b>Education Room</b>	
Mobile shelving – local studies printed books	<ul style="list-style-type: none"> <li>Dispose of any duplicate stock</li> <li>Assess number of crates for transportation</li> </ul>
Mobile shelving – reference books	<ul style="list-style-type: none"> <li>Review usage and if some available on-line</li> <li>Assess number of crates for transportation</li> </ul>
Mobile shelving – education files	<ul style="list-style-type: none"> <li>Quantify</li> </ul>
Mobile shelving – items for sale	<ul style="list-style-type: none"> <li>Set date from which material will be disposed of if not sold</li> </ul>
Box files, archive records, on top of wooden cupboards	<ul style="list-style-type: none"> <li>Review and transfer to archive</li> <li>Re-package in archive folders and boxes</li> </ul>
Wooden cupboards – disaster response equipment Packaging	<ul style="list-style-type: none"> <li>Quantify storage space requirements</li> </ul>

Collection type	Action
<b>BRO out store</b>	
Mobile shelving - volumes	<ul style="list-style-type: none"> <li>Phase box large volumes</li> <li>Put smaller volumes in archive boxes</li> </ul>
Mobile shelving – boxed material	<ul style="list-style-type: none"> <li>Quantify</li> <li>Review usage and if they need to be re-boxed for move</li> </ul>
Static shelving – oversize volumes	<ul style="list-style-type: none"> <li>Phase box</li> </ul>
Static shelving – glass plate negatives	<ul style="list-style-type: none"> <li>Quantify</li> <li>Review usage and if they need to be re-boxed for move</li> </ul>

Collection type	Action
<b>LRO strongrooms</b>	
Mobile shelving - volumes	<ul style="list-style-type: none"> <li>• Phase box large volumes</li> <li>• Put smaller volumes in archive boxes</li> </ul>
Mobile shelving – boxed material	<ul style="list-style-type: none"> <li>• Quantify</li> <li>• Review usage and if they need to be re-boxed for move</li> </ul>
Static shelving – oversize volumes	<ul style="list-style-type: none"> <li>• Phase box</li> </ul>
Static shelving – glass plate negatives	<ul style="list-style-type: none"> <li>• Quantify</li> <li>• Review usage and if they need to be re-boxed for move</li> </ul>
Rolled maps, loose on shelves, various sizes	<ul style="list-style-type: none"> <li>• Establish standardised packaging for protection during storage and handling – wrapping and/or map boxes</li> </ul>

Collection type	Action
<b>LRO Searchroom, sorting room, book stack and offices – generally consider what will move to the Access Point and what will move to Ipswich</b>	
Card indexes	<ul style="list-style-type: none"> <li>• Quantify - count number of drawers</li> <li>• Quantify different series and consider options to transfer some or all onto spreadsheets</li> </ul>
Catalogues and indexes in ring-binders	<ul style="list-style-type: none"> <li>• Quantify</li> <li>Consider the options to transfer some or all onto spreadsheets, if to retain in paper form consider putting into new or archival ring-binders</li> </ul>
Reference books	<ul style="list-style-type: none"> <li>• Quantify</li> <li>Review usage and if some available on-line</li> </ul>
Directories	<ul style="list-style-type: none"> <li>• Quantify</li> <li>Review usage and if some available on-line</li> </ul>
Newspaper cuttings in upright box files	<ul style="list-style-type: none"> <li>• Quantify, number of boxes</li> <li>Put into archive folders and boxes and store flat on the shelf</li> </ul>
Plan chests x 2 wooden and metal, 6 upright map cabinets,	<ul style="list-style-type: none"> <li>• Quantify how many large crates needed to transport the maps</li> <li>• Review condition of cabinets</li> <li>• Consider if they are all to be retained or if some should be replaced</li> <li>• Refurbish mechanisms of cabinets to be retained</li> <li>• Clean cabinets to be retained</li> <li>• Measure cabinets to ensure that those of a similar size can be positioned next to each other in the new public area</li> <li>• Consider replacing some cabinets with plan chests which can also be used as tables for access</li> </ul>

3 Port of Lowestoft Research Society 6 drawer filing cabinets	<ul style="list-style-type: none"> <li>• Quantify number of photographs</li> <li>• Discuss future storage with PLRS in improved packaging etc i.e. (Dispose of filing cabinets put into archive folders and boxes and store in strongroom.)</li> </ul>
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Collection type	Action
<b>Archaeology strongroom in Bury</b>	
2 normal size metal plan chests of Ipswich site drawings	<ul style="list-style-type: none"> <li>• Quantify number of drawings</li> <li>• Consider repacking the drawings for long-term storage in The Hold</li> <li>• Quantify how many large crates needed to move to Ipswich</li> </ul>
2 x 4 draw filing cabinets of slides in secol packets	<ul style="list-style-type: none"> <li>• Quantify the number of slides, dates and material type</li> <li>• Quantify number to be stored at -20 degrees C</li> <li>• Agree what repacking will be done with Archaeology prior to removal</li> </ul>
Archive boxes	<ul style="list-style-type: none"> <li>• Quantify</li> <li>• Review usage and if they need to be re-boxed for move</li> </ul>
Contact prints and negatives in ring binders and box files	<ul style="list-style-type: none"> <li>• Quantify the number of prints and negatives, dates and types</li> <li>• Quantify number to be stored at -20 degrees C</li> <li>• Agree what repacking will be done with Archaeology prior to removal</li> </ul>
A4 pamphlet boxes	<ul style="list-style-type: none"> <li>• Quantify the number of reports etc</li> <li>• Estimate number with colour text or graphics</li> <li>• Agree what repacking will be done with Archaeology prior to removal</li> </ul>



Equipment	Action
<b>Scanning Room</b>	
Sheet feed scanner, large delicate equipment	<ul style="list-style-type: none"> <li>Assess weight, size and insurance for transportation</li> </ul>
BookEye 3 scanner, large delicate equipment	<ul style="list-style-type: none"> <li>Assess weight, size and insurance for transportation</li> </ul>
Digital camera stand, medium size, delicate equipment	<ul style="list-style-type: none"> <li>Assess weight, size and insurance for transportation</li> </ul>

Equipment	Action
<b>Conservation Rooms</b>	
Vacuum table, heavy, large, delicate equipment.	<ul style="list-style-type: none"> <li>Assess width for access through doorways</li> <li>Assess weight, size and insurance for transportation</li> </ul>
Leaf caster, on wheels, medium weight	<ul style="list-style-type: none"> <li>Assess weight, size and insurance for transportation</li> </ul>
Guillotine, small, medium weight	<ul style="list-style-type: none"> <li>Assess weight, size and insurance for transportation</li> </ul>
Board chopper, small, medium weight	<ul style="list-style-type: none"> <li>Assess weight, size and insurance for transportation</li> </ul>
Standing presses x 2, extremely heavy	<ul style="list-style-type: none"> <li>May need specialist lifting equipment</li> <li>Assess weight, size and insurance for transportation</li> </ul>
Fume cabinet, large, delicate	<ul style="list-style-type: none"> <li>Could be dismantled</li> <li>Assess weight, size and insurance for transportation</li> </ul>
Shelving for conservation materials	<ul style="list-style-type: none"> <li>Replace shelves which waste space, retain metal uprights</li> </ul>
Conservation materials	<ul style="list-style-type: none"> <li>Audit materials</li> </ul>
Chemicals in secure fume cupboard	<ul style="list-style-type: none"> <li>Review chemicals and dispose of any not required</li> <li>Carry out COSHH assessments for any chemicals that need to be relocated to new premises</li> <li>Ensure clearly labelled for separate storage in 2 locations</li> </ul>

## **Appendix B –Decant and Recant plan activity spreadsheet**

<b>Phase</b>	<b>Activity</b>	<b>Outcome</b>	<b>Timing - start date unless otherwise indicated</b>	<b>Resources</b>
<b>1 Planning</b>				
1	Develop an overview for the timetable for quantifying the collections and the re-packaging needs	Timetable in Decant plan	Jul 2017	NCS report
2	Complete the Shelf Analysis to identify the storage formats in the strong rooms	Shelf analysis	Sep 2017	SRO staff time
3	Establish policies, standards, procedures and priorities for packing, storage and removal	SRO management and NCS to assess	Jun 2017	SRO staff time
4	Start to identify and quantify unpackaged collections and how they are to be moved	Identify from shelf analysis	Sept/Oct 2017	SRO staff time
5	Start to identify and quantify collections with special moving requirements	Identify from shelf analysis and other information	Sept/Oct 2017	SRO staff time
6	Identify equipment with special moving requirements	Decant and Recant plan	Jul 2017	NCS report
7	Start to identify items and series that have specific packaging requirements	Identify from shelf analysis and other information	Sept/Oct 2017	SRO staff time
8	Start to identify high value collections/items which may need to be moved separately	Collections Team to assess	Sept/Oct 2017	SRO staff time
9	Quantify the IRO collections and what formats they are in, including Local Studies, photographic materials and microform	Data on box sizes and numbers, volumes, rolls and other loose material from shelf analysis	Sept/Oct 2017	IRO staff time
10	Quantify the BRO collections to move as above	Data on box sizes and numbers, volumes, rolls and other loose material from shelf analysis	Sept/Oct 2017	SRO staff time
11	Quantify the LRO collections to move as above	Data on box sizes and numbers, volumes, rolls and other loose material from shelf analysis	Sept/Oct 2017	SRO staff time
12	Quantify the Archaeology collections to move	Archaeology staff to assess	Jan 2018	SCCAS staff time
13	Begin to identify staff and volunteer availability	SRO management and project manager to assess	Nov 2017	SRO staff time
14	Begin to identify staff requirements and funding arrangements	SRO management and project manager to assess	Nov 2017	SRO staff time
15	Establish an overall estimate for the move budget	SRO management and project manager to assess	Jul/Aug 2017	SRO staff time

16	Begin to establish Collections Advisory Group	SRO management	Aug 2017	SRO staff time
17	Begin an audit any material out on loan and recall any outstanding items	SRO management to decide	Oct 2017	SRO staff time
18	Establish a timetable to complete the backlog of confidential waste	SRO management to decide	Oct 2017	SRO staff time
19	Consider the needs of temporary deposits	SRO management to decide	Oct 2017	SRO staff time
20	Consider the issues for records management material	SRO management to decide	Oct 2017	SRO staff time
21	Scope what support is required from SCC IT and Orangeleaf and set up meetings	SRO management to decide	Oct 2017	SRO staff time and IT
22	Establish a working process and timetable for the IRO and BRO barcode pilots	SRO management to decide	Oct/Nov 2017	SRO staff time
23	Establish how the barcode is to be generated (i.e. what functionality CALM has is to produce barcodes against accession numbers or groups of objects) for the pilot and what information it needs to contain	SRO management to decide	Oct/Nov 2017	SRO staff time
24	Carry out a very small pilot involving one or two bays of shelves at IRO to establish a working process	SRO management to decide	Dec 2017	SRO staff time
25	Carry out a pilot project at the BRO out store to establish how a scheme could be implemented to barcode and label containers	SRO management to decide	Spring/summer 2018	SRO staff time
26	Following the pilots, establish how much barcoding can be carried out by staff and how much by contract staff or volunteers	SRO management to decide	Summer 2018	SRO staff time
27	Consider whether the new repository will have separate areas for the storage of bound and boxed archives	SRO management to decide	Sep/Oct 2017	SRO staff time
28	Consider whether the boxing programme will aim to box all the bound items or only priority items and use archival kraft paper jackets for more robust volumes	SRO management to decide	Sept/Oct 2017	SRO staff time
29	Consider the needs of cold storage for photographic media	SRO management to decide, implications for new build	Sept/Oct 2017	SRO staff time
30	Quantify the amount of local studies material – shelves, sizes	Shelf analysis	Sept/Oct 2017	SRO staff time
31	Consider staff resources, space and budget for materials to carry out packaging projects	SRO management to decide	Jan 2018	IRO staff time, budget for archive packaging
32	Identify possible space requirements for storage of archive packaging prior to the move	SRO management to assess	Jan 2018	SRO staff time
33	Identify possible space requirements and options at all branches for packing activities	SRO management to assess	Jan 2018	SRO staff time

34	Begin planning shelving requirements in The Hold including specialist photographic storage and CAA with architects	SRO Management and Collections Teams, and a SCCAS team member	Jan 2018	SRO staff time
35	Begin to quantify packing materials, barcoding equipment and space etc needed	Collections Team to assess	Jan 2018	SRO staff time
36	Begin to assess collections for digitisation prior to move	Collections and Searchroom Services Teams to assess	Feb 2018	SRO staff time
37	Begin to review reference materials to confirm what could be available on-line and what needs to be available in analogue form	Collections and Searchroom Services Teams to assess	Feb 2018	SRO staff time
38	Begin to consider what finding aids need to be available in the new searchroom and how they should be presented	Collections and Searchroom Services Teams to assess	Feb 2018	SRO staff time
39	Begin to consider the amount of local studies material that will be available on open access	Collections and Searchroom Services Teams to assess	Apr 2018	SRO staff time
40	Begin to consider what the offer is for public access to printed maps	Collections and Searchroom Services Teams to assess	Apr 2018	SRO staff time
41	Consider the status and future for microfilm and microfiche and what will be digitised prior to the move	Collections and Searchroom Services Teams to assess	Apr 2018	SRO staff time
<b>2 Preparation</b>				
1	Confirm responsibilities, decant and recant team membership, including new HLF roles, resources	The decant and recant team to take an overview of PS and management of the move	May 2018	SRO staff time
2	Set up the project streams with a timetable, packing and barcoding programmes, targets and monitoring arrangements	The decant and recant team to establish timetable, targets and oversee the budget for project streams	May 2018	Budgets to be set
3	Train, allocate work and monitor progress of staff and volunteers	New decant and recant team	Jun 2018	SRO staff time
4	Contact depositors to inform them of the project	SRO management to delegate	Jul 2018	SRO staff time
5	Set a date when to close to the public and length of closure	SRO management to decide	Oct 2018	SRO staff time
6	Set a date when to stop taking in new accessions or loaning out items	SRO management to decide	Oct 2018	SRO staff time

7	Develop a brief and tender for moving collections including arrangements for staff to assist with and monitor the move at all sites	SRO management and decant and recant team to decide	Sep 2018	SRO staff time
7	Establish security protocols during the move	The decant and recant team to take advice from <a href="http://collectionstrust.org.uk/resource/security-in-museums-archives-and-libraries-a-practical-guide/">http://collectionstrust.org.uk/resource/security-in-museums-archives-and-libraries-a-practical-guide/</a> to set up security protocols during the move	Sep 2018	SRO staff time
8	Conduct risk assessment for moving collections	The decant and recant team to carry out risk assessment based on existing methods - <a href="http://collectionstrust.org.uk/resource/how-to-assess-and-manage-risk-in-collections-care/">http://collectionstrust.org.uk/resource/how-to-assess-and-manage-risk-in-collections-care/</a>	Sep 2018	SRO staff time
10	Confirm insurance requirements	SRO management to investigate	Sep 2018	SRO staff time
11	Purchase barcoding equipment, scanners, software, labels etc	SRO management to decide	May 2018	SRO staff time
12	Begin to order archive packaging (quantities informed by shelf analysis work)	The decant and recant team and IRO management, following consultation with conservation staff	May/Jun 2018	SRO or project staff
13	Obtain samples and estimates (based on 1000 small, medium and large average sizes of book) from potential box-making suppliers	The decant and recant team with conservator, obtain estimates for cost	May/Jun 2018	SRO staff time, budget for phase boxing
14	Consider options to box only priority items or box all volumes	SRO management to decide	May 2018	SRO staff time
15	Set criteria for priority volumes (large, red-rot, unstable bindings, etc)	IRO conservator in consultation with SRO managers	Jun 218	SRO staff time
16	Set up spreadsheet and procedures for measuring volumes	IRO conservator in consultation with SRO managers	Jun 2018	SRO staff time
17	Establish project plan for measuring, ordering, storing and fitting phase boxes	IRO conservator in consultation with SRO managers	Jun 2018	SRO staff time, set budget
18	Develop standard system of wrapping or boxing for rolled maps on shelving racks	IRO conservator in consultation with SRO managers	May/Jun 2018	SRO staff time, set budget
19	Consider the needs of loose rolls on mobile shelving – many rolls could be stored in boxes slightly longer than existing map boxes. Establish a size that could fit into future shelving.	IRO conservator in consultation with SRO managers	May/Jun 2018	SRO staff time, set budget

20	Consider the needs of large rolled bundles loose on mobile shelving – large bundles could be separated into smaller bundles which could then fit into boxes	IRO conservator in consultation with SRO managers	May/Jun 2018	SRO staff time, set budget
21	Consider the needs of some rolled sheets, (tracing cloth, plastic based plans) on mobile shelving which could unroll readily and be stored flat in folders below a set size.	IRO conservator in consultation with SRO managers	May/Jun 2018	SRO staff time, set budget
22	Begin project to store loose archives in archive boxes and, if possible, archive folders	The decant and recant team to organise	Jun/Jul 2018	SRO staff time, set budget
23	Begin project to remove sheets from ring-binders, tie or attach in some other method, and store in folders and archive boxes	The decant and recant team to organise	Jun/Jul 2018	SRO staff time, set budget
24	Begin project to post-bindings that are easily detached and do not provide standardised storage – remove sheets and store flat in folders and archive boxes	The decant and recant team to organise	Jun/Jul 2018	SRO staff time, set budget
25	Consider how to re-package index cards in archive boxes	The decant and recant team to organise	Jul 2018	SRO staff time, set budget
26	Begin project to store non-standard format items (deeds in seal boxes, etc.) in oversize archive boxes	The decant and recant team to organise	Jun/Jul 2018	SRO staff time, set budget
27	Begin to establish the amount of local studies material that will be available on open access	Collections and Searchroom Services Teams	Jun 2018	SRO staff time
27	Dispose of old display material – after checking there is documentation and recording	Searchroom Services Team	Aug 2018	SRO staff time
28	Begin project to divide heavy, overfull archive boxes	The decant and recant team to organise	Jun/Jul 2018	SRO staff time, set budget
29	Begin project to de-frame items or if to be retained store wrapped in an archive box	The decant and recant team to organise	Jun/Jul 2018	SRO staff time, set budget
30	Archives that must be stored without full re-packaging (e.g. folded building plans or papers which are in acidic envelopes) should be listed as future projects	The decant and recant team to organise	Jun/Jul 2018	SRO staff time
31	Confirmation of brief and tendering for moving companies and obtain an up to date estimate for the HLF Bid	The decant and recant team to organise	Oct 2018	SRO staff time
33	Monitor and record the drying out of The Hold	Collections Team working with builders and architects	May 2019	SRO staff time
<b>3 Packaging, inputting and digitisation activities</b>				
3	Begin to dispose of any duplicate local studies stock or other items not to be retained	SRO management to delegate	Jul/Aug 2018	SRO staff time

4	Estimate the number of crates and packaging required for transportation of local studies material	The decant and recant team	Sep 2018	SRO staff time
5	Local studies pamphlets, magazines, newspapers – loose and upright in archival and non-archival boxes – begin to re-package and store flat in archive boxes	The decant and recant team to include as part of archive repackaging project stream	Jun 2018	SRO staff time, budget for archive packaging
6	Implement phase boxing programme	IRO conservator, collections team and decant and recant team	May/Jun 2018	SRO or project staff time, packaging as identified in prep phase
7	Implement the rolls storage and re-packaging project	IRO conservator, collections team and decant and recant team	May/Jun 2018	SRO or project staff time, packaging as identified in prep phase
8	Implement the archive re-packaging project	IRO conservator, collections team and decant and recant team	May/Jun 2018	SRO staff time, packaging as identified in prep phase
7	Implement the photographic media project	IRO conservator, collections team and decant and recant team	May/Jun 2018	SRO staff time, packaging as identified in prep phase
8	Implement barcoding of containers at IRO, Archaeology and LRO	Decant and recant team	Jan 2019	SRO staff time, budget as identified in prep phase
9	Confirm arrangements for staff monitoring the moving company during the move	Decant and recant team	Oct 2018	SRO staff time, packaging as identified in prep phase
10	Obtain estimates from specialist removal companies, tender and commission the services of a company	Decant and recant team	Jan 2019	SRO staff time
11	Establish access arrangements from BRO, IRO, LRO and SCC Archaeology and into new building	Decant and recant team	Jan 2019	SRO staff time
<b>Phase 4 – Relocation</b>				
1	Confirm that the strongrooms in The Hold are dry enough to start moving archives in	Collections Team working with builders and architects	Aug 2019	SRO staff time

2	Confirm the timetable for the move	SRO management	Aug 2019	SRO staff time
4	Complete barcoding	Decant and recant team	Jul 2019	SRO staff time budget as set
5	Confirm staff responsibilities and activities for the move	SRO management	Mar 2019	SRO staff time
7	Carry out move with support from the removal company	All staff	Sep 2019	SRO staff time and contractor time, budget as set
8	Monitor and record environmental conditions in The Hold during and post the move of collections	Collections Team working with builders and architects	Sep 2019	SRO staff time
9	SRO staff move high value material	SRO management and collections team	Nov 2019	SRO staff time
10	Resolve location and packing queries that occur during the move	Collections Team	Jan 2020	SRO staff time



## Appendix 2 - Suffolk Record Office Documentation Plan costing

### Explanatory notes/assumptions

#### Cost equivalents:

Archivist	£134.83
Paraprofessional	£89.10
Volunteer	£150 (skilled rate)

#### Coding of staff time:

Code: A= Archivist, P = Paraprofessional, V = Volunteer, VM = Volunteer Management

Yellow = SRO 'Notable' collections

Annual Documentation Plan personnel costs and contributions-in-kind - uninflated														
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
	£	£	£	£	£	£	£	£	£	£	£	£	£	£
Archivists	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	6,472	5,258
Para-professionals	5,435	2,673	0	0	0	0	4,455	0	0	0	89	0	0	0
Archivists managing volunteers (1 archivist day for every five volunteer days)	347	2,315	2,701	0	0	0	502	334	707	0	476	3,215	257	219
<i>Total staff costs</i>	<i>12,254</i>	<i>11,460</i>	<i>9,172</i>	<i>6,472</i>	<i>6,472</i>	<i>6,472</i>	<i>11,428</i>	<i>6,806</i>	<i>7,179</i>	<i>6,472</i>	<i>7,037</i>	<i>9,687</i>	<i>6,729</i>	<i>5,477</i>
Contribution-in-kind from volunteers	4,050	27,000	31,500	0	0	0	5,850	3,900	8,250	0	5,550	37,500	3,000	2,550
Annual Documentation Plan personnel costs and contributions-in-kind – inflated @3% (staff costs only)														
	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
Staff costs (3% inflation from 2021)	£	£	£	£	£	£	£	£	£	£	£	£	£	£
Archivists	6,866	7,072	7,284	7,503	7,728	7,960	8,198	8,444	8,698	8,959	9,227	9,504	9,789	8,192
Para-professionals	5,766	2,921	0	0	0	0	5,643	0	0	0	127	0	0	0
Archivists managing volunteers (1 archivist day for every five volunteer days)	368	2,529	3,040	0	0	0	635	436	951	0	678	4,721	389	341
<i>Total staff costs</i>	<i>13,000</i>	<i>12,522</i>	<i>10,324</i>	<i>7,503</i>	<i>7,728</i>	<i>7,960</i>	<i>14,477</i>	<i>8,881</i>	<i>9,648</i>	<i>8,959</i>	<i>10,033</i>	<i>14,225</i>	<i>10,178</i>	<i>8,533</i>
Contribution in kind from volunteers	4,050	27,000	31,500	0	0	0	5,850	3,900	8,250	0	5,550	37,500	3,000	2,550

### Collections to be catalogued (with related personnel requirements)

[illegible]

[illegible]

[illegible]

Appendix 3 – 10 year<sup>7</sup> Management and Maintenance Plan for The Hold (new building)

Ref	LOCATION	ELEMENT	DESCRIPTION	PLANNED MAINTENANCE REQUIREMENT	FREQUENCY	RESPONSIBILITY	YEAR & COST						
							1	2 -3	4 - 5	6 -7	8 - 9	10 -11	12 - 13
-	-	-					2019-2020	2021-2022	2023-2024	2025-2026	2027-2028	2029-2030	2031-2032
EX01	The Hold	Structure	External Walls and Roof	No planned maintenance required	Inspect room for any movement, cracks, water ingress and report on any findings	Facilities Management Contract	£500	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000
EX02		Roofs	Pitched roof covered with profiled zinc coverings	Monitor roof coverings, inspect and report any identified damage. Allowance for minor zinc repairs	Annually	Facilities Management Contract	£250	£500	£500	£500	£500	£500	£500
EX03		Roofs	Zinc rainwater goods	Undertake repairs to zinc rainwater goods	Every 5 Years	Facilities Management Contract			£1,000			£1,000	
EX04		Roofs	Flat single ply roofs	Inspect and report any damage to main roofs. Inspect all outlets individually. Examine all mastic sealant and mortar pointing for degradation.	Annually	Facilities Management Contract	£250	£500	£500	£500	£500	£500	£500
EX05		Roofs	Flat single ply roofs	Clear all debris from the roof surface, rainwater outlets, chutes, gutters etc. Ensure that all rainwater outlets and downpipes are free from bolckages and that water can flow freely.	Annually	Facilities Management Contract	£500	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000
EX06		Roofs	Flat single ply roofs	Undertake localised single ply repairs	Every 5 Years	Facilities Management Contract			£1,000			£1,000	
EX07		Roofs	Flat single ply roofs	Application of solar reflective paint	Every 5 Years	Facilities Management Contract			£2,500			£2,500	
EX08		Roofs	Rooflights	Inspect and report any damage to rooflights. Allowance for minor repairs to be conducted.	Annually	Facilities Management Contract	£100	£200	£200	£200	£200	£200	£200
EX09		Roofs	Rooflights	Clean glazing on main roofs and canopies	Bi-Annually	Facilities Management Contract		£500	£500	£500	£500	£500	£500
EX10		Roofs	Parapet Walls	Undertake repairs to parapet capping	Every 7 Years	Facilities Management Contract				£1,000			
EX11		Roofs	Grey water harvesting tanks	Tanks to be inspected and tested. Ensure system is clear of blockage and water is able to flow freely. Replace filters as necessary.	Annually	Facilities Management Contract	£150	£300	£300	£300	£300	£300	£300
EX12		Roofs	Grey water harvesting tanks	General repairs to tank enclosure as required	Every 7 Years	Facilities Management Contract				£750			
EX13		Roofs	Zinc clad canopies	Monitor roof coverings, inspect and report any damage. Allowance for minor repairs.	Annually	Facilities Management Contract	£100	£200	£200	£200	£200	£200	£200
EX14		Roofs	External joinery including fascias and soffits	Rub down, prepare and redecorate with sealants and lacquers to match base specification	Every 5 Years	Facilities Management Contract				£3,000		£3,000	
EX15		Roofs	Ventilation Louvers	Inspection and maintenance testing. Clean debris, replace filters as required and make allowance for minor repairs	Annually	Facilities Management Contract	£250	£500	£500	£500	£500	£500	£500
EX16		Roofs	Plant enclosure screen louvers	Inspection and cleaning with allowance for minor repairs	Annually	Vertas	£100	£200	£200	£200	£200	£200	£200
EX17		Roofs	Roof access hatches, man safe systems and sliding cat ladders	Safety inspection and cleaning with allowance for minor repairs	Annually	Vertas	£300	£600	£600	£600	£600	£600	£600
EX18		Walls	External Brickwork	Inspect and remove vegetation. Report any damage	Annually	Vertas	£100	£200	£200	£200	£200	£200	£200
EX19		Walls	External Brickwork	Re-point defective brickwork where requiried	Every 7 Years	Vertas/specialist sub-contractor				£2,500			

<sup>7</sup> The plan forecasts 12 years to cover the 2 operational years that fall within the HLF funded Delivery Phase, plus 10 complete years after project completion

EX20		Walls	External Stonework	Inspect for loose stonework. Report any damage. Allowance for minor repairs	Annually	Vertas	£100	£200	£200	£200	£200	£200	£200
EX21		Doors	Glazed sliding doors	Clean glass to sliding doors	Quarterly	Vertas	£100	£200	£200	£200	£200	£200	£200
EX22		Doors	Glazed sliding doors	Inspect doors and seals reporting any damage	Annually	Vertas	£100	£200	£200	£200	£200	£200	£200
EX23		Doors	Personnel Doors	Inspect doors and seals reporting any damage	Annually	Vertas	£100	£200	£200	£200	£200	£200	£200
EX24		Doors	Personnel Doors	Rub down, prepare and redecorate with oil based paint to match base specification	Every 5 Years	Vertas			£3,000			£3,000	
EX25		Windows	Windows	Clean glass to all windows	Quarterly	Vertas	£800	£1,600	£1,600	£1,600	£1,600	£1,600	£1,600
EX26		Windows	Windows	Inspect windows and seals reporting any damage	Annually	Vertas	£100	£200	£200	£200	£200	£200	£200
EX27		Windows	Clerestory Windows	Clean glass to clerestory windows	Quarterly	Vertas	£500	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000
EX28		Windows	Clerestory Windows	Inspect and report any damage	Annually	Vertas	£100	£200	£200	£200	£200	£200	£200
EX29		Walls	External Joinery	Rub down, prepare and redecorate with sealants and lacquers to match base specification	Every 5 Years	Vertas			£2,500			£2,500	
EX31		Site & Landscape	External ramps	Inspection and allowance for minor repairs	Annually	Vertas	£200	£400	£400	£400	£400	£400	£400
EX32		Site & Landscape	External ramps	Cleaning of floor finishes	Monthly	Vertas	£750	£1,500	£1,500	£1,500	£1,500	£1,500	£1,500
EX33		Site & Landscape	Stairs	Inspection and allowance for minor repairs	Annually	Vertas	£200	£400	£400	£400	£400	£400	£400
EX34		Site & Landscape	Stairs	Cleaning of floor finishes	Monthly	Vertas	£750	£1,500	£1,500	£1,500	£1,500	£1,500	£1,500
EX35		Site & Landscape	Terrace	Inspection and allowance for minor repairs	Annually	Vertas	£200	£400	£400	£400	£400	£400	£400
EX36		Site & Landscape	Terrace	Cleaning of floor finishes	Monthly	Vertas	£750	£1,500	£1,500	£1,500	£1,500	£1,500	£1,500
EX37		Site & Landscape	Paving and walkways	Inspection and allowance for minor repairs	Annually	Vertas	£200	£400	£400	£400	£400	£400	£400
EX38		Site & Landscape	Paving and walkways	Cleaning of floor finishes	Monthly	Vertas	£750	£1,500	£1,500	£1,500	£1,500	£1,500	£1,500
EX39		Site & Landscape	External metalwork - balustrades, railings and gates	Inspection of metal work finishes. Report any damage. Allowance for minor repairs	Bi-Annually	Vertas/specialist sub-contractor	£200	£400	£400	£400	£400	£400	£400
EX40		Site & Landscape	External metalwork - balustrades, railings and gates	Cleaning of metal work finishes	Monthly	Vertas/specialist sub-contractor	£750	£1,500	£1,500	£1,500	£1,500	£1,500	£1,500
EX41		Site & Landscape	External metalwork - Automated Gates	Inspect operation of mechanisms, motors, sensors and contacts. Service and report any damage	Annually	Vertas/specialist sub-contractor	£150	£300	£300	£300	£300	£300	£300
EX42		Site & Landscape	Boundary Walls	Inspect and remove vegetation. Remove any damage	Annually	Vertas/specialist sub-contractor	£100	£200	£200	£200	£200	£200	£200
EX43		Site & Landscape	Boundary Walls	Re-point brickwork	Every 7 Years	Vertas/specialist sub-contractor				£2,000			
EX44		Site & Landscape	Grassed and planted areas	Maintain, weed, mow. Allowance for re-building and planting in spring annually	Monthly	Vertas / Volunteers (north garden area)	£1,200	£2,400	£2,400	£2,400	£2,400	£2,400	£2,400
EX45		Site & Landscape	Foliage and Large Trees	Check trees and large shrubs. Report any dead branches and signs of ill health or root damage to buildings or below ground drainage.	Quarterly	Vertas/specialist sub-contractor	£100	£200	£200	£200	£200	£200	£200
EX46		Site & Landscape	Large Trees	Trim back overhanging trees	Every 5 Years	Vertas/specialist sub-contractor			£500			£500	
EX47		Site & Landscape	Car Park	Line markings to be repainted	Every 7 Years	Vertas/specialist sub-contractor				£750			
EX48		Drainage	Drainage - gulleys, slots and grates	Inspect individual outlets, clean gratings/ wire balloons, replace as necessary.	Bi-Annually	Vertas/specialist sub-contractor		£300	£300	£300	£300	£300	£300

EX49		Drainage	Drainage - Chambers	Inspection chambers. Ensure all chambers and below ground drainage are clear of blockages and free flowing. Allow for jetting	Annually	Vertas/specialist sub-contractor	£600	£1,200	£1,200	£1,200	£1,200	£1,200	£1,200
	TOTALS:						£11,400	£23,600	£34,100	£33,600	£23,600	£37,100	£23,600

Ref	LOCATION	ELEMENT	DESCRIPTION	PLANNED MAINTENANCE REQUIREMENT	FREQUENCY	RESPONSIBILITY	YEAR & COST						
							0	0	0	0	0	0	0
-	-	-					0	0	0	0	0	0	£0
IN01	All Floors	Structure	Internal Walls, floor and Ceiling	Inspect room for any movement, cracks, water ingress, mould growth and report on any findings	Annually	Vertas	£200	£404	£404	£404	£404	£404	£404
IN02	All Floors	Walls	Acoustic Panelling	Cleaning and inspection. Report any damage with allowance to minor repairs	Annually	Vertas/specialist sub-contractor	£125	£252	£252	£252	£252	£252	£252
IN03	All Floors	Walls	Internal Solar Shading	Cleaning and inspection. Report any damage with allowance to minor repairs	Annually	Vertas/specialist sub-contractor	£125	£252	£252	£252	£252	£252	£254
IN04	All Floors	Walls	Internal Joinery	Rub down, prepare are redecorate with oil based paint to match base specification	Every 5 Years	Vertas	£0	£0	£3,030	£0	£0	£3,030	£0
IN05	All Floors	Miscellaneous	General Cleaning	Floor finishes, WC's, showers, kitchen areas, classrooms, café area, etc. to be cleaned on a daily basis	Daily	Vertas	£26,900	£54,340	£54,340	£54,340	£54,340	£54,340	£54,340
IN06	All Floors	Finishes	Mat Well	Cleaning of matting. Weekly lifting of matting for cleaning recessed area below (cost included in IN05)	Daily	Vertas	£0	£0	£0	£0	£0	£0	£0
IN07	All Floors	Finishes	Mat Well	Deep clean of entrance matting (cost included in IN05)	Quarterly	Vertas	£0	£0	£0	£0	£0	£0	£0
IN08	All Floors	Finishes	Mat Well	Replacement of Entrance Matting	Every 5 Years	Vertas	£0	£0	£632	£0	£0	£632	£0
IN09	All Floors	Doors	Internal doors	Inspection and allowance for general maintenance to ironmongery	Annually	Vertas	£250	£506	£506	£506	£506	£506	£506
IN10	All Floors	Doors	Internal doors	Rub down, prepare and redecorate doors with oil based paint	Every 5 Years	Vertas	£0	£0	£2,526	£0	£0	£2,526	£0
IN11	All Floors	Doors	Internal Joinery	Rub down, prepare are redecorate with oil based paint to match base specification (Included within IN10)	Every 5 Years	Vertas	£0	£0	£0	£0	£0	£0	£0
IN12	All Floors	Miscellaneous	Ramps	Inspection and allowance for minor repairs	Annually	Vertas	£50	£102	£102	£102	£102	£102	£102
IN13	All Floors	Miscellaneous	Stairs	Inspection and allowance for minor repairs	Annually	Vertas	£75	£152	£152	£152	£152	£152	£152
IN14	All Floors	Miscellaneous	Balustrades and Handrails	Inspection and allowance for minor repairs	Annually	Vertas	£75	£152	£152	£152	£152	£152	£152
IN15	All Floors	Miscellaneous	Seating, tables, book shelves and desks	Inspection and allowance for minor repairs	Annually	Vertas	£250	£506	£506	£506	£506	£506	£506
IN16	All Floors	Windows	Internal Glazing	Inspect glazing and seals and report any damage	Annually	Vertas	£50	£102	£102	£102	£102	£102	£102
IN17	All Floors	Windows	Internal Glazing	General Cleaning (cost included in IN05)	Daily	Vertas	£0	£0	£0	£0	£0	£0	£0
IN18	Auditorium/ Lecture Theatre	Walls	Internal Walls	Redecorate walls with painted finish to match base specification	Every 5 Years	Vertas	£0	£0	£1,566	£0	£0	£1,566	£0
IN19	Auditorium/ Lecture Theatre	Ceilings	Internal Ceiling Finish	Redecorate ceiling to match base specification (Cost included within IN18)	Every 5 Years	Vertas	£0	£0	£0	£0	£0	£0	£0

IN20	Auditorium/ Lecture Theatre	Finishes	Internal floor finish	General Cleaning (cost included in IN05)	Weekly	Vertas	£0	£0	£0	£0	£0	£0	£0
IN21	Auditorium/ Lecture Theatre	Finishes	Internal floor finish	Inspection of floor coverings. Allow for general repairs	Annually	Vertas	£50	£102	£102	£102	£102	£102	£102
IN22	Auditorium/ Lecture Theatre	Finishes	Internal floor finish	Renewal of floor finishes to match base specification	10 Years	Vertas	£0	£0	£0	£0	£0	£6,212	£0
IN23	Auditorium/ Lecture Theatre	Miscellaneous	Lecture theatre seating	Inspect furniture/ fittings and allow for minor repairs	Annually	Vertas/specialist sub-contractor	£250	£506	£506	£506	£506	£506	£506
IN24	Auditorium/ Lecture Theatre	Miscellaneous	Protective nosing on steps leading through centre of lecture theatre	Inspect nosing to steps and allow for minor repairs	Annually	Vertas	£63	£126	£126	£126	£126	£126	£126
IN25	Education/ Seminar Rooms	Walls	Internal Walls	Redecorate walls with painted finish to match base specification	Every 5 Years	Vertas	£0	£0	£1,060	£0	£0	£1,060	£0
IN26	Education/ Seminar Rooms	Ceilings	Ceiling finish	Redecorate ceiling to match base specification (cost included in IN25)	Every 5 Years	Vertas	£0	£0	£0	£0	£0	£0	£0
IN27	Education/ Seminar Rooms	Finishes	Internal floor finish	General Cleaning (cost included in IN05)	Daily	Vertas	£0	£0	£0	£0	£0	£0	£0
IN28	Education/ Seminar Rooms	Finishes	Internal floor finish	Inspection of floor coverings. Allow for general repairs	Annually	Vertas	£50	£102	£102	£102	£102	£102	£102
IN29	Education/ Seminar Rooms	Finishes	Internal floor finish	Renewal of floor finishes to match base specification	10 Years	Vertas	£0	£0	£0	£0	£0	£4,454	£0
IN30	Kitchen Areas	Walls	Internal walls	Redecorate walls with finish to match base specification	Every 5 Years	Vertas	£0	£0	£404	£0	£0	£404	£0
IN31	Kitchen Areas	Ceilings	Ceiling finish	Redecorate ceiling to match base specification (cost included in IN30)	Every 5 Years	Vertas	£0	£0	£0	£0	£0	£0	£0
IN32	Kitchen Areas	Finishes	Internal floor finish	General Cleaning (cost included in IN05)	Daily	Vertas	£0	£0	£0	£0	£0	£0	£0
IN33	Kitchen Areas	Finishes	Internal floor finish	Inspection of floor coverings. Allow for general repairs	Annually	Vertas	£50	£102	£102	£102	£102	£102	£102
IN34	Kitchen Areas	Finishes	Internal floor finish	Renewal of floor finishes to match base specification	10 Years	Vertas	£0	£0	£0	£0	£0	£632	£0
IN35	Kitchen Areas	Miscellaneous	Kitchen and severy fittings	Inspect and allow for minor repairs	Annually	Vertas	£200	£404	£404	£404	£404	£404	£404
IN36	Kitchen Areas	Miscellaneous	General Fire Fighting Equipment	Inspection and testing	Annually	Specialist contractor	£250	£506	£506	£506	£506	£506	£506
IN37	WC/ Shower Area	Walls	Internal Walls	Redecorate walls with painted finish to match base specification	Every 5 Years	Vertas	£0	£0	£2,222	£0	£0	£2,222	£0
IN38	WC/ Shower Area	Ceilings	Internal Ceiling Finish	Redecorate ceiling to match base specification (Cost included in IN37)	Every 5 Years	Vertas	£0	£0	£0	£0	£0	£0	£0
IN39	WC/ Shower Area	Finishes	WC/ Shower seals	Inspection for signs of leaks and reapplication of sealant	Every 3 Years	Vertas	£0	£126	£0	£126	£126	£0	£126
IN40	WC/ Shower Area	Finishes	WC/ Showers	General Cleaning (cost included in IN05)	Daily	Vertas	£0	£0	£0	£0	£0	£0	£0
IN41	WC/ Shower Area	Finishes	Internal floor finish	Renewal of floor finishes to match base specification	10 Years	Vertas	£0	£0	£0	£0	£0	£1,768	£0
IN42	WC/ Shower Area	Miscellaneous	Cubicle Systems	Allow for general repairs to doors/ cubicles	Annually	Vertas	£125	£252	£252	£252	£252	£252	£252
IN43	Circulation Areas	Walls	Internal Walls	Redecorate walls with painted finish to match base specification	Every 3 Years	Vertas	£0	£3,334	£0	£3,334	£3,334	£0	£3,334



IN44	Circulation Areas	Ceilings	Internal Ceiling Finish	Redecorate ceiling to match base specification (Cost included in IN43)	Every 3 Years	Vertas	£0	£0	£0	£0	£0	£0	£0
IN45	Circulation Areas	Finishes	Internal floor finish	General Cleaning (cost included in IN05)	Daily	Vertas	£0	£0	£0	£0	£0	£0	£0
IN46	Circulation Areas	Finishes	Internal floor finish	Inspection of floor coverings. Allow for general repairs	Annually	Vertas	£100	£202	£202	£202	£202	£202	£202
IN47	Circulation Areas	Finishes	Internal floor finish	Renewal of floor finishes to match base specification	5 Years	Vertas	£0	£0	£12,120	£0	£0	£12,120	£0
IN48	Café/ Refreshment Area	Walls	Internal Walls	Redecorate walls with painted finish to match base specification	Every 3 Years	Vertas	£0	£454	£0	£454	£454	£0	£454
IN49	Café/ Refreshment Area	Ceilings	Internal Ceiling Finish	Redecorate ceiling to match base specification (Cost included in IN48)	Every 3 Years	Vertas	£0	£0	£0	£0	£0	£0	£0
IN50	Café/ Refreshment Area	Finishes	Internal floor finish	General Cleaning (cost included in IN05)	Daily	Vertas	£0	£0	£0	£0	£0	£0	£0
IN51	Café/ Refreshment Area	Finishes	Internal floor finish	Inspection of floor coverings. Allow for general repairs	Annually	Vertas	£50	£102	£102	£102	£102	£102	£102
IN52	Café/ Refreshment Area	Finishes	Internal floor finish	Renewal of floor finishes to match base specification	5 Years	Vertas	£0	£0	£1,464	£0	£0	£1,464	£0
IN53	General Staff Areas/ Document Rooms	Walls	Internal Walls	Redecorate walls with painted finish to match base specification	Every 7 Years	Vertas	£0	£0	£0	£0	£6,566	£0	£0
IN54	General Staff Areas/ Document Rooms	Ceilings	Internal Ceiling Finish	Redecorate ceiling to match base specification (Cost included in IN53)	Every 5 Years	Vertas	£0	£0	£0	£0	£0	£0	£0
IN55	General Staff Areas/ Document Rooms	Finishes	Internal floor finish	General Cleaning (cost included in IN05)	Daily	Vertas	£0	£0	£0	£0	£0	£0	£0
IN56	General Staff Areas/ Document Rooms	Finishes	Internal floor finish	Inspection of floor coverings. Allow for general repairs	Annually	Vertas	£50	£102	£102	£102	£102	£102	£102
IN57	Strongroom	Miscellaneous	Racking System	Inspect and service roller racking	Annually	Specialist contractor	£500	£1,010	£1,010	£1,010	£1,010	£1,010	£1,010
IN58	Exhibition Space	Walls	Internal Walls	Redecorate walls with painted finish to match base specification	Every 3 Years	Vertas	£0	£606	£0	£606	£606	£0	£606
IN59	Exhibition Space	Finishes	Internal floor finish	General Cleaning (cost included in IN05)	Daily	Vertas	£0	£0	£0	£0	£0	£0	£0
IN60	Exhibition Space	Finishes	Internal floor finish	Inspection of floor coverings. Allowance for general repairs	Annually	Vertas	£50	£102	£102	£102	£102	£102	£102
	TOTALS:						£29,887.50	£64,906.00	£85,410.00	£64,906.00	£71,472.00	£98,476.00	£64,908.00

Ref	LOCATION	ELEMENT	DESCRIPTION	PLANNED MAINTENANCE REQUIREMENT	FREQUENCY	RESPONSIBILITY	YEAR & COST						
							1	2 -3	4 - 5	6 -7	8 - 9	10 -11	12 - 13
-	-	-					2019-2020	2021-2022	2023-2024	2025-2026	2027-2028	2029-2030	2031-2032
ME01	All Floors	Mechanical	Actuators	Reaction to safely signal eg. Fire/ smoke, test to be undertaken	Every 6 Months	Specialist contractor	£2,500	£5,000	£5,000	£5,000	£5,000	£5,000	£5,000

ME02	All Floors	Mechanical	Boilers and flue service	Service boilers. Check flue condensate. Check water levels	Annually	Specialist contractor	£500	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000
ME03	All Floors	Mechanical	Gas Service	N/A	N/A	N/A							
ME04	All Floors	Mechanical	Ductwork, grill inspections and cleaning	VCD's and fire dampners to be checked	Every 6 Months	Specialist contractor	£2,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000
ME05	All Floors	Mechanical	Air Handling Units	Filters to be cleaned and replaced (6 months). Service, calibrate, test alarms and levels.	Annually	Specialist contractor	£2,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,001
ME06	All Floors	Mechanical	Air Handling Units	Seasonally clean and/or disinfect permanently or intermittently wetted surfaces within the air handling system	Every 6 Months	Specialist contractor	£2,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,002
ME07	All Floors	Mechanical	Heat Pumps	Service, recalibrate and check alarms	Annually	Specialist contractor	£4,500	£9,000	£9,000	£9,000	£9,000	£9,000	£9,000
ME08	All Floors	Mechanical	Refrigeration Systems and compressors	Service, recalibrate and check alarms	Annually	Specialist contractor	£400	£800	£800	£800	£800	£800	£800
ME09	All Floors	Mechanical	Fans and filters	Service fans and filters	Annually	Specialist contractor	£400	£800	£800	£800	£800	£800	£800
ME10	All Floors	Mechanical	Dehumidifier plant	Incl in AHU's	Every 6 Months	Specialist contractor	£1,500	£3,000	£3,000	£3,000	£3,000	£3,000	£3,000
ME11	All Floors	Mechanical	Vacuum	N/A									
ME12	All Floors	Mechanical	Hot and cold water	Service calorifier and expansion vessel and circulation pump	Every 2 years	Specialist contractor	£0	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000
ME13	All Floors	Mechanical	Hot Water	Check pressurisation vessels	Weekly	Specialist contractor	£1,000	£2,000	£2,000	£2,000	£2,000	£2,000	£2,000
ME14	All Floors	Mechanical	Water test including bacterial analysis and legionella tests	Hygiene risk assessment (ACOP L8)	Annually	Specialist contractor	£2,500	£5,000	£5,000	£5,000	£5,000	£5,000	£5,000
ME15	All Floors	Mechanical	Rainwater harvesting	Test pumps, drain, clean out tanks and change filters	Annually or as required	Specialist contractor	£500	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000
ME16	All Floors	Mechanical	Pipework system including valves and insulation	Inspect pipeworks system and allow for minor repairs	Annually	Specialist contractor	£500	£1,000	£1,000	£1,000	£1,000	£1,000	£1,001
ME17	All Floors	Mechanical	Radiators and under floor heating system	Bleed radiators/ manifolds	Every 6 months	Vertas	£1,000	£2,000	£2,000	£2,000	£2,000	£2,000	£2,000
ME18	All Floors	Mechanical	Pumps	Service pumps and valves	Annually	Specialist contractor	£500	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000
ME19	All Floors	Mechanical	Sanitary and waste water plumbing	Inspection and test	Annually	Specialist contractor	£1,000	£2,000	£2,000	£2,000	£2,000	£2,000	£2,000
ME20	All Floors	Mechanical	Controls, sensors and switching devices	Calibrate	Every 2 Years	Specialist contractor	£1,000	£2,000	£2,000	£2,000	£2,000	£2,000	£2,000
ME21	All Floors	Mechanical	Smoke Vents	Test		Specialist contractor	£500	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000
ME22	All Floors	Mechanical	Boiler System	Renewal of boiler, H&C	Boilers have an indicative life of 20 years								
ME23	All Floors	Mechanical	Air Handling Units	Renewal of Ventilation System	AHU's have an indicative life of 15 years								
ME24	All Floors	Mechanical	Heating system	Renewal of heating system and plumbing, humidifier servicing	5 Years	Specialist contractor			£1,500			£1,500	
ME25	All Floors	Mechanical	Air Source Heat Pumps	Renewal of air source heat pumps	ASHP's have indicative life expectancy of 20 years								
	TOTALS:						£24,300	£49,600	£51,100	£49,600	£49,600	£51,100	£49,604

Ref	LOCATION	ELEMENT	DESCRIPTION	PLANNED MAINTENANCE REQUIREMENT	FREQUENCY	RESPONSIBILITY	YEAR & COST						
							1	2 -3	4 - 5	6 -7	8 - 9	10 -11	12 - 13
							2019-2020	2021-2022	2023-2024	2025-2026	2027-2028	2029-2030	2031-2032
EL01	All Floors	Electrical	BS7671 Electrical safety	Routine Checks	Every 3 Months	Specialist contractor	£250	£500	£500	£500	£500	£500	£500
EL02	All Floors	Electrical	BS7671 Electrical safety test	Inspection and tests	Annually	Specialist contractor	£1,800	£3,600	£3,600	£3,600	£3,600	£3,600	£3,600
EL03	All Floors	Electrical	Fire Alarms	Thorough inspection and testing on power supplies, batteries/ chargers, controls, indicators, etc.	Every 3 Months	Specialist contractor	£600	£1,200	£1,200	£1,200	£1,200	£1,200	£1,200
EL04	All Floors	Electrical	Fire Alarms	Inspect and test alarm devices	Every 3 Months	Specialist contractor	£600	£1,200	£1,200	£1,200	£1,200	£1,200	£1,200
EL05	All Floors	Electrical	Fire Alarms	Thorough inspection and testing of all call points and response of all detectors/ sensors	Annually	Specialist contractor	£750	£1,500	£1,500	£1,500	£1,500	£1,500	£1,500
EL06	All Floors	Electrical	Fire Alarms	Attendance to faults with fire alarm system	As required	Specialist contractor	£500	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000
EL07	All Floors	Electrical	Lighting	Cleaning and inspection, lamp replacement	Annually	Vertas	£500	£1,000	£1,000	£1,000	£1,000	£1,000	£1,000
EL08	All Floors	Electrical	Emergency Lighting System	Basic inspection of the emergency lighting installation	Monthly	Specialist contractor	£1,080	£2,160	£2,160	£2,160	£2,160	£2,160	£2,160
EL09	All Floors	Electrical	Emergency Lighting System	Full duration tests	Every 3 Years	Specialist contractor	£100	£200	£200	£200	£200	£200	£200
EL10	All Floors	Electrical	Emergency Lighting System	Battery replacement	Every 5 Years	Specialist contractor	£1,000	£2,000	£2,000	£2,000	£2,000	£2,000	£2,000
EL11	All Floors	Electrical	Disabled toilet alarms	Check alarm system is operating correctly	Every 3 Months	Vertas	£120	£240	£240	£240	£240	£240	£240
EL12	All Floors	Electrical	Lighting Protection System	Full test and inspection of the system	Every 3 Years	Specialist contractor	£250	£500	£500	£500	£500	£500	£500
EL13	All Floors	Electrical	PAT testing	Full testing of electrical equipment	Annually	Specialist contractor	£400	£800	£800	£800	£800	£800	£800
EL14	All Floors	Electrical	Lift inspections	Thorough examination and testing of passenger lifts	Every 6 months	Specialist contractor	£750	£1,500	£1,500	£1,500	£1,500	£1,500	£1,500
EL15	All Floors	Electrical	Security systems	Full testing of system	Annually	Specialist contractor	£250	£500	£500	£500	£500	£500	£500
EL16	All Floors	Electrical	Electrical security locks	Service electrical locks and security fittings	Annually	Specialist contractor	£200	£400	£400	£400	£400	£400	£400
EL17	All Floors	Electrical	Photovoltaic System	Clean and inspect PV system	Annually	Specialist contractor	£180	£360	£360	£360	£360	£360	£360
EL18	All Floors	Electrical	Electrical Services - luminaires	Renewal of luminaires	Luminaires have expected life expectancy of 15-20 years								
EL19	All Floors	Electrical	Electrical Services	Renewal distribution, power and lighting	Distribution board and small power installations have an indicative life of 20-25 years								
EL20	All Floors	Electrical	Lightning Protection	Renewal of lightning protection	Lightning protection system should last the lifetime of the building as long as regular maintenance is undertaken								
EL21	All Floors	Electrical	Control System	Renewal of PC	Every 5 years	Specialist contractor			£2,000			£2,000	
EL22	Exhibition Space	Electrical	Exhibition Lighting	Testing and Maintenance	Annually	Specialist contractor	£250	£500	£500	£500	£500	£500	£500
	TOTALS:						£9,580	£19,160	£21,160	£19,160	£19,160	£21,160	£19,160

	GRAND TOTALS:						£75,168	£157,266	£191,770	£167,266	£163,832	£207,836	£157,272
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Appendix 4 – 10 year<sup>8</sup> Management and Maintenance Plan for Exhibition & Interpretation elements

Ref	LOCATION	ELEMENT	DESCRIPTION	PLANNED MAINTENANCE REQUIREMENT	FREQUENCY	RESPONSIBILITY	YEAR & COST							ASSUMPTIONS
							1	2 -3	4 - 5	6 -7	8 - 9	10 -11	12 - 13	
							2019-2020	2021-2022	2023-2024	2025-2026	2027-2028	2029-2030	2031-2032	
EX&I1	Exhibition Room, Semi-Permanent Display Points	Miscellaneous	Cases, setworks, interactives	Inspect for damage, allow for minor repairs	Monthly	SRO Team	£1,620	£3,240	£3,240	£3,240	£3,240	£3,240	£3,240	Allows for 1 SRO staff day per month
EX&I2	Exhibition Room, Semi-Permanent Display Points	Miscellaneous	All elements	Cleaning allowance (to be covered by main cleaning contract IN05)	Daily	Facilities Management								
EX&I3	Exhibition Room, Semi-Permanent Display Points	Miscellaneous	AV	Test AV installations	Annually	Facilities Management	£250	£500	£500	£500	£500	£500	£500	
EX&I4	Exhibition Room, Semi-Permanent Display Points	Miscellaneous	AV	Refresh AV installation hardware/software allowance	Annually	Specialist supplier				£57,000		£57,000		Assumes complete refresh software and hardware every 5 years
EX&I5	Exhibition Room, Semi-Permanent Display Points	Miscellaneous	AV	Refresh interactive AVs' content with new stories, curated material etc.	Weekly	SRO Team	£3,380	£6,760	£6,760	£6,760	£6,760	£6,760	£6,760	Allows for 1 SRO staff day per week
EX&I6	Exhibition Room, Semi-Permanent Display Points	Electrical	Specialist Lighting	Inspect specialist lighting (spots& track, cases), allow for light maintenance (included in EL23)	6 months	Specialist supplier								
EX&I7	Exhibition Room, Semi-Permanent Display Points	Electrical	Specialist Lighting	Inspect specialist lighting (spots& track, cases), allow for light maintenance	6 months	SRO Team	£270	£540	£540	£540	£540	£540	£540	Allows for 1 SRO staff day per 6 month period
EX&I18	Exhibition Room, Semi-Permanent Display Points	Electrical	Specialist Lighting	Specialist lighting (spots & track, cases), renewals	Annually	Facilities Management		£3,640	£3,640	£3,640	£3,640	£3,640	£3,640	Assumes renewal value at 4% of initial cost
	TOTALS:						£5,521	£14,680	£14,680	£71,680	£14,680	£71,680	£14,680	
						of which cash	£250	£4,140	£4,140	£61,140	£4,140	£61,140	£4,140	
						of which 'in kind'	£5,271	£10,540	£10,540	£10,540	£10,540	£10,540	£10,540	

<sup>8</sup> The plan forecasts 12 years to cover the 2 operational years that fall within the HLF funded Delivery Phase, plus 10 complete years after project completion

Appendix 5 – 10 year<sup>9</sup> Management and Maintenance plan for Digital Features

Ref	LOCATION	ELEMENT	DESCRIPTION	PLANNED MAINTENANCE REQUIREMENT	FREQUENCY	RESPONSIBILITY	YEAR & COST							ASSUMPTIONS
							1	2 -3	4 - 5	6 -7	8 - 9	10 -11	12 - 13	
							2019-2020	2021-2022	2023-2024	2025-2026	2027-2028	2029-2030	2031-2032	
DIG1	Virtual	Miscellaneous	Normalise the archives with The Hold's Personal Digital Assistant	Live chat function - 2 staff hours required per 1000 visitors: maintain function and interact with customers	Daily	SRO Team	£30,680	£61,360	£61,360	£61,360	£61,360	£61,360	£61,360	25 staff and 10 volunteer hours per week
				Wi-Fi Splash Screen	N/A	Included in CRM								Set up cost not ongoing cost
				Introductory videos (1 video, 2 minutes): refresh with new video content	Annual	SRO Team	£100	£200	£200	£200	£200	£200	£200	5 staff hours per annum
				PDA app maintenance of dedicated app	Annual	Specialist supplier	£1,500	£3,000	£3,000	£3,000	£3,000	£3,000	£3,000	
DIG2	Virtual	Miscellaneous	Open up the online collection to the world	Tutorials and online quests (per quest): refresh with new content	Annual	SRO Team	£400	£800	£800	£800	£800	£800	£800	20 staff hours per annum
				Alternative entries into collection (per entry): add 1 new entry point per annum to naïve interface	Annual	Specialist supplier	£4,000	£8,000	£8,000	£8,000	£8,000	£8,000	£8,000	
				GIS access to collection: maintain custom build	Ongoing	Specialist supplier	£1,500	£3,000	£3,000	£3,000	£3,000	£3,000	£3,000	
DIG3	Virtual	Miscellaneous	Create a citizen archive of contemporary Suffolk life	Story platform	N/A	N/A								Set up cost not ongoing cost
				Community building and moderation - 1 staff hour per contribution: promotion and moderation of crowd-sourced contributions	Weekly	SRO Team	£40	£80	£80	£80	£80	£80	£80	2 staff hours per week
				Content creation and curation	Monthly	SRO Team	£3,840	£7,680	£7,680	£7,680	£7,680	£7,680	£7,680	16 staff hours per month
				Content collections and event management: deliver events associated with the citizen archive	Monthly	SRO Team	£1,920	£3,840	£3,840	£3,840	£3,840	£3,840	£3,840	8 staff hours per month
DIG4	Virtual	Miscellaneous	Build digital capacity to train digital-savvy citizens	Regular meetups: organising costs	Monthly	SRO Team	£400	£800	£800	£800	£800	£800	£800	
				Regular meetups: 16 staff hours per meetup	Monthly	SRO Team	£3,840	£7,680	£7,680	£7,680	£7,680	£7,680	£7,680	16 staff hours per month
				Digital design challenge: 30-40 participants. Lower bound: no	Every six months	SRO Team	£2,000	£4,000	£4,000	£4,000	£4,000	£4,000	£4,000	

<sup>9</sup> The plan forecasts 12 years to cover the 2 operational years that fall within the HLF funded Delivery Phase, plus 10 complete years after project completion

[illegible]

[illegible]