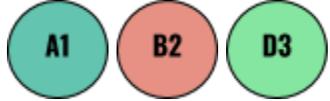


8. Appendix

Curatorial Action Plan - Phase 1

(Procedures & Preparation)

OBJECTIVE:	Define and Expand Data Types & Resource Types				RELATED LONG-TERM AIMS: (A star signifies that the aim has been fulfilled)	
Business Case: Establishing clear definitions will aid resource discovery and reduce duplication of effort and data redundancy						
Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Document data type definition on internal wiki	JO'B	01 Sept 2020	30 Sept 2020		Designated staff time Requires final team review
2	Document resource type definition on internal wiki	JO'B	01 Sept 2020	30 Sept 2020		Designated staff time Requires scoping of existing thesauri, creation of list, and final team review
3	Add resource types to database structure plan	JO'B/PY	01 Oct 2020	31 Oct 2020		Designated staff time Requires previous actions (1-2) to have been completed. Requires review by Application Developer
4	Create spec for tool/interface to add resource types to objects.	JO'B/PY	01 Oct 2020	31 Oct 2020		Requires previous actions to have been completed. Requires review by Application Developer
5	Identify collection(s) to apply new	JO'B	01 Sept	30 Sept		Designated staff time

resource types to as a proof-of-concept	2020	2020
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OBJECTIVE:	Implement Social Media Tags To Facilitate Effective Promotion On Social Media	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case: User engagement with ADS content via Social Media is now significant. Structured campaigns have been shown to be successful, especially for reaching audiences beyond typical users. Will maintain a profile of ADS within the heritage sector, and help raise profile within related disciplines.

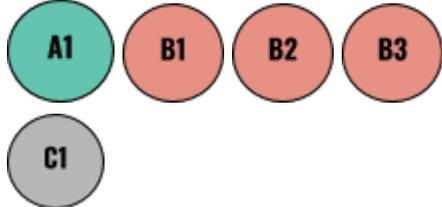
Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Document social media requirements	OF/TKZ	01 Sept 2020	30 Sept 2020		Designated staff time Short review with Communications Scrum team and Deputy Director
2	Develop social media calendar of events	OF/TKZ	01 Sept 2020	30 Sept 2020		Designated staff time Short review with Communications Scrum team and Deputy Director
3	Identify collection(s) to apply social media tags to as a proof-of-concept	OF/TKZ	01 Sept 2020	30 Sept 2020		Designated staff time

OBJECTIVE:	Implement Collection Creation As Part of Core Archiving Procedures	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case: To increase user engagement with Collections and enhance options for user Discovery; to increase ADS Staff engagement with holdings, thus increasing accuracy and consistency of metadata

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
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1	Create Collection creation procedure	JO'B	01 Oct 2020	31 Nov 2020		Designated staff time Review with Deputy Director
2	Create spec for Collection creation tools (e.g. pick objects as we go over the year - no/little extra time on normal archiving etc.)	JO'B	01 Dec 2020	31 Jan 2021		Designated staff time Review with Deputy Director and Application Developer
3	Create multi-collection web template	JO'B	01 Mar 2021	30 April 2021		Designated staff time Application Developer
4	Create example (proof-of-concept) collection	JO'B	01 Aug 2021	31 Aug 2021		Designated staff time

OBJECTIVE:	Implement Cataloguing as part of Core Archiving Procedures	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case: To increase accuracy and consistency of Collection and OMS Metadata; to increase ADS Staff engagement with holdings;

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Create collection-level cataloguing procedure (for current practice)	JO'B	01 Sept 2020	31 Nov 2020		Designated staff time Requires current review of CMS to be completed and review by Deputy Director
2	Create spec for object-level cataloguing tools	JO'B/TE/PY	01 Dec 2020	31 Jan 2021		Designated staff time Requires review by Deputy Director and Application Developer
3	Create method for metadata appraisal	JO'B	01 Feb 2021	30 Mar 2021		Designated Staff time
4	Create object-level cataloguing policy and	JO'B	01 Jun	31 Aug		Dependency: decisions need to be

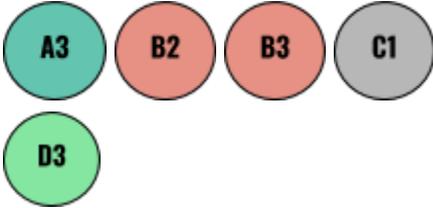
procedure		2021	2021		made regarding wordlists, standards etc.
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OBJECTIVE:	Add the ADS & Its Collections to the National Archives 'Discovery' Catalogue and review options for similar signposting opportunities.	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case: Increase profile of ADS and archives it holds; increase access to ADS Data

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Register for ARCHON ID and Add ADS as a repository on 'Discovery'	JO'B	01 Sept 2020	30 Sept 2020		Designated staff time
2	Investigate requirements to add collection information to 'Discovery' spreadsheet template	JO'B	01 Sept 2020	30 Nov 2020		Designated staff time
3	Create spreadsheet of collection information to 'Discovery' Template	JO'B	01 Sept 2020	30 Nov 2020		Designated staff time Potentially Application Developer required
4	Look into methods for routine update to 'Discovery'	JO'B	01 Sept 2020	30 Nov 2020		Designated staff time Potentially Application Developer required
5	Map requirements of all updates to external metadata holders (e.g. MEDIN etc.)	JO'B/TE	01 Sept 2020	31 Dec 2020		Problem: Heritage Gateway is changing but we don't know how
6	Consolidate methods for routine updates to all external network	JO'B/TE/PY	01 Apr 2021	31 May 2021		
7	Using the 'Discovery' experience as a case study, undertake an assessment of other external catalogues for prioritisation during					

	the same review period.					
8	Review annually		01 July 2021	31 Aug 2021		

OBJECTIVE:	Implement Internal Catalogue (OMS) Interface	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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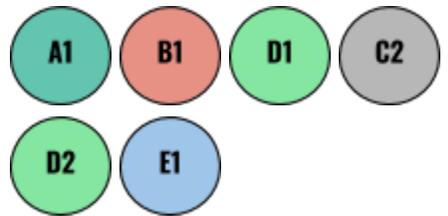
Business Case: To facilitate updating of OMS

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Identify sub-set, or collection to be worked on as a 'proof-of-concept'	JO'B	01 Apr 2021	30 Apr 2021		Designated staff time
2	Create interface based on spec from cataloguing objective	PY	01 April 2021	30 Jun 2021		Requires 'Implement Cataloguing as part of Core Archiving Procedures' Objective 2 to be completed Requires designated Application Developer time Ensure a mid-term review point is on place Plan for phases of work to enable agile development and achievable/desirable elements.
3	Test interface	JO'B/TKZ/O F	01 Jul 2021	31 Jul 2021		Designated staff time from across curatorial team
4	Report on results and impact	JO'B	01 Jul 2021	31 Jul 2021		Designated staff time
5	Document system changes and dependencies	PY/JO'B	01 Aug 2021	31 Aug 2021		Designated staff time Requires Application Developer to

						document impact on systems
6	Add use of object catalogue interface to cataloguing procedures	JO'B	01 Aug 2021	31 Aug 2021		Designated staff time

Curatorial Action Plan - Phase 2

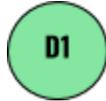
(Documentation & Display)

OBJECTIVE:	Upgrade the OMS to a new version	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case:

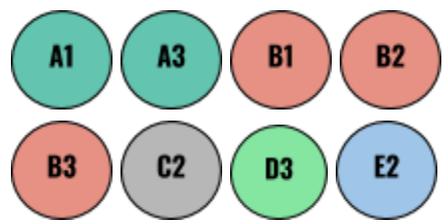
Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Audit existing OMS	JO'B	2020			
2	Redefine objects/entities	JO'B/TE				
3	Create plan to include all documents in the new OMS	JO'B/TE				
4	Create data model for new OMS	JO'B/JPG				
5	Create cost benefit analysis of moving from Oracle to PostGreSQL					
6	Identify and map fields to a data dictionary					
7	Document requirements to update web					

	pages and systems to make use of updated database.					
8	Build database					
9	Document database					
10	Migrate data					
11	Write program of work for updating website and applications.					

OBJECTIVE:	Display Archivist Intervention At Object Level	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	 
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Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Create spec for new object page, or object metadata view on archives pages.					
2	Identify case study collection					
3	Set up views to relevant data	JPG/PY				
4	Display preservation pathway on the object page/metadata view					
5	Display metadata source and version on the object page/metadata view	JPG				

OBJECTIVE:	Undertake Thematic Cataloguing Projects	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Identify potential themes					
2	Create a programme of work based on the themes identified					
3	Using form templates/cataloguing interface, get volunteers/placements/communities/online communities to catalogue/enhance the catalogue					
4	Create report/visualisation of results					

OBJECTIVE:	Redevelop 'Browse' Collections	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Write an assessment of other archives' browse facilities					

2	Identify different parameters to 'browse by', e.g. Timeline, Location, Theme, Release History					
3	Use thematic collections underway/created already as a starting point					
4	Create mock-up					
5	Remove the current list, or retain but among the other options as shown above					

Curatorial Action Plan - Phase 3

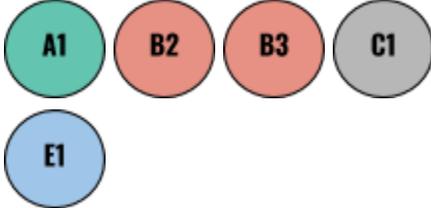
(Web & Community Development)

OBJECTIVE:	Implement signposting between related collections and objects	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Write an assessment of other archives' signposting features and effectiveness					
2	Identify and explore different options for signposting on the website based on the results of the assessment					
3	Identify a sub-set of related collections					

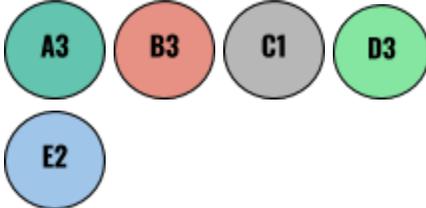
4	Identify a sub-set of related objects					
5	Create a case study where the different relationships are documented in the CMS/OMS					
6	Write a workflow summary of the required steps necessary in order to get the relevant information to be added to the database and display on the website					
7	Create a functional specification for a programmatic method/GUI for undertaking signposting tasks					
8	Create a procedure document as to why, when, and how archivists find and mark collection and object associations					

OBJECTIVE:	Implement map-based searching of collections	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Write an assessment of other archives' map features (in terms of different ways of querying/filtering as well as different methods of displaying results) and effectiveness.					
2	Create list of functionality requirements from web assessment above and HERALD					

	feedback					
3	Identify a sub-set of collections to search					
4	Create a test case map search of the above collections investigating functionality as identified above - repurpose HERALD map functions where appropriate/possible					
5	Get user feedback on the case study map search					
6	Based on case study and user feedback, create spec for implementing map search across all collections					
7	Create map based on spec					
8	Document the project, map functionality, system dependencies, and procedure					

OBJECTIVE:	Allow external tagging of images	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Investigate installing metadata games (or similar) for object tagging					
2	Test internally on a single collection					
3	Create a case study sub-set of images to be					

	tagged as a volunteer project					
4	Visualise and report on results					
5	Assess and measure the success of the case-studies as well as the ADS resource required during the project					
6	Create a cost-benefit analysis of undertaking further tagging projects					
7	Identify further self-contained projects and set up as 'games' (or similar)					

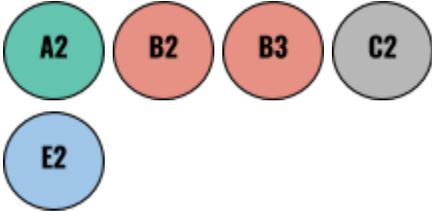
OBJECTIVE:	Create a single search facility on the website	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Sort out CMS external relationship issues					
2	Write an assessment of other archives' search facilities, look at the presentation of the search feature, different elements that a single search retrieves and advanced search options.					
3	Invite user comment through survey (involve university staff and students), identify any previous user feedback from ADS Library project, IT Services experience and any relevant similar undertakings by					

	Universty of York Library/Borthwick Institute					
4	Define required search parameters needed, e.g. identifiers, OASIS IDs etc.					
5	Identify what is needed for a single search					
6	Identify what is needed for an advanced search					
7	Create a spec for a new search facility based on the data gathering exercises above					
8	Implement search facility					
9	Add objects to single search over time on completion of mandatory field entries and checks as laid out in the cataloguing policy					
10	Document the project's process, changes, the functionality of the search and its dependencies					
11	Explore ways to receive user feedback on the website (e.g. emoji faces). 'Did you find					

	what you were looking for?’					
12	Review on an annual basis					

OBJECTIVE:	Implement An Annual ‘Catalogue Day’	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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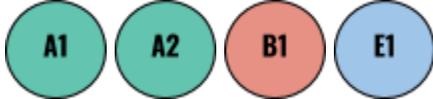
Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Identify projects to report on from the last 2-3 years					
2	ADS Catalogue Day - showcase results/progress of projects such as: Image tagging project; MAp Project Thematic Project from Year Two					
3	Idea: ‘York Archives Day’ (featuring Borthwick, York Archives, Minster Archives, University Library, St. John’s etc. - see NA ‘Discovery List of York Repositories.					
4	Acknowledge contribution of volunteers and communities (send special invites to contributors)					
5	Identify future projects and sign people up then and there.					
6	Get feedback on catalogue projects via					

	paper form at the end of the day					
7	Revisit on an annual basis					

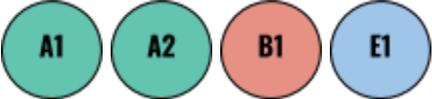
Curatorial Action Plan - Phase 4

(Branding & Expanding)

OBJECTIVE:	Host Archsearch Externally	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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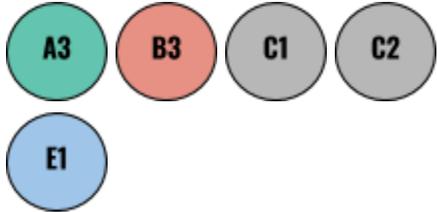
Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Define purpose of Archsearch going forward					
2	Examine Ariadne+ capabilities for providing metadata search					
3	Starting with a sub-set of records, use externally held metadata/search interface to interact with the thin records					
4	Create a cost-benefit analysis of hosting Archsearch thin records externally					
5	Implement and review as appropriate					

OBJECTIVE:	Host Library Externally	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Define purpose of the Library (bibliographic index) going forward					
2	Examine wikidata capabilities for providing bibliographic index search					
3	Starting with a sub-set of records, use externally held metadata/search interface to interact with the thin records					
4	Create a cost-benefit analysis of hosting bibliographic thin records externally					
5	Implement and review as appropriate					

OBJECTIVE:	Develop The Catalogue As A Brand In Itself	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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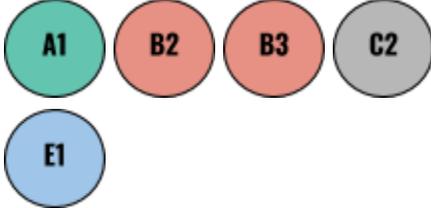
Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
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1	Write an assessment of other archives' catalogue pages, particularly looking at how they are distinguished from any other services the archive may provide search options.					
2	Collate user feedback on catalogue - reach out to user groups from communities built over the past few years					
3	Conduct market research					
4	Employ/train staff in branding/marketing/web design					
5	Mock up options for catalogue website					
6	Create 'stand-alone' new 'Digital Heritage Catalogue'					
7	Review on an annual basis					

Curatorial Action Plan - Phase 5

(User Engagement & Interaction)

OBJECTIVE:	Implement IIIF for Image Viewing and Interoperability	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
Business Case:			

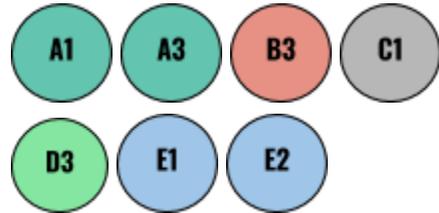
Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
1	Continue to assess IIIF uptake, practicality and functionality					
2	Liaise with archives that already have IIIF to get specifics as to how long implementation took, system, staff, and time requirements					
3	Conduct research as to system requirements					
4	Define staff and time requirements					
5	Define options for how IIIF would interact with existing systems and workflow					
6	Examine alternatives					
7	Write cost benefit analysis					
8	Create a report on the specifics					
9	Review over the years					
10	Work towards implementation					

OBJECTIVE:	Provide Visualisations For the Data/Metadata We Hold	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case:

Priority	Action Item	To be undertaken by:	Start date	End date	Progress	Resources required & dependencies
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1	Assess the various ways vi that other archives/museums visualise their data/metadata					
2	Investigate ways in which these visualisations can be created					
3	Identify a collection (or query (or multiple collections or queries) as a case study to work on					
4	Present the questions or collections at a hackathon event (or simply a class) and challenge attendees to create stories and visualisations of the data					
5	Present these projects at a 'Catalogue Day'					
6	Identify ways in which the results of the hackathon could be integrated into the online catalogue as a service for users (i.e. generating reports and visualisations of their queries/searches, or even of their data (such as specialist data spreadsheets once deposited? E.g. if mola submits data in standard ways, perhaps we could create visualisations across their collections (a USP distinguishing us from the BL perhaps?))					

OBJECTIVE:	Allow Users To Engage With & Create Collections	RELATED LONG-TERM AIMS (A star signifies that the aim has been fulfilled)	
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Business Case:

Priority	Action Item	To be	Start	End date	Progress	Resources required &
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		undertaken by:	date			dependencies
1	Assess potential to save IIF user activity as 'Projects'					
2	Revisit the 'my ADS' concept, but allow users to save individual objects as a collection, with an option to save, download, or publish their collections					
3	Create internal case study					
4	Invite students from other universities/disciplines to find objects relating to their interests among our heritage-specific collection and create their own collections.					
5	Publicise these new collections at 'Catalogue Day'					
6	Whenever someone creates a collection, invite them to blog about it.					