

Surveying and saving business records: The Scottish Experience

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Surveying in Scotland: a potted history

- Early pedigree of collecting from 1960s at UofG
- 1969 to 1977 series of three regional surveys
- Long-standing **partnerships** between organisations (BACS, NRAS/NRS, UofG, Ballast Trust)
- De-industrialisation and changing economy led to increase in archive rescue work
- 1977 full-time surveying officer post funded by Business Archives Council of Scotland and Scottish Record Office (NRS) until 2011
- 2014 this post is re-established by the Ballast Trust
- Is the Scottish sector unique? Our size, connectedness and history certainly makes us different

Are we unique? Not quite...

- Range of thematic surveys for UK business archives during the period 1972 to 2011
- 1980-1984 BAC surveyed 1000 oldest companies in England and Wales and started a series of sectoral surveys
- National Archives of Ireland has had a Surveyor of Business Records in place since 1970
- Centre for Business History in Stockholm founded in 1974 as a local initiative of the Chamber of Commerce and the City Council. 32 staff members, 7,000 company archives and a budget of 4 million!
- America has 'field archivist' roles in many collecting repositories eg Louis Jones at Wayne State University, Detroit and the work of the History Factory which carries out surveys for private companies

The Ballast Trust

- Provides a rescue, sorting and cataloguing service for business archives with an emphasis on technical records.
- Founded by William Lind in 1988 (links to BACS) and has had a professional archivist since 2009
- Has processed over 60 business collections - often huge volumes of records and worked with S/O in past
- In 2014 re-established the Surveying post with a consortium of funders and since 2015 has solely funded the role
- In 2021 awarded funding from the National Archives Covid-19 fund for a project called *FIELDWORK: Mapping Scotland's Business Archives*

Business Archives Council of Scotland (BACS)

- Established in 1960 by a group of businessmen, lawyers, chartered accountants, librarians and academics and archivists.
- In 1977, the work of the Council was at a level that a permanent employee was required – Surveying Officer
- By 2011 the BACS had carried nearly 600 surveys
- 2014 BACS were one of the consortium of funders to work together to re-establish the role of Surveying Officer

University of Glasgow

- Home of the Scottish Business Archive (many collections were brought in by Surveying Officer)
- Collections inaugurated by Sydney Checkland in 1959 and have been managed by the University archives since 1975
- The Surveying Officer has been hosted by University archive service since its establishment and is a University employee today (along with Ballast Trust archivist)
- A key partner in the fieldwork project with their business archives cataloguer being seconded to it

National Records of Scotland and NRAS

- 1969 to 1977, the National Register of Archives Scotland (NRAS) set up three regional surveys of private records
- Commitment in 1978 to provide sustained core funding for the BACS surveying officer (ended 2011 but has provided a one-off grant in 2021)
- Continuation of strong links with NRS/NRAS and Surveying Officer as surveys are routinely passed to NRAS
- Key partner in FIELDWORK project as we have made use of surveys held by NRAS when going back out to businesses

UK Crisis Management Team

A volunteer team set up as a result of National Strategies for Business Archives in England & Wales (2009) and Scotland (2011).

<https://managingbusinessarchives.co.uk/getting-started/business-archives-risk/crisis-management-team/>

Team co-ordinates efforts to preserve business records in cases of liquidations, administrations, takeovers and other circumstances where records may be in danger. But how?

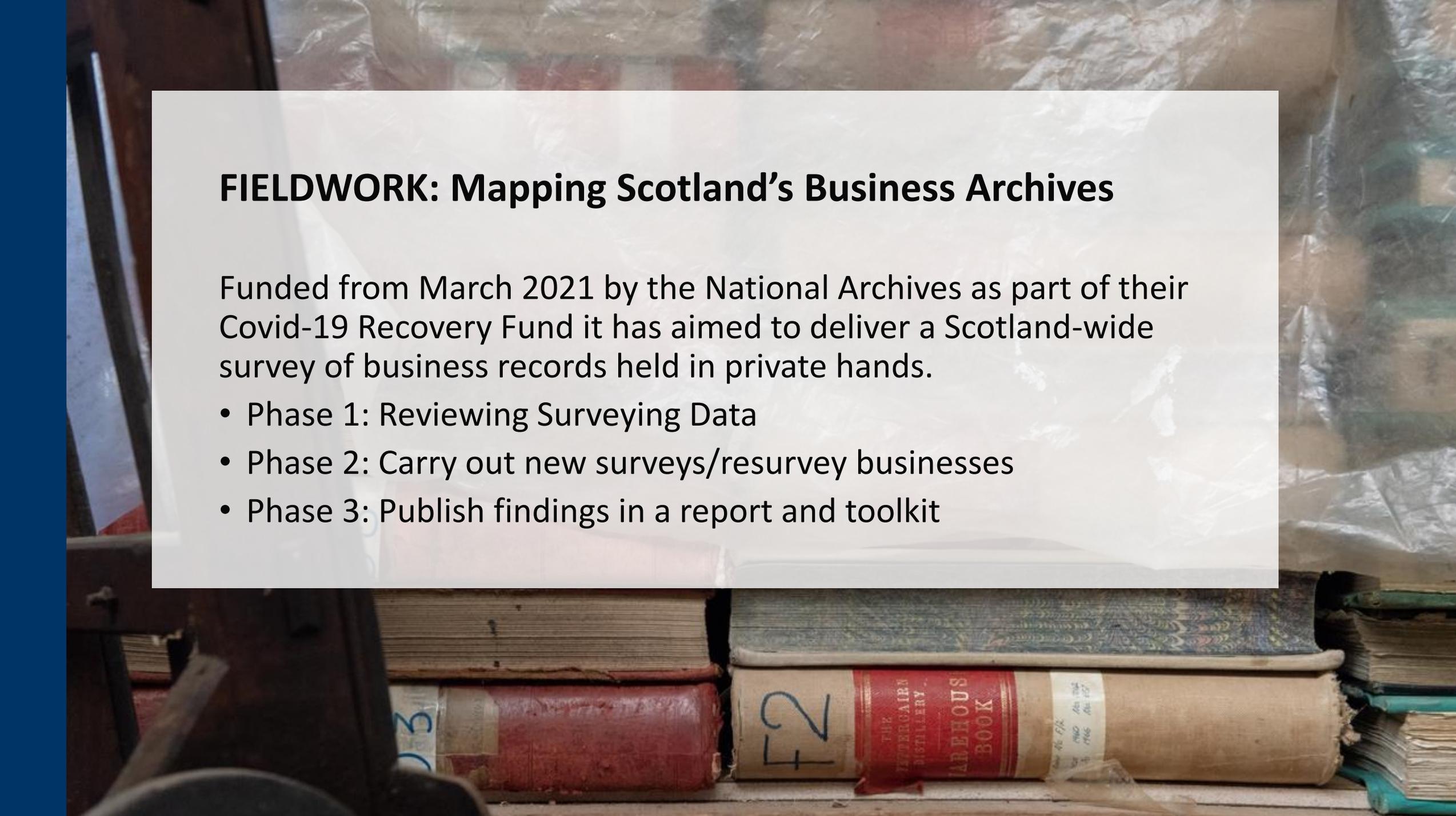
- Three meetings a year
- Joint spreadsheet
- Regular emails when cases arise

CMT work in Scotland: Between 2014-2020 investigated 25 cases and had 50% of cases result in a deposit.

FIELDWORK: Mapping Scotland's Business Archives

Funded from March 2021 by the National Archives as part of their Covid-19 Recovery Fund it has aimed to deliver a Scotland-wide survey of business records held in private hands.

- Phase 1: Reviewing Surveying Data
- Phase 2: Carry out new surveys/resurvey businesses
- Phase 3: Publish findings in a report and toolkit



Phase 1: Review

Examined data from surveys carried out by previous Surveying Officers and Registrars

- BACS database
- NRAS
- 100 Oldest Businesses

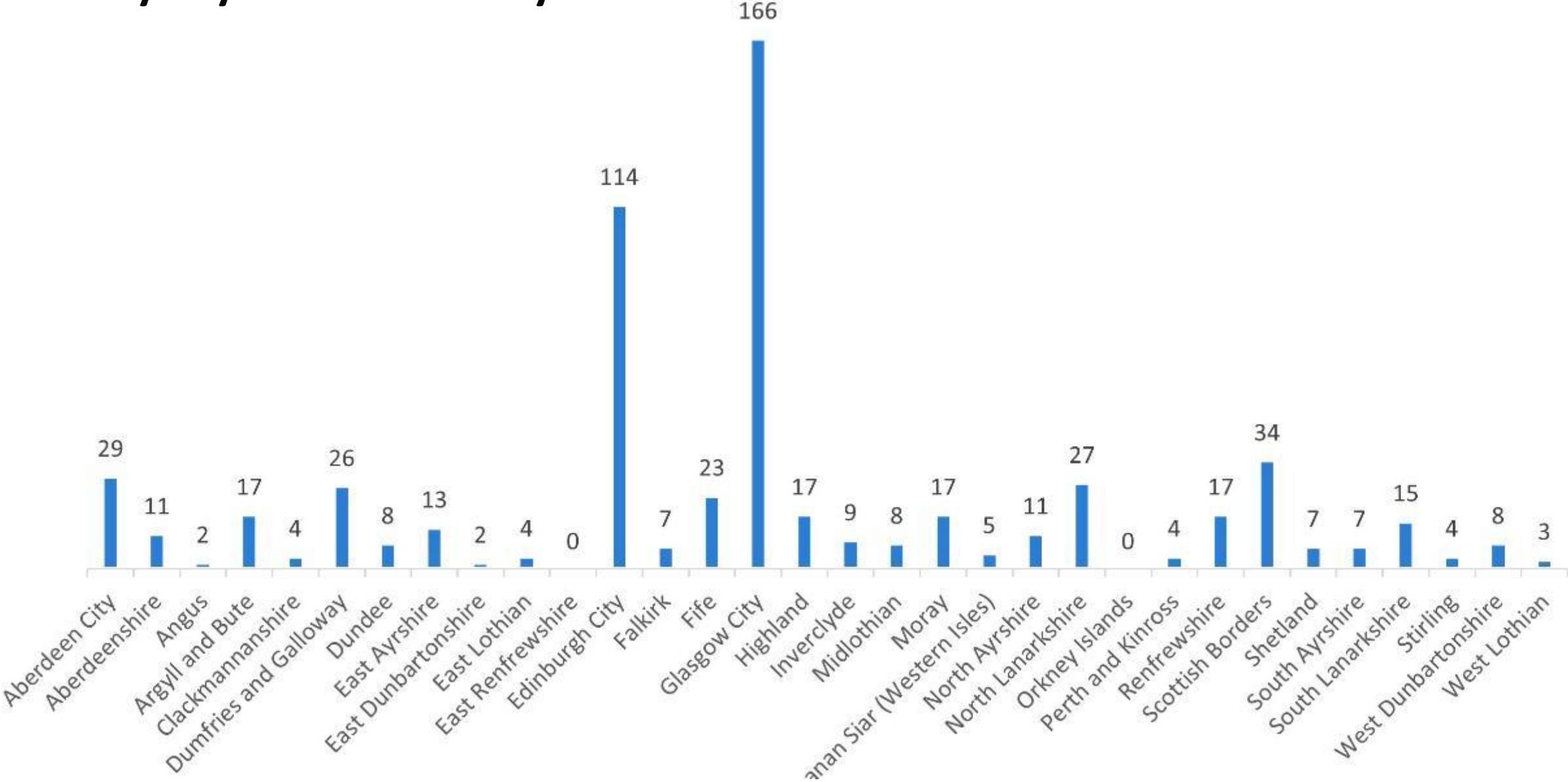
As well as identifying businesses with potential collections not surveyed from sources like:

- Publications - Business Insider Top500 & Scotland's Oldest Family Firms
- Business network lists, chambers of commerce members etc.
- General spotting (eg adverts, lorries on motorway, shop fronts)

Findings

- 622 recorded surveys
 - 245 collections deposited (39%) in c.30 different public repositories
 - 311 still with business (presumed) or in private hands (50%)
 - 62 location unknown (10%)
 - 4 destroyed or believed destroyed (0.6%)
- 214 new business identified for potential survey
 - Largest sectors represented are manufacturing and retail
 - Includes businesses established in 18th, 19th and 20th centuries (range: 1774 –2000s)

Surveys by Local Authority Area



140

Industry and Business Sector Representation

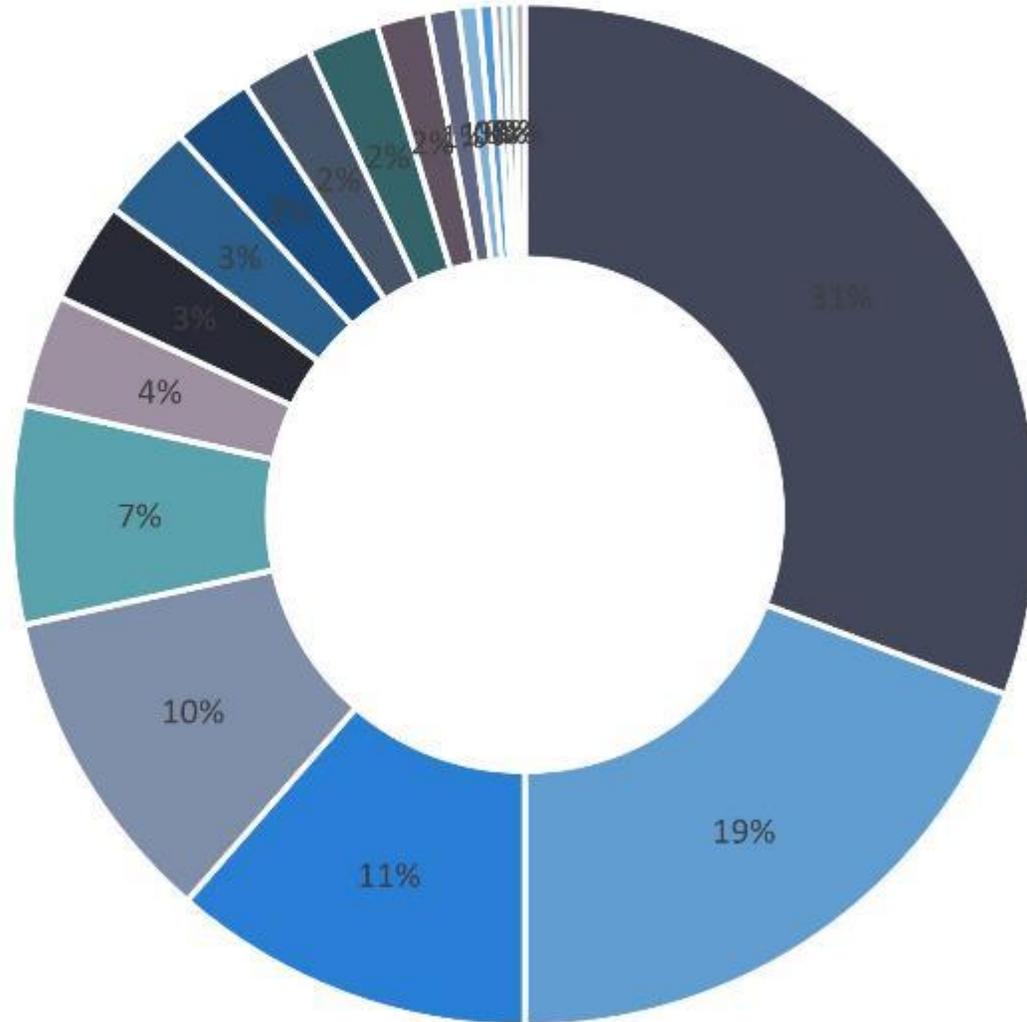
Majority of businesses surveyed belong to following SIC sectors:

- Manufacturing (31%) eg drinks, textiles, food and machinery
- Other service activities (19%) eg trade unions, professional associations and trade bodies, churches
- Wholesale and retail (10%) eg bakers, grocers, timber merchants, jewellers and tailors
- Financial and insurance activities (11%) eg banks, investors, insurance brokers
- Professional, scientific and technical activities (7%) eg engineers and solicitors mainly

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Sheet 2.

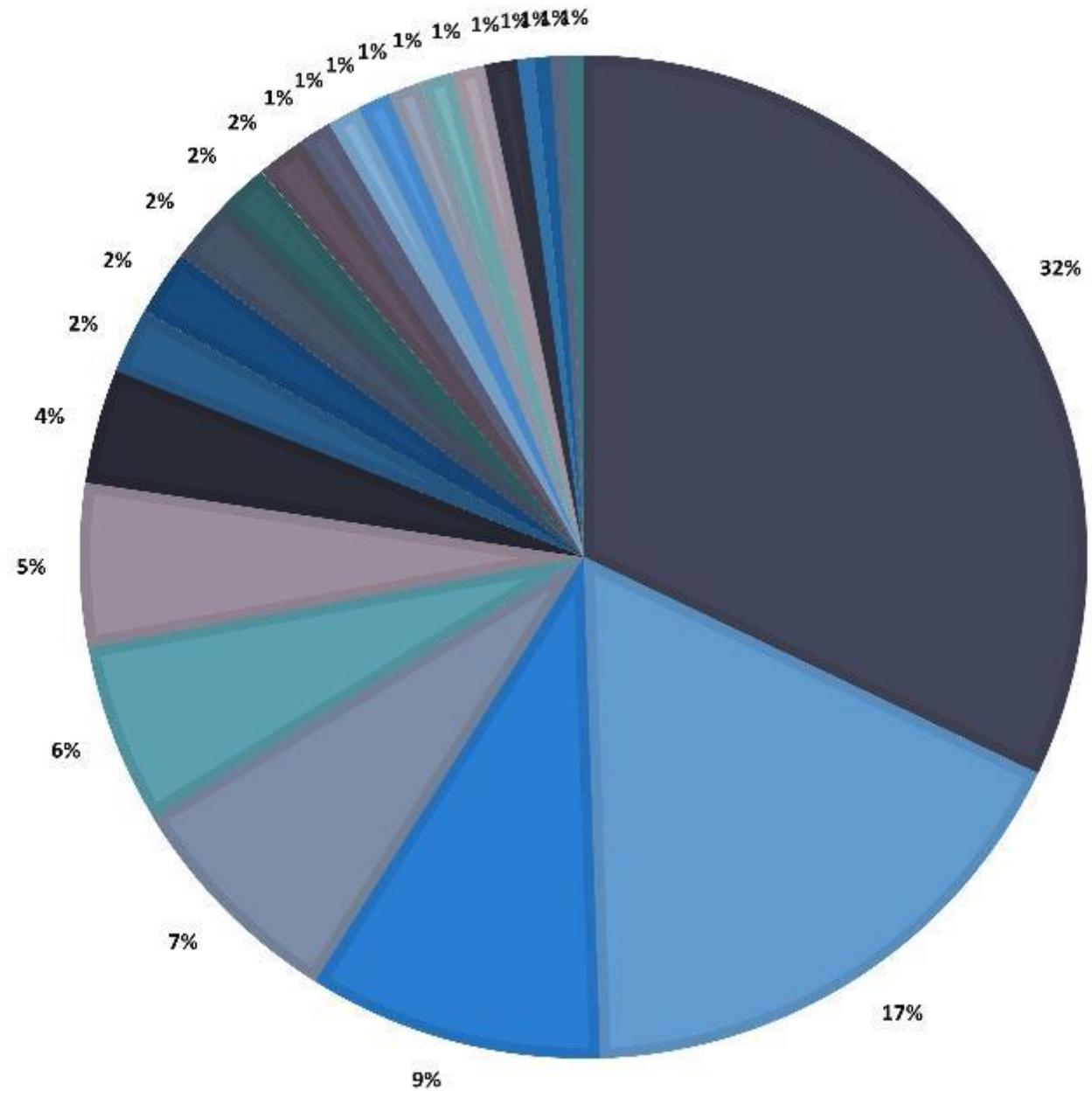


Surveys by Business Sector (SIC)



- C - Manufacturing
- S - Other service activities
- K - Finance & insurance
- G - Wholesale & retail
- M - Professional, scientific & technical
- A - Agriculture, forestry & fishing
- J - Information & comms
- R - Arts, entertainment & recreation
- F - Construction
- H - Transportation & storage
- B - Mining & quarrying
- P - Education
- I - Accommodation & food
- L - Real estate
- N - Admin & support
- Q - Human health & social work
- E - Water supply, etc
- O - Public admin & defence

BREAKDOWN OF MANUFACTURING TYPES



- 11 - Beverages
- 13 - Textiles
- 28 - Machinery and equipment
- 10 - Food products
- 24 - Basic metals
- 30 - Other transport
- 32 - Other
- 14 - Clothing
- 17 - Paper
- 20 - Chemical manufacturing
- 18 - Printed material manufacturing
- 15 - Leather
- 29 - Motor vehicles
- 23 - Other non-metallic mineral products
- 21 - Pharmaceutical manufacturing
- 31 - Furniture
- 16 - Wood
- 25 - Metal products manufacturing
- 22 - Rubber and plastic products
- 20 - Chemicals and chemical products
- 25 - Fabricated metal products, except machinery and equipment
- 29 - Vehicle manufacturers
- 27 - Electrical equipment manufacturing

Review of the Impact of Covid

Extended government support did much to mitigate the expected economic impact of Covid and the volume of records at risk situations we anticipated did not occur.

However, some sectors clearly were impacted - eg arts, entertainment and recreation so a pilot project was devised to reach out to a small part of this sector. Under this pilot 15 independently owned cinemas were contacted but only one response was received and no surveys agreed.

If not covid other risks to businesses and their records are ever present – cost of living, Brexit impact, rising energy bills.

Phase 2: Surveys

Ongoing covid-19 restrictions meant active surveying took longer to get started. But to date we have surveyed over 20 businesses (c.300lm of records) with dates agreed for more. Including:

- Goodfellow and Steven, (Bakers, Broughty Ferry) est.1897
- Scottish Youth Theatre (Glasgow) est.1976
- Peter Greig & Co (Linen manufacturers, Kirkcaldy) est.1825
- R & W Scott (Jam makers, Carluke) est.1873
- John Gordon & Son (Sawmill & Timber Merchants, Nairn) est.1862
- Scotland's Garden Scheme (Charity, Edinburgh) est.1931
- Dunblane Bowling Club (Bowls Club, Dunblane) est.1820

Have identified 214 potential new businesses (date range: 1774 – 2000s) to survey and contacted c.66% of these so far.

Future Surveys

What are our priorities for surveying?

- Old or significant businesses
- Historically underrepresented sectors
- Diversity and Inclusion (eg ethnic minority/female owned)
- Emerging sectors – net zero, biggest employers, new technology
- Sectors most at risk (COVID/Brexit/Cost of Living)

QUEEN MARY II

GLASGOW

Surveying the Surveys

What makes a good survey?

- Locations! Eg much easier to find the records listed as being in the red cupboard or lower strongroom
- Detail – we might not get back in to list again so work quickly and thoroughly
- Names – who is our current company contact and their role plus who has done the survey
- Basic admin history – what does the business actually do?
- Photographs – especially useful when running out of time and for future before/after shots
- Signage – leave something physically to say the records have been surveyed and contact details

Phase 3: Lessons Learned & Questions

- Be realistic about what success will look like? We contacted 260 businesses for re-surveys and had responses from c.25 or 10%
- A second focused contact of 26 business resulted in 20% response rate but was much more time-consuming
- What is the end goal? Not necessarily deposit with a repository but raising awareness within businesses of the value of their records
- Can we adapt our workflow to carry out this sort of review and audit activity more regularly?
- Recognise the limitations of the surveying officer role – need to share our knowledge to build capacity in the sector for surveying

Capacity building and adapting working practices

How has FIELDWORK helped?

- Knowledge is power – we know where we've come from and essential role of surveying
- Informed future surveying officer work priorities
 - Partnership working is a key tool
 - Digital means we have to engage quickly or even before risks occur
 - More relationship building between business and archives – this is a long-game

Next steps:

- Share our toolkit and report with sector
- Revive thematic surveying and develop partnerships to tackle some of our priorities

Resources

Our FIELDWORK toolkit and resources are being published at <http://ballasttrust.org.uk/FIELDWORK/>

They include:

- Surveying contact template
- Surveying kitlist
- Signage text

The ARCW Records at Risk project in Wales also has excellent resources at <https://archives.wales/records-at-risk/>



Contact me or find out more

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www.ballasttrust.org.uk | @ballasttrust

www.surveyingofficer.co.uk