

Competency reference number and title	C5. Providing (intellectual) access to the content of records and archives (web, finding aids, digitisation projects etc)
Level of attainment claimed	Level 3
Development period: Overall dates in which competency was developed for this assessment level	██████████

**Context**

*Give a brief outline of the context in which you developed this competency. For example, your previous and current job roles or responsibilities*

I achieved and continue to develop this competency whilst working as Archives and Customer Services Assistant at for ██████████ .

**Activity**

*Give a brief description and examples from your professional activity and practice which demonstrate your competency at this level. Link this section to the competency definition in the Framework.*

As part of a research service request I provided a client with 1417 digital images of documents from the ██████████ collection. The documents consisted of 8 pocket notebooks created by ██████████ and 3 large bundles containing correspondence, reports and other documents relating to ██████████ Limited and their lighthouse works (see supporting document: C5 - Enquiry Research Breakdown). I engaged with the client to discuss their research needs and offered advice on searching the ██████████ Community History and online catalogue so they could select the reference numbers for the documents they wished to have digitally re-produced. I provided information about procedures and the available options for obtaining images. Once instruction had been received, I provided an estimate of time-scale until completion and an estimated cost. This was based on an agreed set amount of hours of research charged at a set rate, with notice to be given if the project was to over-run the initially quoted time-scale.

Part-way into the project I enlisted the help of a colleague, a volunteer, and utilised work experience placement students when available. Alongside carrying out a large share of the work load I took charge of training each contributor in each task, assigned work to be undertaken, supervised each team member in their assigned duties and kept track of the overall progress of the project. Each document was scanned using an E-scan Digibook scanner onto an external hard drive. Occasionally, visual reference indicators were included to help in identifying certain documents. Each image was scanned to the client's specifications of 300 dpi and jpg format. The images then needed to be looked at individually for quality of reproduction and the files renamed for referencing reasons. Any images that were of an inadequate quality were identified during the file re-naming process and later rescanned to meet a professional standard.

Due to the volume of digital images taken, a reference tool in the form of a Microsoft Excel spreadsheet was developed (see supporting document: C5 - Enquiry Research Reference Tool). This provided metadata to the client including: reference number, date of document creation, extent and, as most of the images were of items of correspondence, author and recipient. A separate reference tool was created for each of the 3 large bundles. The data was recorded primarily to identify each scan should any issues arise in the future. The digitised images were then uploaded to a cloud storage facility and access given to the client to retrieve their items.

## **Progression & Learning**

*Give a brief summary of how your skills, knowledge and experience within this competency have developed or been maintained during this period. Include examples of the different skills, knowledge and experience developed and the types of learning undertaken such as formal training, study or research, work achievements, contributions to the profession etc.*

My familiarity with the [REDACTED] Ltd. collection meant that I knew the layout of the online catalogue. I was able to accurately refer the client to items relevant to their research. Experience in operating the E-scan Digibook scanner aided in efficient digitising of the documents and also helped when it came to training staff and volunteers in how to produce the best quality reproductions.

Knowing and following procedures for handling often fragile documents was important. Working quickly, this provided the consideration needed by myself and volunteers and ensured we maintained the condition of documents and minimising errors when re-producing. Basic experience in digital image editing helped with the cropping and occasional lightening of images to enhance the detail. Through overseeing the project I have learnt the importance of delegation and rotation of tasks when working in a large project such as this. This role has also given me practical experience in working to meet deadlines while obtaining the best results possible.

## **Reflection**

*Reflect on and evaluate what you have learned from the activities you have undertaken to develop or maintain this competency. For example, what went well/not so well? What would you do differently next time?*

Although the vast majority of digitised documents were of acceptable quality for the research undertaken, the need to revisit and retake several images was time consuming. I will be more vigilant in the future, encouraging volunteers and colleagues to more thoroughly use the image preview function on the overhead scanner. The rotation of roles for those involved with the project was beneficial to both the final product as well as staff/volunteer development. Skills were either freshly learnt or developed further and potential monotony did not set in, reducing mistakes. I was also able to use the project as a training exercise for any work experience placement students that we had.

This was the first time I, and the service, had undertaken a digitisation project of this size. I underestimated the time needed and cost incurred. Keeping the client up to date with progress made ensured that we could amend the deadline. Developing the reference tool added to the time taken. This was not foreseeable when quoting to the client, but the knowledge gained from this project puts the service in a more informed position to quote more accurately in the future. If I am involved in a project of this nature again I would develop a reference tool for the images at before starting. This would clarify how much information to include, helping balanced the need to provide an informative reference tool for the client with emphasis on ease of access. Perhaps the service should recommend the inclusion of a reference tool to clients as part of the research fee when negotiating a research request.

Initial issues arose identifying a suitable storage and delivery method. My preference of copying to a shared staff network drive was pursued but, due to the Council's policy of not permitting USB storage to be accessed on staff PCs, public PC's were used. Consequently, copying to the staffdrive was an arduous process as images needed to be emailed to an account accessible on staff PCs and due to the limitations of email capacity only 4 or 5 images could be sent at a time. Using the external hard drive was an easier method but access to the images is still only via public PC's and external hard drive.

**Follow Up**

*How have you applied your skills, knowledge and experience within this competency since? What do you intend to do next to maintain or further develop this competency?*

I have worked alongside colleagues to develop a template reference tool for future large scale digitisation projects. The essential elements to include in this tool were discussed and agreed upon as a team, balancing the need to include important details with the need for the tool to be quickly and easily updated. The skills I have developed have enabled me to efficiently timetable and delegate tasks and train staff and volunteers during other team projects we have undertaken. Through working on this project I feel I can deliver more accurate quotes to clients, and I also feel more confident in working on and completing a project of the size in the future.