

Accommodation Services Branch

7.4 Key business objectives for 2004-2005

- i. By 31 August 2004, ensure the next phase of the refurbishment programme for GRH is completed to time and budget;**
Work complete snagging work being undertaken.
- ii. By 31 December 2004, move the sasine records currently stored in the rear dome and within certain archive stores on the ground floor of GRH to a new location;**
Completed.
- iii. By 31 January 2005, ensure upgraded accommodation is in place for the digital reprographic unit (DRU);**
Tenders issued and returned. The tenders are currently being evaluated. The temporary relocation of the reprographic department to the old smoothing room is now complete.
- iv. By 31 January 2005, complete the design and contract documentation for the Scottish Family History Service to ensure the target commencement date of March;**
Tenders have been invited and will be returned during February.
- v. By 31 January 2005, prepare a design brief detailing the requirements for the proposed new TTH2 building;**
Work has commenced. However due to other commitments a revised target of 30 May was agreed.

7.6 Performance targets and workload measures

- 1. Ensure that all public search rooms are cleaned before 09.00 hours each day.**
This target is being achieved.
- 2. Ensure the tearooms are cleaned by 09.45 hours each day and that the offices, corridors, and toilets are cleaned efficiently to minimise disruption to staff, with all cleaning carried out by 12.00 hours each day.**
This target is being achieved.
- 3. Targets for productions to readers from records stored in same building: 92.5% within 30 minutes; to readers from records stored in another building: 95% within 24 hours.**
The records indicated that this target was met in full.
- 4. In 2004-05, achieve a reduction in NAS energy consumption by 10% compared with 2003-4 levels.**

This is still being monitored and we are now meeting our predicted energy targets.

Finance and Administration Branch

8.4 Key business objectives for 2004-05

- i. By 27 April 2004 (2 days before) and at each subsequent quarter, provide the required financial monitoring information for NAS Management Board and by 29 April 2004 (1 week before) and at each subsequent quarter for Governance meetings;**
Outcome: Being met.
- ii. By 30 June 2004, implement new Flexible Working Hours system;**
Outcome: Actual date was 30 August 2004, after a series of problems reading dual purpose ID cards. System now producing reports delivered by e-mail, resulting in a speedier service and reducing need to print reports.
- iii. By 30 September 2004, complete review of Fixed Asset Management system and make recommendations for changes to capitalisation thresholds, to ensure that NAS procedures are in line with Audit requirements;**
Outcome: The review highlighted discrepancies in treatment of some capitalised items and the proposed threshold of £1,000 will streamline records keeping. Discussion with external auditors will assist changes to the Fixed Asset Register, to a timetable to be agreed with PWC.
- iv. By 31 December 2004, review fees and charges and prepare a report to be submitted to the January 2005 Management Board meeting;**
Outcome: Trading Account and projected recovery rate established. Senior Management will consider presentation and timing of increased fees.
- v. Within 6 weeks of receipt of internal audit reports, provide substantive responses to action points.**
Outcome: Being met.

8.6 Performance targets and workload measures

- 1. Ensure 100% of payments made within 30 days of receipt of goods and invoice, or within other terms as agreed.**
Outcome: Average to quarter end is 96%. Internal follow-up action required to minimise approval delays.
- 2. Purchasing:**
 - Routine purchases: on receipt of approved requisitions, place order within 3 days;**
 - Sealed bid or OJEC procedures: on receipt of approved requisitions, agree outline procurement timetable with the requisitioner within 3 days.**
Outcome: Newly introduced ICT system confirms that orders are generally being placed within 3 days. Introduction of EASEbuy also implemented.

Sealed bid procedures / OJEC contracts: timetable agreed at outset and up to date.

3. Complete monthly debtor review within 2 weeks of month end, to ensure debtor management is effective.

Outcome: still progressing, but generally the number and value of outstanding debts are low. We have revised internal procedures to re-schedule the production of reminder letters, so that the objective will be consistently met.

4. Process FWH updates within 2 working days of their receipt in FAB.

Outcome: Met. The new ICT system assists by recording the elapsed time between approved on-line update requests and the flexi system being updated. Problems with on-line Attendance Management, which feeds into FWH system have now been resolved.

5. Reconcile attendance management reports from SE HR, within 2 weeks of receipt of information, to ensure that details are accurate.

Outcome: Met. FAB has streamlined the data processing, to highlight potential inconsistencies.

Information and Communications Technology Branch

No report was received for this quarter.

Conservation Services Branch

10.4 Key Business Objectives for 2004-05

- i. **By 30th June 2004, submit a draft preservation policy to the Management Board**
Still ongoing. Limited progress made due to pressure of other objectives and business.
- ii. **By 30 September 2004, submit report to the management board on options for dealing with existing surrogates**
In progress.
- iii. **By 30 September 2004, review current exhibition loan agreements within NAS and submit report to October Management Board**
No further progress. Revised form in use for RH5/6 exhibition loan ongoing.
- iv. **By 30 November 2004, complete review of and commence training on NAS Disaster Contingency Plan**
Ongoing. Call out numbers reissued and collated.
- v. **By 31st December 2004, survey 5 collections (ref GD) according to programme agreed with PRB and RSB**
Ongoing. Submitted request for assistance awaiting input from RSB/PRB. Progress to date: No further progress due to work on CH collections.

10.6 Performance Targets and workload measures

- 1 **To conserve 50,000 pieces during 2004-05**
10,524 pieces conserved October-December 2004. 66,966 total pieces conserved by 31 December 2004.
- 2 **Complete sealing of letters patent within 24 hours of receipt into NAS**
2 letters patent sealed October-December 2004 and invoices raised.
- 3 **Commence work on unbound RD23 and DI9 records for CLRb within 10 working days of receipt into CSB**
On target and in progress: core business activity. B1 member of staff permanently dedicated to this task.

Reader Services Branch

11.4 Key business objectives for 2004-05

- i. By 31 May 2004, plan the extension of opening hours of the Historical Search Room to increase public access to the records;**
Target met. The planning was completed but this initiative has been postponed for the time-being due to insufficient Repository staff volunteers.
- ii. By 31 August 2004, review NAS promotional material (in association with OEB) to ensure their continuing relevance and accuracy;**
An initial meeting with ORT staff was held in July to discuss how best to take this forward. A further meeting is planned in light of anticipated developments with the Scottish Family History Project.
- iii. By 31 December 2004, review the use of GIS in NAS and prepare a scoping paper for Management Board on possible further applications of GIS;**
On target. The report was completed and sent to Senior Management in December.
- iv. By 31 March 2005, revise 5,000 RHP entries on OPAC to identify where RHPs are in private hands or in other repositories, noting the availability of photocopies in NAS;**
Partly met. The catalogue has been updated. Checking the availability of photocopies has not been possible due to loss of the Assistant Plans Officer post based at TTH.
- v. Ongoing, ensure that the Scottish Family History Service project is running on time and to budget.**
Work on the Scottish Family History Service Project is running to schedule and within the agreed budget. A summary of progress can be found at the appendix.

11.6 Performance targets and workload measures

- 1. Produce replies to 87.5% of enquiries within 15 working days.**
Target met. The turnaround for correspondence within 15 days was 97.8%
- 2. Produce replies to 95% of enquiries within 25 working days.**
Target met. The turnaround for correspondence within 25 days was 99.4%
- 3. Produce 92.5% of extracts within 3 working days.**
Target met. 96% were produced within 3 working days.

4. Produce 100% of legal premium service copies ordered before 3.00pm on the same day.

Target met.

5. Create 1500 new catalogue entries for plans (ref RHP) for year 2004-05.

Not met. 160 plans were catalogued by the B3 this quarter. With the loss of the Assistant Plans Officer, the problems with CALM earlier in the year and training of new staff, this target will not be met. A request to change this target was submitted several months ago.

6. Catalogue 175 sets of microfilm per month, as part of the microfilm re-cataloguing project.

Met. We were struggling to meet this target in the first two quarters so a request to change it was submitted several months ago. In order to address this, however, the project work has been reorganised and staff are now cataloguing on a reel-by-reel basis rather than on a set-by-set basis. This means that actual throughput has increased. Although there is not a direct correlation, this quarter's figure of 530 reels is more than the number of reels catalogued on a set-by-set basis last quarter (227) because many sets in fact consist of just one reel.

Training and Development Centre

12.4 Key Business Objectives 2004-05

- i By 30 September 2004 organise and run 10 x half day seminars on the changes to the Performance Management System.**
Achieved. Seminars ran during August and September.
- ii By 31 October 2004, organise training on 'Dignity at Work' for Archive Attendants to aid communication and good practice across the office.**
Achieved. Three seminars ran during December.
- iii By 30 November 2004, seek and scrutinise completed PLPs and CDPs from all staff to enable timely and appropriate development opportunities to be arranged.**
Achieved as far as possible. 118 PLPs and 8 CDPs received and actioned by end December.
- iv By 31 March 2005, organise 4 lunchtime seminars to increase staff awareness of NAS projects and initiatives and to provide the opportunity to learn about subjects of wider SE or other interest.**
On target. Three already held, seminar scheduled for 3 March on Back Care, further seminars on Energy Efficiency EAP in the pipeline.
- v By 31 March 2005, organise tours of GRH, WRH and TTH for staff from the other buildings.**
Change to objective. It has proved difficult to organise speakers for these tours. In future and where there are spaces, longer serving staff will be asked if they would like to join inductees on their tours (next tours to TTH and WRH are scheduled for February).

12.6 Performance Targets and Workload Measures

- 1. Respond to all appropriate staff training requests (approximately 150 per annum), by arranging training on the date specified;**
104 training events organised between 1 October and 31 December.
- 2. Hold tours of GRH, WRH & TTH and induction seminars for new NAS staff quarterly;**
Ongoing.
- 3. Request personal learning logs for each major piece of learning undertaken by staff within 1 week of completion for external providers; within 3 months to assess affect on performance and business benefit.**
Ongoing.

Senior Management Branch

13.4 Key business objectives for 2004-05

- i. By 31 October 2004 develop new draft strategies for income generation and marketing.**
A draft Customer Services Strategy, Revenue Generation Strategy and an Advocacy Strategy have been drawn up and are currently being reviewed.
- ii. By 31 December 2004, agree joint project with Registers of Scotland to Digitise the Register of Sasines.**
On target.
- iii. By 31 December 2004 have systems in place to deal with Freedom of Information requests.**
Work in progress
- iv. By 31 January 2005 hold away-days for all staff: by 28 February 2005 hold bilateral meetings with Branch Heads and produce a first draft of the Corporate Plan: and by 31 March 2005 produce final version of the Corporate Plan.**
N/A

13.6 Performance targets and workload measures

- 1 Respond to customer complaints in 10 working days.**
All responses have met the deadline
- 2 Respond to Freedom of Information enquiries within the deadlines specified in the legislation (20/30 days).**
N/A

Appendix

Scottish Family History Service Project – Update

Work on the Scottish Family History Service Project is running to schedule and within the agreed budget. Progress on key areas can be outlined as follows:

Accommodation

A detailed project brief has been agreed and stage E costings for the accommodation work were completed in December 2004.

Subsequent to the submission of a notice in the Official Journal of the European Communities (OJEC), 17 contractors expressed an interest in submitting a tender for the SFHS construction work in November 2004. According to the agreed contractor selection procedures, 6 contractors will subsequently be invited to tender.

A Gateway Review of the project was completed in November 2004.

Internet

Work on developing the joint website remained on schedule and within budget.

IT

Consultants were appointed to advise on the IT aspects of the project in November 2004. Work on the detailed system specification is continuing.

The digitisation of the registers held in the Court of the Lord Lyon was completed in December 2004.

Charging and Service Definition

Work continued on detailing the range and type of services to be offered by the SFHS.

Branding

The new brand for the new Scottish Family History Service was successfully registered as a trademark in December 2004.