

## B.1 Managing the HER

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## B.1 Managing the HER#

Although there are variations in local arrangements, each HER provides an information management service within a larger organization. Every HER has information assets, in its databases and references collections, and each provides services to users. All HERs have resources in their staff, equipment and the finances that support information services. These all need good management, particularly as resources are scarce and HER managers are increasingly being asked to demonstrate the efficiency and effectiveness of their services in competition with others.

Managing an HER is like running a small business in which HER managers are asked to promote the value of their services and prioritise the allocation of scarce resources to meet competing demands. Time will always be limited and the purpose of this section of the manual is to provide guidelines on planning and management issues common to all HERs, which are described below.

### Policy and Planning#

Policy and planning documents help HER managers to get the most out of limited resources and provide a framework for making decisions in a rapidly changing world. The importance of such documents is recognised by their use as measures of HER performance in [Historic Environment Records: Benchmarks for Good Practice \(Chitty 2002\)](#). The policy documents defined in this document as 1st stage performance indicators are:-

- Information services policy (1.1 - 1.2). This explains why the record is maintained, who it aims to serve and how users can access the data.
- Information policy (2.1 - 2.3). This outlines the scope, geographical coverage and content of the information available and a disposals policy for transfer of primary archives.
- Recording Manual (3.1 - 3.4). This explains how data is captured and how it is recorded to provide quality assurance and includes guides and an index to supporting reference collections.
- Security policy (3.5, 3.8). This deals with strategies for appropriate archiving of digital and non-digital material as well as the preparation of a risk assessment and disaster plan.
- Forward Plan (3.6, 3.7). An ongoing assessment of the quality of data and a prioritised programme of update and enhancement requirements.

### Staff training and continuous professional development#

Retaining appropriately qualified staff to run the HER is essential for providing high quality information and advisory services. Management activities in this area include seeking additional staff resources (for projects or to increase the core complement) and preparing a training and development plan for existing staff members. The preparation of a Recording Manual will facilitate staff training and professional development.

## **Content#**

The information contained in HERs is continually developing. Management activities in this area include planning programmes of information capture in line with the HER's Recording Policy, local or regional research frameworks and national data standards. HER managers will be monitoring and validating input to the HER database and, if appropriate, the GIS and the cataloguing and storage of HER collections. They are also likely to be working with planning archaeologists to develop proformas for digital data to be included in briefs and developing licenses for material deposited with the HER. Increasingly they will be working with systems designed to facilitate information flow between archaeological organisations (for example OASIS see [B.5.4](#), [C.7.3](#)). Managing data standards and the wordlists or thesauri in use in the HER and contributing to national standards working parties is another important aspect of this work.

## **Information technology#**

The speed of new developments in information technology (IT) means that in many places computer hardware and software is on a 3 to 5 year replacement cycle. HER managers need to work within any corporate IT policies to plan for the replacement of hardware such as PCs and for the migration of data into new information systems. HER managers need to be aware of the range of software their corporate IT department are prepared to support when assessing the potential of new information systems as part of their Forward Plan. A day-to-day aspect of their work will be backing up the HER's computer systems and making sure that the Security Policy contains a strategy to restore services in the event of a range of potential problems.

## **Access and services#**

Services offered by HERs, both internally and to the public, are likely to be kept under review by local authorities or parent organisations. Because of this an important aspect of the work of an HER manager is putting procedures in place to log the number and type of enquiries to the HER, monitor user satisfaction and survey user needs as outlined in the Information services policy. Government initiatives have highlighted the need to increase access to HERs (refs; see Section F). HER managers should be involved in planning to improve and develop the information services offered. HER managers should also be involved in preparing bids for funding to the Heritage Lottery Fund or other funding sources to improve access and services.

## **Useful web sites#**

[OASIS](#)

[ALGAO and English Heritage "Historic Environment Records: Benchmarks for Good Practice"](#)