Improving Access to the Records of Landed Estates: Balancing Archival and User Perspectives[1]

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RÉSUMÉ Cet article est fondé sur les résultats d'une recherche doctorale qui a examiné et évalué les méthodologies de catalogage archivistique anciennes et courantes appliquées aux documents relatifs aux propriétés foncières de longue date en Grande-Bretagne, du point de vue des utilisateurs de ces documents d'archives. Il rapporte les conclusions de panels qui ont exploré l'opinion des utilisateurs par rapport à un échantillonnage d'instruments de recherche papier et numériques de divers niveaux de description et de divers degrés d'élaboration. Les résultats reflètent des points de vue des utilisateurs qui sont importants à la pratique professionnelle courante. Ils se situent entre une forte dépendance sur l'aide offerte par les archivistes et un manque de sensibilisation ou une utilisation peu fréquente des instruments de recherche numériques en ligne et du matériel connexe clés. Un constat tout aussi important est le désir des utilisateurs de pouvoir accéder aussi bien aux instruments de recherche papier qu'à ceux disponibles en format numérique, pour fins de recherche. Ils ont apporté des arguments convaincants pour la rétention des deux formats alors que les efforts professionnels se sont surtout concentrés sur la distribution en ligne.

ABSTRACT This paper draws on the findings of doctoral research that surveyed and evaluated from the perspective of the user past and current archival cataloguing methodologies for the records of long-lasting landed estates in the UK. It reports on the findings of focus groups that explored users' opinions of a sample set of descriptive paper and electronic finding aids of various depths and levels. The results reflect user views that are important to current professional practice. These range from heavy reliance on assistance from archivists to lack of awareness or very limited use of key online archival finding aids and related resources. Just as important was the strong desire for access to paper finding aids as well as electronic ones for research purposes. Convincing arguments were made for retaining both formats at a time when professional efforts have focused more on online delivery.

Introduction

A substantial amount of land in the UK was, and to a more limited extent still is, in the hands of the owners of landed estates, including the Oxbridge colleges and the Church of England. Much of this land was held and managed by individuals, families, or institutions from medieval times to the nineteenth and twentieth centuries, some reflecting feudal tenure and manorial administration that followed the Norman Conquest in 1066 and persisted to the seventeenth and twentieth centuries, respectively. It follows that the majority of people in the UK lived and worked on such estates in the past. The records generated by these estates are characterized by their extensive nature, geographical spread, diverse content, and long chronological span, and frequently include material dating from the twelfth and thirteenth centuries right up to modern times; some estates have records from as far back as Saxon times.[2] The resulting archive collections, which were accumulated during the course of each estate's existence, document the ownership and transfer of land, the working of the estate, and tenancy and customary rights. They provide insights into the lives of the tenants and workforce as well as information about wider activities, such as political, commercial, or industrial developments.

The records generated by and in connection with these landed estates have an inherent historical, archival, and general informational value to a wide range of users, which cannot be overestimated. Not only are they invaluable "to the social, economic, political, administrative and cultural historian alike," forming "a prominent part of the nation's archival heritage,"[3] but they also reflect all levels of society within the community, in addition to the people from the "big house." Nowadays, they have acquired new uses as sources of evidence for landscape change, land use, rights-of-way, mining rights, watercourses and flood risk. A flavour of the scale, richness, and diversity of these archival resources can be obtained by browsing the online indexes for the UK's National Register of Archives (NRA),[4] which was established in 1945 to provide a central resource for information on the nature and location of manuscripts and records of historical importance that are held in public and private hands. The NRA also reveals another common characteristic of estate archives: they are often dispersed among several locations, reflecting their origins as evidence of title to land and property and of the activities, interests, and family links of the land owners. The records of one estate may therefore be found in archive

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2   Frederick G. Emmison, *Introduction to Archives* (London, 1978), 8.
3   Royal Commission on Historical Manuscripts (HMC), *Principal Family and Estate Collections. Family Names L–W.* Guides to Sources for British History Based on the National Register of Archives, vol. 11 (London, 1999), ix.
4   The National Archives (TNA), National Register of Archives (NRA), http://www .nationalarchives.gov.uk/nra/default.asp (accessed 1 December 2012).

repositories on opposite sides of the country, or even abroad if the records have been sold.

Despite their undoubted research potential, these records are underused for a variety of reasons, including their overwhelming bulk, their poor condition, reading and interpretation difficulties, or simply because many collections remain uncatalogued.[5] A key solution to promoting and facilitating wider use undoubtedly lies in the production of effective finding aids, but this is not a straightforward issue. Many finding aids in UK repositories predate *ISAD(G)*[6] and vary in format. Moreover, limited resources dictate that priority is given to dealing with uncatalogued material, so it is unlikely that existing finding aids will be recreated from first principles. Instead, many repositories have worked on "retroconversion" of finding aids, adapting to the requirements of *ISAD(G)* as much as possible. In the case of the Cefnbryntalch catalogue,[7] for example, additional information has been included, such as a brief indication of the type of records held, covering dates and references to other finding aids.

The research summarized in this paper aimed to investigate the extent to which existing archival finding aids that relate to estate records in the UK meet user needs. In order to achieve this goal, the following specific objectives were set:

- to review the nature and content of estate archives, and the methods and approaches that have been used for cataloguing these records;
- to survey and evaluate from the viewpoint of the user the methodologies used to construct archival finding aids;
- to gather a representative sample, in terms of breadth and depth, of existing finding aids for a specific estate archive, constructing additional examples when necessary;
- to convene a number of focus groups comprising current and potential users of archives to explore views on finding aids in general, using the representative sample to generate discussion.

This article describes the sample of finding aids and reports on the findings of the focus groups.

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5   Christopher Kitching's *Survey of Archive Cataloguing Problems (England and Wales)* (London, 2002) was one attempt to assess the scale of the backlog and helped to make the case for subsequent surveys and funding to address the problem. Estate collections are featured in a number of cataloguing projects, including the Croome Collection project, which comprises the archives of the Earls of Coventry, held by Worcestershire Record Office. See http://www.worcestershire.gov.uk/cms/records/projects/croome-collection.aspx (accessed 1 December 2012).
6   *ISAD(G): General International Standard Archival Description*, 2nd ed. (Ottawa, 2000).
7   National Library of Wales (NLW), ISYS:web, http://isys.llgc.org.uk/ (accessed 1 December 2012); select "Archives and Manuscripts" and search for "Cefnbryntalch."

Literature Review

The literature review for the thesis considered the two principal foci of the study: the major works relating to archival description over the twentieth century and user needs. Full details were included in the thesis but do not require repetition here as they are accessible in the professional literature.

In contrast, little has been written exclusively about estate archives for the benefit of archivists. An article in the *Journal of the Society of Archivists (JSA)* in 1992 offered guidance on the arrangement of estate records.[8] It was closely followed by a paper by Michael Cook to align the aforementioned guidance with *MAD2*.[9] As long ago as 1934, at a meeting of the Records Preservation Section of the British Records Association, the national librarian of Wales shared his ideas for developing a uniform system for cataloguing title deeds.[10] In more recent times, two articles published in the *JSA* in 1995 were based on an extended paper by Kevin Ward, which was concerned with the treatment of pre-registration title deeds.[11] In the Society of Archivists' *Diploma Training Manual* (1996), a complete module was devoted to exploring "the nature, history and overall arrangement and uses of estate records"[12] and to demonstrating the perceived importance of these records within the profession. Similarly, the summary of the contents of 120 of the UK's major estate archives in the Historical Manuscripts Commission's (HMC) guide to *Principal Family and Estate Collections* (1996 and 1999) revealed "the richness of this part of the nation's heritage"[13] as well as the location of the collections. Perhaps one of the most useful publications on this subject and on the types of records to be found among estate records is the *Guide to the Retention of Modern Records*

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8   Philippa White, Ruth Bagley, Elizabeth Cory, Malcolm Underwood, and Gareth H. Williams, "The Arrangement of Estate Records," *Journal of the Society of Archivists* 13, no. 1 (1992): 1–8.

9   Michael Cook, "The Arrangement of Estate Archives: A Commentary in the Light of the *MAD2* Description Standard," *Journal of the Society of Archivists* 14, no. 2 (1993): 117–24.

10 Sir William Ll. Davies, *The Cataloguing of Deeds and the Possibility of a Uniform System* (Aberystwyth, 1934).

11 Kevin T. Ward, *Ownership, Custody and Abandonment of Pre-registration Title Deeds. An Analysis for the Use of Lawyers, Archivists and Others* (Bedford, UK, 1995); Kevin T. Ward, "Pre-registration Title Deeds. Part 1: The Legal Issues of Ownership, Custody and Abandonment," *Journal of the Society of Archivists* 16, no. 1 (1995): 27–39; Kevin T. Ward, "Pre-registration Title Deeds. Part 2: Guidelines for Appraisal as Developed in the Bedfordshire Record Office," *Journal of the Society of Archivists* 16, no. 2 (1995): 153–65.

12 Society of Archivists' Diploma Course Committee, *British Archival Practice: The Society's Archive Diploma Training Manual* (London, 1996), G.0.1.

13 Royal Commission on Historical Manuscripts [hereafter HMC], *Principal Family and Estate Collections. Family Names A–K*. Guides to Sources for British History Based on the National Register of Archives, vol. 10 (London, 1996); HMC, *Principal Family and Estate Collections. Family Names L–W*, iii.

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on Landed Estates, first published in 1992[14] but fully revised in 2007.[15] As well as offering guidance on applicable legislation and retention periods relating to records currently generated by landed estates, this book highlights the variety and chronological span of these records, with a chapter devoted to historic records that may date back to medieval times. A recent paper in the *JSA* explored the ways in which family papers (which often form part of estate collections) have been treated in select UK specialist repositories.[16]

Many trainee archivists and researchers working with estate records will have encountered books or training courses offering advice on how to read and extract key information from the main types of records found within estate archives, such as title deeds.[17] In addition, the advent of the World Wide Web has enabled guidance to be published online.[18]

Methodology

A multi-method approach was adopted for studying users' perceptions of the usefulness, or otherwise, of finding aids for estate collections. A literature search and review established the existing knowledge base in this area and positioned

14 Peter H. McKay, *A Guide to the Retention of Modern Records on Landed Estates* (Letchworth, UK, 1992).
15 Elizabeth Lomas, *A Guide to the Retention of Modern Records on Landed Estates,* 2nd rev. ed. (Letchworth, UK, 2007).
16 Elizabeth Wells, "The Arrangement and Description of Family Papers," *Journal of the Society of Archivists* 33, no. 2 (2012): 167–84.
17 See, for example, Nat Alcock, *Old Title Deeds: A Guide for Local and Family Historians,* 2nd ed. (Chichester, UK, 2001); Julian Cornwall, *An Introduction to Reading Old Title Deeds,* 2nd ed. (Birmingham, UK, 1997); and A.A. Dibben, *Title Deeds 13th–19th Centuries* (London, 1968; repr. 1990). The British Records Association ran a training day entitled "This Indenture 2: Understanding Title Deeds" on 30 October 2003 at the University of Birmingham. A more recent example is a short course held 6–7 October 2012 called "Understanding Title Deeds," run by Oxford University's Department for Continuing Education.
18 For example, the British Records Association has published several leaflets about the care of records and more specifically about title deeds, which are available at http://www .britishrecordsassociation.org.uk/pages/publications.htm (accessed 1 December 2012). Nottingham University's Manuscripts and Special Collections web pages contain useful research guidance at http://www.nottingham.ac.uk/manuscriptsandspecialcollections /researchguidance/introduction.aspx (accessed 1 December 2012), which includes advice about Deeds, Maps and Plans, Reading Medieval Documents, as well as Dating Documents. The Bedfordshire and Luton Archives and Records Service web pages offer information and advice about family and estate papers, including title deeds, reflecting the strength of holdings of this type of material by this archive repository. An introductory guide to title deeds and guidance about how to interpret these documents can be found at http://www.bedfordshire.gov.uk/CommunityAndLiving/ArchivesAndRecordOffice /GuidesToCollections/TitleDeeds.aspx and at http://www.bedfordshire.gov.uk /CommunityAndLiving/ArchivesAndRecordOffice/GuidesToCollections/ HowToInterpretDeeds.aspx respectively (both accessed 1 December 2012).

the study. The next step was to establish what kind of finding aids were available in UK repositories for these particular collections and to identify the types of people who were likely to use them. This required a survey; a questionnaire was sent to custodians of 200 repositories with rich holdings of estate records[19] and was followed by a series of forty-nine interviews to gather in-depth information. The researcher also visited seventeen institutions to survey the finding aids in person and to interview the cataloguers. Information gleaned from the survey guided subsequent decisions on the types of finding aids to be gathered or specifically compiled as samples for focus group discussions. Data derived from the survey also enabled the researcher to identify particular groups of users likely to consult estate material.

In order to stimulate discussions about the merits and demerits of various types of finding aids, a range of examples, compiled at different times and representing different levels and formats commonly available to current users of estate collections, were gathered for use in the focus group sessions. For comparative purposes, it was decided that all the finding aid examples should, as far as possible, apply to one estate collection. The collection was carefully selected from the many held by the National Library of Wales (NLW) as a representative example in terms of content and chronological span. The chosen collection related to the Cefnbryntalch estate in Mid Wales,[20] which comprises over 600 items dating between 1535 and 1910. These include manuscript material, such as volumes, deeds, documents, and correspondence, as well as printed material, including books, Acts of Parliament, reports, newspapers, maps, posters, broadsides, and sale catalogues. Although small in comparison with many other estate collections at NLW, Cefnbryntalch contains a remarkable range of rich and diverse material likely to be of interest to a wide variety of researchers, including agrarian, economic, family, local, political, and social historians.

The initial focus group session was concerned with the usefulness of finding aids generally, followed by a consideration of the sample finding aids. Table 1 offers information about the representative finding aids for the focus group participants, including the name, date of creation, scope and nature, elements included, and format. It also indicates where these finding aids, or those on which they are based, can be found.

19   The questionnaire resulted in 121 replies (60.5%).
20   The Cefnbryntalch estate was centred on the parish of Llandyssil, in the historic county of Montgomeryshire, now Powys, Wales, UK.

Three examples of "guides" were included for comparative purposes (references A, B, and C). A "box list" (E) was specially created by the researcher, although, of course, any collection that had already been catalogued did not need this kind of list. A "summary list" (D) for Cefnbryntalch was drawn from NLW's *Annual Report*, which publishes such summaries shortly after a collection has been received at NLW; this particular finding aid would have been written soon after the Cefnbryntalch collection was deposited in 1938. The collection-level description (F) is an example from a series compiled during a joint project between NLW and HMC, May 2001–April 2002, to establish a format for such descriptions in preparation for building Archives Network Wales (ANW).[21] This particular example was based on descriptions in the existing catalogue of the collection, rather than using the records themselves; this is reflected in the depth and accuracy of the description given. Finally, three examples of catalogues, representing styles used at different times, were gathered together. The traditional catalogue was the actual Cefnbryntalch "Deeds and Documents" catalogue (G), compiled according to the NLW "old style" by staff in NLW's former Department of Manuscripts and Records.[22] This was supplemented by copies of card index entries for Cefnbryntalch's non-manuscript material (H), which was catalogued by staff in NLW's former Department of Printed Books and Department of Maps and Prints. Another catalogue constructed by the researcher was styled the "integrated" catalogue (I); this included features found in some pre-*ISAD(G)* estate catalogues, such as a contents page and an introduction, as well as indexes for names, places, subjects, and occupations. In addition, the body of the catalogue contained a section for each type of record (e.g., title deeds, accounts, rentals, posters), after which each record within the section was listed chronologically, except for title deeds, which were listed chronologically by parish. Owing to time constraints, it was not possible to construct a modern *ISAD(G)*-compliant catalogue for the Cefnbryntalch collection, so, for the purpose of the focus group research, a catalogue created at NLW in 2002 for a similar estate (the Garn Estate) was used (J). This is primarily an electronic finding aid accessible via the Internet, although a printout is available for search room use if required.

21 ANW, now called Archives Wales, provides online catalogues at collection level for archives held throughout Wales: http://www.archiveswales.org.uk/ (accessed 1 December 2012).

22 Old-style catalogues have no introductory information about the collection or its provenance, nor indexes. The cataloguer picked out a document at random from a box, gave it a number and wrote a description on a slip bearing the same number before moving on to the next document. Once all documents had been dealt with in this manner, they were arranged chronologically, so the document numbers in the catalogue do not run sequentially.

Table 1: Sample Finding Aids for Focus Group Participants

Finding Aid	Reference	Date Written/Published	Scope and Nature of Finding Aid	Elements Included[23]	Format in Focus Groups
NRA guide[24]	A	n.d.	Outline guide to collection contents	Types of documents, covering dates	Paper and electronic
NLW guide[25]	B	1996	Outline guide to collection	Types of documents, covering dates	Paper and electronic
Guide in style of Bedfordshire and Luton Archives Service[26]	C	Compiled by researcher in 2006	Outline guide to collection contents	Types of documents, locations	Paper
Summary list (NLW *Annual Report*)[27]	D	1937–38	Summary of collection contents	Descriptive outline of contents with overall covering dates	Paper and electronic
Box list (based on NLW box list compiled in 1981)[28]	E	Compiled by researcher in 2006	Basic list of the contents of each box within the collection and of printed and graphical material transferred to other NLW departments	Indicative list of principal documents with overall covering dates for each box	Paper
Collection-level description[29] (*ISAD(G)*-compliant)	F	2002	Description of context and content of deeds, documents, etc. in collection	Administrative history and biographical details, scope and contents of collection, etc.	Paper and electronic
Traditional catalogue (NLW old-style schedule)[30]	G	1962	Itemized description of deeds, documents, etc. arranged in chronological order	Description of individual items with dates	Paper and electronic

Traditional catalogue (NLW card catalogues)[31]	H	n.d.	Descriptive notes of maps, books, posters, ephemeral material (one card per item)	Description of individual items with dates	Paper
"Integrated catalogue"	I	Compiled by researcher in 2006, based on pre-ISAD(G) archival principles – a compromise between G/H and J	Introduction to collection followed by description of individual items in the collection, arranged by record types	Administrative history and biographical details, followed by itemized descriptions with dates	Paper and electronic
Modern ISAD(G) catalogue (GARN)[32]	J	2002	File-level, descriptions of "bundles" of records rather than itemized descriptions	Administrative history and biographical details; records grouped and listed according to ISAD(G)	Paper and electronic

23 As already indicated, most of these finding aids predate ISAD(G), so they are not described using ISAD(G) terms to avoid potential misunderstanding. The purpose of this research is to gather users' views of finding aids commonly encountered in UK archives rather than assess the extent of compliance with ISAD(G).

24 TNA, NRA: Cefnbryntalch Estate, http://www.nationalarchives.gov.uk/nra/searches/subjectView.asp?ID=O9541 (accessed 1 December 2012).

25 NLW, Guide to the Department of Manuscripts and Records (Aberystwyth, 1996), 65.

26 Bedfordshire and Luton Archives and Records Service, Guide to Family and Estate Papers, http://www.bedfordshire.gov.uk/CommunityAndLiving/ArchivesAndRecordOffice/GuidesToCollections/FamilyEstatePapers.aspx (accessed 1 December 2012).

27 NLW, ISYS:web, http://isys.llgc.org.uk/ (accessed 1 December 2012); select "Archives and Manuscripts: Annual Reports" and search for "Cefn-Bryntalch."

28 Ibid.; select "Archives and Manuscripts" and search for "Cecil E Vaughan Owen."

29 Archives Wales, NLW: Cefnbryntalch Estate Records, http://www.archiveswales.org.uk/anw/get_collection.php?coll_id=20313&inst_id=1&term=Cefnbryntalch (accessed 1 December 2012).

30 NLW, ISYS:web, http://isys.llgc.org.uk/ (accessed 1 December 2012); select "Archives and Manuscripts" and search for "Cefnbryntalch."

31 Copies of entries relating to the Cefnbryntalch Estate, extracted from various card catalogues for maps, posters, and broadsheets etc., are available in the South Reading Room of NLW.

32 NLW, Full Catalogue, http://cat.llgc.org.uk/cgi-bin/gw/chameleon?lng=en (accessed 1 December 2012); search for "Garn Estate Records 1572–1943."

Focus groups

Five focus group sessions (including an initial pilot session) were held between November 2006 and February 2007. The purpose of the focus group sessions was to enable users and potential users of estate collections, and archives generally, to discuss their experiences of using archival finding aids and, if appropriate, to suggest ways in which they could be made more useful. Volunteers were drawn from user groups that were identified in the survey of archive services as having particularly "strong" holdings of estate collections. A mix of methods was employed to recruit people for the five focus groups: purposive sampling, a direct appeal for volunteers from the target groups (local and family historians, students), and a snowballing approach whereby people who had already been recruited or who were interested in the project suggested other potential recruits for this exercise.

Thirty individuals were recruited. Two were limited by physical disability and geographical distance and were therefore unable to be present at any focus group session; both participated through correspondence for the first part of the focus group, which discussed finding aids in general, but they were unable to participate in the second part, which involved the sample finding aids.

All thirty volunteers signed a consent form and completed a short screening questionnaire prior to the focus group discussions;[33] this was designed to provide a profile of participants.[34] The thirteen female and seventeen male participants represented all adult age groups: six were in their 20s, two in their 30s and 40s respectively, four in their 50s, nine in their 60s, and seven were 70 and over. They included family historians, students, local historians, academics, archivists, and record agents.[35] Twenty-one participants visited an archive service on a monthly or more frequent basis, six visited yearly or at variable intervals, and three gave no response to this question. Only one person had not visited any archive repository; the other twenty-nine had visited a national repository. Half were (or had been) based in Aberystwyth, home to two national repositories, the county record office, and the university's archives,[36] or were members of the Powys Family History Society. Twenty-six had used local archive repositories, fourteen had been to specialist repositories, and seven stated

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33 The two who were unable to attend focus group sessions sent replies to the first seven questions posed to focus group participants.
34 A copy of the questionnaire can be found in Appendix 1.
35 A person who carries out paid research on behalf of others.
36 These repositories are, respectively, the National Library of Wales, which also hosts the National Screen and Sound Archive of Wales, the Royal Commission on the Ancient and Historical Monuments of Wales, which maintains the National Monuments Record, the Ceredigion Archives, and the Aberystwyth University Archives. For website details, see TNA, *ARCHON Directory*, http://www.nationalarchives.gov.uk/archon/default.htm (accessed 1 December 2012).

that they had visited "other" repositories.[37] Four who were trained archivists or librarians claimed to be "experts" at using archival finding aids within an archive repository. Eighteen considered themselves to be experienced users, while six family historians and one student stated that they were inexperienced, and one postgraduate student had no experience at all. No participants considered themselves to be "experts" at using online finding aids, but half claimed to be "experienced," seven[38] were "inexperienced," five[39] had no experience or were unsure how to start, and the remaining three[40] gave no response. The seven[41] who claimed to be inexperienced ranged in age from their 20s to over 70, whereas the five[42] who lacked any experience at all were in their 60s and 70s. Apart from one family historian who did not answer this question, twenty-one out of the remaining twenty-nine volunteers had used online resources for family and local history research.[43] It was disappointing that only one person cited the NRA and nobody mentioned the online ARCHON Directory of archival repositories in the UK, although three referred to archive networks and two had used online catalogues. At least thirteen had used the websites of particular archive repositories.

A topic guide was followed in all sessions except the pilot, in order to produce a measure of comparability across groups. The specific questions and their sequence in the topic guide are reflected in the section on findings, below. The first part of the sessions (which include responses from all thirty volunteers), focused on the participants' experience and perception of finding aids. During the second part (which did not include the views of the two correspondents who were unable to attend in person), participants were invited to evaluate the range of specific finding aids described in Table 1, for the purpose of stimulating discussion and comparative comment. All sessions were audio recorded. After each event, the tape was transcribed and the results analyzed with the help of NVivo software. To ensure anonymity, each participant was assigned a unique alphanumeric identifier: the letter indicated the user category and the number identified each individual within that category.

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37   These included archives abroad, regimental archives, newspaper archives, the local family history society's library, cathedral archives, as well as private archives and libraries.
38   Five pursuing family history, one academic, and one student.
39   Four family historians and one postgraduate student.
40   A librarian, a family historian, and a postgraduate student.
41   One in his 20s, one in her 50s, three in their 60s, and two over 70.
42   Two in their 60s and three in their 70s.
43   Web resources listed by more than one participant included Ancestry.com; census; NLW; Genuki; Free BMD; LDS Family Search site (IGI, 1881 census); TNA; the archive networks Access to Archives (A2A), Archives Network Wales (ANW), and Scottish Archive Network (SCAN); British Library (BL); online archive catalogues; BBC family history web pages; the search engine Google; Find My Past; local history society pages; 1837online.com [now www.findmypast.co.uk].

Table 2: Alphanumeric Codes for Study Participants

Letter	User Category	Number
A	Academics (lecturers, postgraduate history students)	6
I	Information professionals (trainees, qualified and retired archivists and librarians)	10
L	Leisure historians (researching family and local history)	12
R	Record agents	2

Findings

Experience of using estate archives

The participants were first asked to describe their experience of using archives and, in particular, estate collections. Most of the information professionals used archives as part of their work, but many had also used them for their own research. One archivist, who also carried out records agency work, stated, "I have catalogued estate archives myself, so the experience is not only as a user but as an archivist" (I5). Some felt that estate collections were not fully exploited, although some types of records appeared to be more useful than others:

I don't recall coming across that many estate records in having to help people, mainly genealogical and stuff. But one thing we did use quite often were estate maps, house history, or just general local geography and just looking around the maps. You'd go back as far as you could and start looking at whatever maps were available and often it was estate maps that were available after a certain time. So that's all really that was. There was a card index for the maps, so I suppose you go through to the estate records, the estate maps in particular, through that index, not necessarily through a catalogue for that particular estate (I8).

One of the most obvious uses for estate records is academic research. A participant who had used estate archives for postgraduate research alluded to the dispersed nature of some estate archives, while another person, who was using estate archives for doctoral research, pointed out how papers that have survived from some archives may have become separated over the years. Both referred to some of the types of records found within the estate archives they had studied. Two of the academics had used archives mostly for their own personal research. One had "used mostly online resources rather than card-based because that seems to be the way that things are developing, in terms of finding aids" (A2), whereas the other appeared to have used mainly paper-based finding aids for a large estate, which included material relating to a smaller estate in which he was interested:

I'm particularly interested in a group of farms that belonged to another, very minor estate, … For some reason, most of the papers have ended up in the Nannau Collection and my main concern is that very often the schedules are not sufficiently detailed. In other words, I wish there were more cross-references and so on to all the material relating to Blaenglyn. Hopefully with computerization and digitization, it could be done. It's very time-consuming and … sometimes very frustrating to try and extract them from the papers of this other major estate (A1).

One of the record agents stated that "basically, I want genealogical information" (R1) and outlined in order of priority the sources he used for genealogical research:

… parish registers first, some Nonconformist registers second, … censuses and probates. Now, for the most part, that's all I can reasonably do on a budget … but certainly with a lot of Welsh research, for instance, you will find a gaping great hole in the records. Pembrokeshire's a marvellous case in point. Parish registers are almost universally lousy, the Bishops' Transcripts begin in 1799, so in certain places you are forced to fill a gap, not necessarily a complete lack of records but just to fill a gap, and that is when I tend to use other sources such as deeds and the like (R1).

Frequently, he looked for the things that had been left out of the schedules:

That is, I'm not generally looking at the landowner, because they're reasonably well documented. What I'm usually looking for is tenants, farm names, field names, this sort of thing to try and link up with where there's a gap in my knowledge of the family. So, I'm coming at it from a completely different angle (R1).

One of the largest categories of archive users nowadays consists of people who carry out research into family, house, or local history in their leisure time. It was apparent that the group of participating leisure historians had a range of experience, with some acting as mentors or advisers to those just starting out. Some had used archives to pursue their family history and were aware of the existence of estate records and their potential for genealogical research, even if they had yet to use them, whereas others had encountered them almost by accident: "I've done a little bit of family history. I have looked at an estate while waiting for something else, but that's all I've done on the estate part of it …" (L11). Some put their inexperience down to lack of time to pursue their research interests in depth or feelings of confusion that had hampered their use of archives generally. In contrast, others had a lot of experience using archives in different repositories.

Finding archives

The second question asked participants how they had located the archives that they needed for their research. In all groups, there appeared to be two approaches: to ask the staff who worked in the archive or to ask other people, and to use finding aids and secondary sources to identify the records for themselves. One

of the main methods used by everyone was simply to ask an archivist, other members of staff, or anybody who might know. This appears to have been a commonplace practice, particularly among the older members of the focus groups. One person who carried out postgraduate research explained the situation as follows:

Well, I was told [by my supervisor], "Go up to the National Library, go and talk to ——," who was an archivist there, who I happened to know incidentally in any event. He was terrific, and I think this is quite typical of how libraries like that operated forty years ago. The knowledge of what was in the archive was in the archivist's head … he'd come up with boxes, we'd lift the lid of the box, and he'd have a look with me and if we found something that was likely to be of use … that would take half a day or a day or two days, and then he'd come up with another box, and say, "Try this," and that was how it was done (A3).

This search strategy works when there are staff who have the time and knowledge to answer users' queries, but increasingly staff time is at a premium. When information about the location of archives is increasingly available via the Internet, it is interesting that some people see a continuing need for staff to be on hand to guide them through the repository's finding aids. Different users asked for assistance from repository staff at different stages of their research. One person, carrying out academic research, sought help to verify whether the records she required were in fact at the archive repository, and another academic asked for help in mastering how the finding aid system worked before he began searching for items of interest.

It seems that archivists and paraprofessionals are not the only ones approached for information. One of the archive students had asked for help from the "people who actually use the service … there were many people there who'd been there a lot longer than I had, just as users … they were more than likely to know how to find certain things" (I9). Others have also been helped by people with similar interests, and there would appear to be an informal support network in operation in some areas.

Finding aids specifically named by participants for use at the start of the search process included guides and card indexes. One archivist elaborated on the types of finding aids she had used in county record offices in Wales: "Card indexes, paper finding aids, printed finding aids, handwritten finding aids, electronic finding aids, and so on, Archives Network Wales and the National Register of Archives, and in the National Library of Wales, I've used the ISYS:web catalogue" (I5).[44] Some users favoured the more traditional paper-based finding

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44   The pre-*ISAD(G)* descriptions of archives and manuscripts are found on ISYS:web, http://isys.llgc.org.uk/ (accessed 1 December 2012). They are not yet included in NLW's "Full Catalogue."

aids even though they were replicated or had been replaced by electronic versions. One who took this view said,

… a lot of my searching, where I'm using personal names, requires dealing with patronymics[45] … frankly it's easier to spot something using a printed schedule very often, flicking back and forth, than it is trying to do it electronically, even if you've got the same material up on the screen. Don't get this wrong – I'm not knocking electronic stuff because something that can seek out a single word, name, or phrase in a load of verbiage is very useful to me, but not always (R1).

He concluded by saying that he could

… see merit in printed volumes from a psychological point of view … because there's a certain reassurance in the printed or typescript word … The availability of something that's more reassuring ... like a bound volume is perhaps underestimated (R1).

It emerged during the course of these discussions that a small number of leisure historians, in their 60s or older, would not use computers. At a time when more information is becoming available online, this has serious implications and effectively disenfranchises one section of the community. One of the more vociferous members of this group stated, "Well, we don't use the Internet. You see, my house I've got full of books. We use the books" (L1). Interestingly, she continued by saying, "Well, I've heard of [Archive Network Wales],[46] but with no computer or likely to have, I won't be using it. I've heard about it and I understand they're wonderful all of these things, but there's more and more going on in the National Library … which I know would be useful saving journeys down to Mid Wales, but no" (L1).

Effectively, this user and others like her are denied access to many of the finding aids that emanate from the archive networking projects in order to provide an overview of archive collections and to help people to identify records likely to be of use. Some finding aids, like collection-level descriptions, have been designed primarily for online access. However, in a follow-up message after the focus group, one leisure historian wrote, "Our main thoughts are that the 'Internet' is the way ahead. It avoids travelling time, sometimes physically competing for resources and distractions like the shops and beach at Aberystwyth" (L7). Others also indicated that they make good use of the Internet. One academic stated,

45 In the traditional naming system in Wales, a person is given a name and links it usually to his/her father's name by adding *ap* ("son of") or *verch* ("daughter of").
46 Archives Network Wales is now called Archives Wales, http://www.archiveswales.org.uk/ (accessed 1 December 2012).

I generally start online. I generally start with the archive networks. I think that's because that's what I'm most comfortable with, both professionally and as a user. I've used A2A, I've used ANW, and I've also used general repository online catalogues as well, if they have them. I will usually follow that up with either a trip to the archive itself and a conversation with the archivist or possibly a phone call … But my first port of call is usually the online networks (A2).

Some have adapted their ways of searching for records over time. A retired archivist stated, "Now I'd probably type in the thing on the web, although I've got the web at home now, I don't use it all that much for research work … something crosses your mind and you say, 'I wonder where that is?' and then you'll look something up …" (I1).

For those based a long way from the records of interest, the development of online access, even on a pay-to-view basis, has obvious attractions. In recent years, there have been notable developments in the area of records of interest to family historians in particular. The benefits are self-evident, as stated by this participant: "I'm from Scotland, so I went to Scotland to look in the Genealogical Society's records run by the Glasgow Corporation. I had to go back there to look, which is a heck of a trek, but there is an online service called Scotland's People,[47] which I'm going to do a bit more of" (L8). However, one of the correspondents gave a more practical reason for her use of electronic finding aids. Originally, she had located archives "through traditional catalogues, printed lists, books, and articles, latterly as a disabled user. I rely on electronic aids – often I would prefer to use the 'old' finding aids, but books are often unwieldy and out of reach" (L12).

A rather different point emerged when more than one person commented on the usefulness of having finding aids in hard copy as well as in an electronic format. A record agent noted that it might be more productive to use paper finding aids for certain searches and gain the additional benefit of serendipitous findings, whereas in other cases electronic finding aids might yield results with the minimum of time and fuss:

I readily use the [catalogues that are] online, but dispensing with the [printed] schedules I think would be a major mistake because they're easier to use as regards browsing, especially if you're looking for place names, farm names of indeterminate spelling. You can spot something far quicker than you would electronically. You can flick back and forth as much [as you like]. I found using them for certain things much easier; otherwise I like to put a search term in and get out as much as I can, but there are times when you need to look at it from a different angle, I think. So I use whichever one happens to seem appropriate at the time (R1).

47　Scotland's People, http://www.scotlandspeople.gov.uk/ (accessed 1 December 2012).

Finally, although unscientific, others acted on hunches. In a conversation following the focus group, a retired archivist, who is still an active researcher, remarked, "[I worked] in archives here and I know them. And also, you see, I think you get inspiration, don't you? If you're experienced enough, you get a hunch – there must be stuff in this collection – and sometimes you're quite right" (I1).

Features and qualities of effective archival finding aids

The third question asked focus group participants to identify features and qualities that they considered useful in finding aids. One person expressed the following opinion:

The essential qualities of useful archival finding aids are basically clarity, use of a contents page and an index page, and in the case of estate records, an introduction with a family tree is very useful. It is also useful to have electronic indexes that you can use, but since I trained some time ago, I still find printed finding aids more familiar (I5).

User-friendliness was cited by a number of people: a well laid-out catalogue with an attractive, appropriately sized font, and clear sign-posts to subsequent sections is easier to use than one that is badly spaced, poorly typed, and disorganized. One participant noted that archive users have no choice in the finding aids they use, so they are forced to make the best they can of anything available.

Another essential quality identified by a trainee archivist was

… simplicity. If you're trying to find anything, you need things to be as clear-cut and simple as possible. It's not so much for the benefit for the archivist who catalogues the collection but for the person who gets round to looking at the thing. It's all very well describing title deeds in great detail, but how relevant is that for somebody who doesn't know what these documents mean? (I9).

In a similar vein, a uniform system of finding aids was also suggested by some since that would allow searchers to move from one to another, confident in the knowledge that they know how the system works and where they should look for particular information.

There was a certain amount of debate about how much information within finding aids was desirable. One person said, "The more detailed they [i.e., finding aids] are, the better. It gets you to the heart of what you're looking for that much more quickly" (A3). However, another said, "I don't like to have them too detailed because I'm primarily an online kind of searcher …" (I4). Judging how much detail to include in a finding aid can be critical. It is the factor that determines whether records are called up needlessly just in case they contain some useful information, thus threatening their preservation, or perhaps not used at

all because either the description is sufficiently detailed to meet the needs of most users or so vague as to render them totally inaccessible to readers unwilling to spend time ploughing through them. One record agent liked the ability to search electronic finding aids to locate specific records to answer his questions and also liked using paper-based finding aids to help him pick up other, more peripheral information that might be useful for his research.

Some people identified a need for finding aids to provide "… as much context about a particular record to see whether it's actually going to be worth your while calling it up or whatever" (I1). Several found cross-references valuable, whether they led to other parts of the catalogue or to related collections. One of the leisure historians made a plea for shorter and more user-friendly archive references, saying that they were "… usually indexed with a reference number which is usually some long string of numbers with backslash subsection, something like that. It should be a fairly easy thing to remember. You don't have to write down a row of numbers just to get to where you want to go" (L6). Perhaps this problem will become a thing of the past with more repositories adopting online systems that allow people to click on the item or production unit that they require and thereby order automatically.

Participants in different groups cited the usefulness of indexes, even though some believed that card indexes were becoming a thing of the past. Also, a number of people stated that they found guides extremely useful. The archive students favoured paper-based guides that could help them and searchers determine their next step. Some participants favoured talking to someone with experience and knowledge of the subject area who could offer them advice (and possibly reassurance) to further their research. One of the family historians declared,

I think probably the best aid is having staff at the resource centres that can point you in the right direction and who've got time to do that … I think an information person there who could point you in the right direction, I think that would be fantastic ... That would be my best help, I think (L9).

In more general terms, participants considered the following to be desirable in a finding aid: accuracy, clarity, consistency or the use of standard forms, being up-to-date, achieving a good balance between enough information and too much detail, and, finally, being able to find what you want. On the theme of consistency, one of the trainee archivists, recalling her work experience, stated,

… one collection in particular was huge and there were two big volumes of it, and I think it had been attempted to have been catalogued at three different times by three different people. There were little numbers added on to the references in some parts and not in other parts. It's a nightmare to try and navigate your way around it so, yes, consistency (I8).

Unfortunately, if the search room staff have difficulty finding their way through a catalogue, it does not bode well for inexperienced users, who may well be put off using archives for good!

One of the archivists commented on the usefulness to her of various types of finding aids:

… Archive Network Wales … I find quite useful … and of the examples [seen during the focus group session] I found that the ANW guide more useful than the NRA guide. Also, if archives haven't been catalogued at all, then such finding aids are very useful … but I found it a bit cursory. If the archive hasn't been catalogued at all, then an accession description such as the one done by the National Library [i.e. in the *Annual Report*] are very useful because at least you know such records exist and are in the repository (I5).

Again, a number of people mentioned the usefulness of indexes, while others remarked on the value of standardizing place names, particularly those in electronic finding aids. One of the academics stated that the decision about which level of description finding aids represent could be crucial for meeting user needs:

I think another issue with finding aids in practice as well is the level of detail that they go into, as well in terms of whether they're just a collection-level/fonds-level description or whether they go down to the detail of being individual item-level description of material, which are far more useful for researchers rather than just collection-level descriptions (A2).

A couple of experienced users identified the perpetual challenge facing archivists concerning how much information they should provide about each record – in other words, "… the conflict between the … method of making you look at the document and the need not to produce the document at all" (R1). A few people said it would be helpful to know the extent of catalogued material and the finding aids available online so that users could be satisfied that they had carried out a comprehensive search.

Catalogue formats/media

There was a broad consensus from all groups that finding aids should be provided in paper form and electronically via the Internet:

It's important to have a variety of forms because you have to realize the needs of the researchers themselves. Maybe some are computer illiterate, so they are unable to use online catalogues. Some may prefer just going through just paper catalogues, so it is important to have a variety of forms to cater for every need without discriminating any user (I6).

Although they acknowledged that finding aids should be available in both for-mats, some of the older participants were reluctant to use computers and harked back to the old days when all finding aids were in paper form:

It's a problem. I can see now the way the National Library's gone, such a lot is on com-puters or whatever, but it's off-putting for my husband and myself. It's a good job we started thirty years ago. So we hope not too much is going to go on in that, we hope we can still go and pick up a book and look at it, whatever it's called (L1).

Besides personal preference, one academic cited an additional advantage of using paper-based versions:

I can remember quite a few instances looking for something and then you see some-thing else that takes your mind, and if you've got a butterfly mind like a lot of us have, like I have, you're diverted into that, but sometimes it leads to a very interesting side de-velopment … that's nothing at all to do with what you originally were there for (A3).

However, not all people of the same age shared this view. Though they sup-ported the idea of providing archival finding aids in both formats, participants from different focus groups expressed a personal preference for the electronic format. As one stated,

Personally, I find it far quicker to use it on computer simply because of the search facili-ties. You can cut the time down, and certainly the times I have available to do research are very few and far between these days, so I want to be able to do it as quickly and ef-ficiently as possible, but I quite understand there are lots of people who just aren't used to using computers and would be far happier using a paper system (L9).

A perceived benefit of being able to undertake background searches online to locate records to order in advance was noted by a number of people and summed up as follows:

I think what's useful about having collections online, you don't have to be actually in the archive itself to search, whereas if you have a card index or schedules, you've got to be there to look through them and obviously you can't take them away with you at home, but say you want to do some research at home, you just go online and check up … (A4).

Another valued the ability to print out the results of searches of electronic finding aids, whereas the use of paper-based finding aids meant noting refer-ences and interesting leads by hand. There was a perception that the influence of technology on society as a whole would affect future finding aids:

… eventually, we won't be having them [finding aids] in any form apart from on the web, from the electronic versions, you know. That's the way central government wants to go, isn't it, really? But on the other hand … unless there is a retrospective transfer of

everything that is just available in card or whatever, former schedule lists, we will still need those, but I suspect that eventually, maybe in ten or fifteen years' time, we'll all be working electronically (A1).

This academic noted that the shift from paper to electronic finding aids affected not only the format of finding aids for archives but also the archives themselves:

And eventually of course, even estate records will only be available in electronic form. The few estates that are left, most of their records, I would think, are now kept electronically. If you think of agriculture, for example, highly automated by now. Records of everything, but only available in electronic form. There is no paper version to be had. So we'll have to get accustomed to it, I think (A1).

Finally, microfiche and microfilm constitute another format often found in archive repositories. For preservation purposes, popular records such as newspapers, indexes of wills, census returns, and parish registers have often been made available in these formats. The only references to these formats were negative: they were fiddly to use and had an adverse effect on the eyes.

The organization and arrangement of catalogues

Some participants were reluctant to voice an opinion on this question, because they did not feel they knew enough about it or simply had no preference. Those who did have an opinion favoured a number of methods. For example, several participants opted for original order:

If possible, follow the pattern that was established at the time the archive would have been built up, or whoever was keeping the records or whatever it is, because if you superimpose upon it your own pattern and value judgments, you are … adding value judgments that were popular in 2007 or in 1973 … (A3).

One of the record agents stated,

From my point of view, a chronological catalogue is best because I'm usually dealing with quite a short time frame … I would prefer a chronological schedule because I'm usually looking at a specific period … But generally speaking, unless the schedule is vast, I find a chronological one is more use for my purposes (R1).

However, a later comment suggested he did not favour a strictly chronological approach but preferred to have records sorted into different types first:

I don't particularly care for finding batches of letters in the midst of a string of documents. It's far better to have it broken down into sections like maps, letters … (R1).

An academic researcher also found useful an estate collection that had been divided into sections (or series) and then arranged chronologically:

From my own experiences, the estate collection I'm looking at is arranged chrono-logically. It's also subdivided into the families who owned the estates, and because I'm looking at one family in particular, I just turn straight to that section. I don't need to read through all the other sections then. This basically is chronologically organized (A4).

Other participants voiced concerns about a strictly chronological approach. As one of them said,

… the chronological is all well and good, but some people don't know or have no idea what sort of date they're looking at but they'll know it relates to a certain person or a certain area, so it's important to have both subject and chronological, I think, rather than just exclusively that, so again, it's just more detail the better really, I think, to make it easier using the stuff (I2).

Some information professionals found it difficult to reach a decision about how a catalogue should be organized. One archivist admitted,

Yes, I always find this really difficult. You get kind of caught up in a kind of archival way of doing things, don't you? Which is to look at it … the way it was originally kept by the people whose archive it is, but that's going to alter over time … (I3).

Users held differing views on whether it was preferable to have an integrated catalogue or discrete catalogues for different parts of a collection on the lines of the old NLW system, separated into deeds and documents, printed material, and maps and prints. Two of the leisure historians favoured an integrated ap-proach. As one of them explained,

There should be just one description of the whole thing. If you've had three different people describing the same thing in three different ways, how are you going to get a general idea of what's there? It would be much better if those three people got together behind the scenes to create a single catalogue (L5).

After seeing an example of a collection-level description, with the different sections concerning the content, context, and extent, another person could see advantages in creating two catalogues – one for users and the other for the custodians of the material:

A single catalogue has to be for a lot of different users, though. You'd have to range from … everybody from the user to the librarian. It might be easier to have separate catalogues, one for the user and one for the librarian who needs to know how much space the stuff takes up and stuff like that, and one just for the user who needs to know where to look for something or what the reference number is (L6).

Another person had no real objections to records appearing in different catalogues so long as there were clear cross-references to enable users to know the full extent of a collection. Perhaps the final comment on this theme should be as follows:

You're never going to get an ideal because you can guarantee that you'll get an inquiry where you're going to want to look at it by date and then it won't be by date, or you'll get an inquiry where you'll want to look at it by subject and it's going to be by date order. It's always one or the other, so I think what you said about putting it into subjects and then by dates within subjects, that's a good idea (I8).

Using electronic finding aids

This question revealed significant differences between some of the leisure historians and the rest of the participants. The information professionals, academics, and record agents were quite happy to use electronic finding aids. For all these people, the ability to access information in whatever form it exists is vital to carry out their work successfully. Increasingly, a grasp of, and a willingness to use, technology is important for researchers and information professionals. Six leisure historians and two academics did not and would not use computers, either because they were not confident about doing so or because they were concerned that if they did the computers would take over their lives.

One person admitted that she had avoided computers and the Internet simply because "… I'd be up all night because I know a lot about other people's [family history]. It wouldn't just be mine. I'd see something – hey, I know that family, oh, I know that family … If I'm looking through records, I get distracted … that's the trouble" (L1).

Also relevant in the context of this discussion is the fact that physical health can change over time and failing eyesight or dexterity may make using computers difficult. One of the correspondents, although confident about using electronic archival finding aids, commented: "At 86, I find looking at computerized catalogues very difficult [eyesight], painful [posture/hand and finger control]. It is also time-wasting compared with scanning a hard-copy catalogue. Only the young at heart enjoy the electronic formats!" (R2).

In summary, although the majority of the participants used computers, a significant minority did not and their views should be considered in any decision taken on the format of any archival finding aids. Also worth noting is the fact that some people avoided using new technology, not because they were apprehensive about acquiring and applying new skills, but because they perceived that continuing to use paper-based sources would be a more efficient and effective use of their research time.

Usefulness of specific types of archival finding aids

Focus group participants were given at least a quarter hour to browse a variety of finding aids. Paper copies of all finding aids were provided, together with access to electronic versions available online where appropriate. The only exception was the pilot session, during which a lack of Internet access and time constraints curtailed this activity.

NRA guide (A)[48]

A number of people had never heard of the NRA but thought they "would find it useful" (A5) because "it would be a starting point" (A6). Interestingly, one of the information professionals admitted that he didn't "know how the NRA works, to be honest – I never use it...." (I3). Some people liked the fact that the NRA guide was easy to use and noted that the inclusion of information about "the scope [of the collection] is important. It tells you precisely what dates it covers" (A1). Someone else stated,

It's quite useful as a pointer because a lot of people have heard of the National Register of Archives, or whatever, and they're quite happy to type in something and they're quite happy to know, oh yes, there is something, somewhere about my particular interest, and then it will tell you where to go. It's quite a nice little pointer (I7).

Another commented,

I understand that things like the [NRA] can't do a lot of information, it's just a starting point … This one does have a link [to the repository], but again, I think they could have had more information (I8).

However, not everyone was so positive:

I don't think it's a very good guide. I mean, if you were just looking at Cefnbryntalch Estate, you would find this, and that would be useful, but for instance, I noticed there was something about prisoners of war in the collection, and that's quite often cited as a research topic by researchers. Well, they wouldn't know there was anything about it in the collection, would they, by looking at this? Maybe that would be too detailed for this anyway (I5).

Perhaps some people were expecting too much information from this type of finding aid, which, in reality, serves only as a pointer toward more detailed information.

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48   The letter that follows each example of a finding aid can be cross-referenced to Table 1.

NLW guide (B)

The NLW guide drew similar criticism about its limitations, with remarks like "exceedingly limited" (A1), "I wouldn't use it" (L10), and "That one [i.e., the NLW guide] is so sketchy, I'm just wondering how much use it could be to anybody, just three lines" (I4). However, one participant remarked, "There's not much there, but then I don't suppose the intention was to give much" (I2). Some noted that the entry directed users to another finding aid. Though "short and sweet," it was considered useful because "it tells you the place exists…. At least you'd know there was something to go and look for…. it does point you immediately towards something else you could go and ask to see or something …" (I7).

Bedfordshire and Luton–style guide (C)

Responses to the guide based on that of the Bedfordshire and Luton Archives and Records Service were mixed. Some experienced participants took the view that "As a summary, that looks pretty good. If you want a general idea of what's in the collection, that's a pretty decent summary" (R1). A few people (I5, I6, I7) noted that it concentrated on places rather than names, one remarking that, "A lot of emphasis on places [is] included. Most of the page is covered with place names, so for those looking for a specified place, it's a good list" (I6). Also, some thought it was a more useful guide than the NLW example because "it gives you more detail of what is available…." (A6). However, others were not so convinced, commenting on the lack of dates, the fact that it did not indicate what kinds of records related to different places, and the absence of detail about family or personal names. In one person's words, "It's starting to flesh things out a bit … but it's still quite vague in detail" (A2).

Summary list (D)

At NLW, traditionally a summary list was compiled for each collection on deposit, purchase or loan, with the intention of providing researchers with information about the contents of that repository. Judging by the conversations in the focus groups, some people had come across these summary lists in NLW's *Annual Reports*, whereas others had never encountered them. When asked whether they would find this kind of finding aid useful, a few were very grudging in their appreciation, as illustrated by the following comments: "It doesn't go into a lot of detail …" (I2) and "In the absence of anything else …" (A1). Not everyone was convinced of the value to the general public, and an archivist commented, "It's more of an accession description than a catalogue, I think" (I5). A trainee archivist reiterated this view:

It's not something the general public might want to read. There's a lot of text in one block. There's a lot of information there, possibly too much in the sense because it's all in one block, you don't really know where to look, you have to scan through every single bit to pick out anything that might be particularly relevant to you and there's no … I couldn't get the sense of any order as to how it's laid out. It's not in date order, it's not in place order. Maybe it's in accession order, I don't know, but it doesn't tell you, I found anyway (I7).

A retired archivist remarked, "This particular one, anyway, is badly put together. They've thrown everything into it, but that was the first port of call. When something came in, it was described in the *Annual Reports*" (I1). However, he considered it "would be useful because there would be nothing else available" (I1). This was supported by another participant, who noted that this finding aid was essentially a product of its time:

In 1937–38, how many historians were active in this area in this general long period? A few dozen, perhaps? They would take the *National Library of Wales Journal*. The National Library of Wales in 1938 gets a bequest from Mrs. Buckley Jones and somebody spends an afternoon and a following morning and afternoon quickly going through it so that they can put a report in the thing, and the other historians, not many, a few dozen, who are interested will read this thing and they'll tick off that there and they'll say, we need to have another look at this, and that's about as much as you could do in those days, I guess. There's the staff coming in, the size of the staff you had at the time, without computers – come on, this is not great, but it's a long way better than nothing (A3).

Another member of focus group 3 noted the difference between the audience for whom the *Annual Reports* were written and the people likely to make use of the descriptions today:

… people doing family histories, saying "my ancestors came from such and such a parish" … can get something out of this, but those weren't the people reading this when it was published, this *Annual Report* description … You just can't predict what the use is going to be of a collection in fifty, one hundred, three hundred years, and the best way to get around that problem is to be as thorough as possible so that it can accommodate the different kinds of uses that might be made of it in the future (I4).

Another person could see potential value in the description, stating that the summary list was compiled

… way before computers, so they were thinking in a different way when they wrote this. One thing I liked about this is that it's full of names … and places and that's what a lot of people are going to be looking for (I4).

One of the archivists stated,

It's been superseded by the computer, hasn't it? But the *Annual Report* is almost the thing you'd expect to find in an introduction to a catalogue, isn't it? (I3).

Others could see potential in an electronic version of the summary list:

If, for instance, you were to search National Library *Annual Reports* online, you could turn up things you wanted from this, but using it in a bound volume, I'd be somewhat dubious. It's very hard to discern anything from that without going through every detail of it (R1).

It was also pointed out that

The *Annual Report* was created before they catalogued the collection, so for somebody who wanted to know something about Cefnbryntalch before they had the catalogue, if they wanted to see something very important and needed to see that before the catalogue was available, this was a good help … (I6).

Box list (E)

It was apparent that there were a number of people, particularly the more inexperienced, who had never encountered box lists. Views about the usefulness of this type of finding aid varied. One comment was:

Yes, they're useful. Some of the stuff I've used, they weren't even indexed, so you know, you basically get a box and then you have to go through it yourself … The people in the National Library haven't got time to do, I suppose, indexing of all their deposits, so having the box is the only way out. You need to know, to split it up into boxes if it is a big collection. It would be nice to know what's in each box so that you could just ask for that particular thing that you're interested in" (L5). One of the archivists remarked, "I think the box list works if you don't have a catalogue, but if you had a catalogue, I couldn't see any point of having a box list. Presumably box lists precede catalogues, or stands for a catalogue (I3).

On a more positive note, a trainee archivist had found box lists useful:

I've used box lists before, and they're quite a handy tool for working on a collection before cataloguing maybe. It's quite nice to know what you've got. It's quite useful. It tells you what it is, names and places, dates, that kind of thing (I7).

Another member of the same group had mixed views, commenting,

For me, I suppose I like it just because it reduces it from being an intimidating thing to the idea that it's just six boxes and other material at the back there. So for me, I suppose it kind of condenses it down to me to make it seem more manageable at this stage than it is at that stage. But there's no detail to it particularly, only bits and pieces … (I9).

Another person remarked,

I think it can be classed as a make-do measure like the one we've just looked at [i.e., the Summary list]. It's anything better than [nothing]. There's no order to it. You'd have to just flick through it and see if anything catches your eye (I10).

However, others viewed the box list in a more positive light than the summary list:

[*Annual Reports* and box lists] were the two kinds of things that were pretty standard thirty, forty years ago, I think. There were lots of things like this and then you had to work your way along from there … if I was [researching] a local history of Manafon, for example, I see box 4, deeds relating to property in the parish of Manafon, and then I'd ask for that. I wouldn't want the following thing after of it because it's the parish of Newtown or something. So … we're getting up the ladder. We're getting better and better. Not perfect … It's better than nothing. It's a long way better than the 1937–38 thing (A3).

Another member of the group noted that "… in this we're getting a lot more personal names than we did in the *Annual Report*," (I4) while a third echoed the viewpoint of another person, who declared, "I particularly like the end here, where it states material transferred to the Department of Printed Books and Department of Prints, Drawings and Maps. If the collection has been dispersed, it shows where the other documents have gone to. I think that's very useful" (A4).

The record agent was one of the most experienced searchers among the focus group participants. In a follow-up conversation, he delivered his verdict of box lists:

What can I say? Useful if there's nothing better. This in terms of an abstract of what's available is not bad actually for the sort of things I'd be looking for, but the arrangement is such that obviously it would be awkward for me to get the information out. However, that is an instance where if that were online, you'd just put search terms in the thing and if it wasn't something like that which could be spelt sixteen different ways, then it might actually produce the sort of thing I'm looking for. Limited usefulness, but I have seen worse. Certain lists, preliminary schedules, which I believe they are somewhat euphemistically called, preliminary/permanent or whatever the term is, really are utterly useless, but this thing could be worse (R1).

When asked about his experience of using this type of finding aid, he recalled,

In some instances, I've had very little choice [other than to use box lists]. Not often, thankfully…. It needs so much time to go into this sort of level, but occasionally I get something thrown at me … and you plough through whatever you think might just be useful. It's fairly soul-destroying because you don't often find anything in these boxes which you're actually looking for … (R1).

Another experienced user of archives from the same group claimed,

Everything's of use, you see, but … wanting something better, you know? People going through that would have to have a look at the documents. Say I've got a property in Bettws Cedewain, for example, and I notice that there are deeds in this box. Well, I don't know what the name of the property is, do I? So you'd have to go through those deeds so that probably means a runner would have to go down and get those out. Of course, you'd have a look at them, oh no, that's no good, send them back. More work, and so on and so forth (I1).

Collection-level description (F)

More than one person admitted to being unfamiliar with terminology used in this finding aid – "fonds" being a term quoted by three people in three different groups. There was a feeling among participants throughout the focus groups that the description "looks more directed to archivists than users" (R1) but still offered researchers "a good starting point" (A1). A trainee archivist reiterated the fact that not all the information provided was likely to be of interest to everyone when she observed, "The average person isn't going to be interested whether it's *ISAD(G)* or not, but … that's quite useful information for professionals" (I7).

One of the academics drew comparisons between the content of the collection-level description and the information found in the *Annual Report* because "Essentially it contains the same kind if information … but it breaks it down more … it does have archival jargon in it, which we might not all be familiar with …" (A2).

In one focus group, nobody had come across collection-level descriptions, but one leisure historian said, "It does give you a lot of information. If you are sitting at home thinking, 'I wonder what they have got in the library about Cefnbryntalch?' you could come up with this. Again, it's all work you could do beforehand, isn't it? The more information you go armed with to the library, the better" (L9). The detail of information offered was queried by another member of this group, who asked,

It doesn't give you a lot of detail about the actual content of the collection does it, in a way? It tells you about how it's been catalogued and where it's available, but one of the earlier [finding aids] would give you more detail on the content, which you might need to know whether or not you might want to follow it up (A6).

This point had been picked up by others; two people from other groups, who had used this type of finding aid before, commented that in some places the sample finding aid was a bit brief. Similarly, another mentioned that "It's interesting that the subject index doesn't include personal or place names. There are categories, but there are no entries … I would expect to at least find the names of the families" (I4).

One of the trainee archivists preferred this structured description to earlier unstructured efforts:

I quite like the system of arrangement. You can get a mental picture in your head of how the collection … that's one of the things I find difficult with very early lists from the 60s and so on. I don't quite know what process they've gone through, it's just names and numbers. Well, I find it quite confusing, so I quite like the way it's broken down, more transparent really (I2).

Several people said that they preferred the format of the collection-level description and the additional information it provided about the archival context, access arrangements, the cataloguing rules, and the name of the person who had drawn up the description.

Interestingly, the retired archivist was the only voice of dissent in his group, admitting that he had never encountered this type of finding aid before and that

… there are a lot of headings I would never use…. There are things there you don't really need. Extent – so many cubic metres … There's a lot of repetition, isn't there? … ah, there's related material. That's OK, it would be useful to get a printout from the various archives to see what they've got (I1).

A member of the pilot group had also had similar thoughts about the usefulness of some of the headings and said that it depended on whether the finding aid had been "set up for the benefit of the user or the librarian because … it says extent 0.172 cubic metres. As a user, we don't need to know that, do we? … There seems to be a lot of stuff here we didn't need to know … accruals are not expected …" (L6).

However, another member of the pilot group believed that these finding aids would be more useful to researchers unable to speak directly to the archivists looking after the material:

In particular for someone who's coming in from Germany or somewhere, to look this up, they probably would need something like this. I think we'd speak to the specialists to know our way around something like this, but to the outsider, I suppose something of this sort would be an advantage (L3).

One person carrying out doctoral research in history said she had used collection-level descriptions during her research work:

I got these for myself for the Aberglasney collection and found it very useful. Lots of information about the language, scripts and material, and conditions of access as well. Any copyright issues which you should be aware of…. I always like the allied materials as well because I think that's quite handy (A4).

Another vote of confidence came from a retired academic historian, who declared,

But there you are, it does say … hard copies of the catalogue available at NLW and HMC, an online catalogue can be accessed from … This is a good building block, isn't it? It starts you off. You print this out, you file it, and carry on from there…. At this stage of searching, this is probably what you need because it points you in the right direction (A3).

This opinion was confirmed by a trainee archivist, who stated that

… things like the Archives Network of Wales, I thought that was a good starting point. It had a lot more information, especially with the administrative history, content and so forth … and it's still a broad overview anyway, and it had a link to the repository on the Archives Network, so you can go straight to them and look at the detail … (I8).

Three of the other trainees in the group were also positive in their praise for this type of description, one of them saying,

I personally like the Archives Network Wales … I like the layout of it and I like the amount of information it tends to give you. I know of other people who don't like it at all but I personally do … They all follow the same sort of pattern (I7).

Another positive comment from a fellow participant was,

I like it just because it gives a very basic overview of the collection and how it was catalogued … from the point of view of just reading about how the collection was done in a very basic form, in a reader-friendly form, I think it's quite an effective tool (I9).

However, this person had reservations with this particular copy of the finding aid:

The index terms at the end, I don't quite understand why they're there. Maybe it's just this particular collection because when I clicked on any of the actual links, all it did was bring you back to here anyway. So you're just in a perpetual loop. If it was linking to the actual collection at the National Library of Wales, fair enough, it would be of benefit … (I9).

Other attributes given to this finding aid were that "it actually tells you what finding aids there are available and where they're available" (I10) "and for those who have a more detailed interest, it does tell you about rules and conventions" (I7).

Traditional catalogue (G)

A number of people said they would be happy to use the traditional catalogue and it was "Great if you know the date" (I8), and "I suppose if it's all you've got, it's very useful, but you can obviously see it has limitations … I think any aid is helpful, and you have to be grateful for any help you can get" (L9). However, this finding aid was criticized for various reasons, ranging from the fact it had no introduction, to the view that it was "virtually useless" (I3) and "very limited in many respects" (A1). Some people thought that the catalogue itself was "the type of thing that really needs an index to make it workable" (I10), or was more usable in electronic form, although another person had not found the online version particularly user-friendly.

Some participants noted that the catalogue was chronologically arranged, but they did not like the non-sequential numbering. A few thought it could be made more useful if it were rearranged into "some kind of order … so you'd have 1,2,3" (I10).

The archive students in particular were concerned with the lack of explanation and interpretation and thought the catalogue could be improved if an introduction were provided, giving a brief explanation of the terms, such as party one, party two, archaic terms, and title deeds. A few people noticed that the catalogue did not contain references to non-manuscript material: "… it's only deeds and documents. Is it all of the catalogue?" (I3) and speculated on the potential impact that the separation of the material might have: "I know it causes trouble … [people are] unable to find things because they've been split up. The connection between this map and this book and the rest of the collection is not just physically but intellectually … gone and they can't find it" (I4). Perhaps this quotation sums up most people's views of the traditional catalogue:

I must say I find it quite confusing really, just a list of numbers and figures and names, and as you were saying, there's two places for reference that you've got to go to and having to find all the cards there could be a problem. Often when you go to a place where you've not been before you won't know where the cards are that correspond to the right index and the whole thing just becomes a mystifying experience. You have to ask for help and very often that help's not available because it's busy and whatever, and so I much prefer the more modern thing. I just think it sort of deconstructs the whole [cataloguing] process … and it's more effective really, more transparent, accountable … (I2).

Card catalogues and indexes (H)

The content of the various card catalogues and indexes generated a variety of comments. Some people were happy with the card indexes, which linked to names and marriage settlements found in the traditional catalogue of deeds and documents (G). However, there was general confusion about the card catalogues, which provided references to and descriptive information about material that

was not included in the main catalogue (G). Some participants regarded these old card catalogues as "apparently a series of random letters" (I7) as there was no obvious cross-reference system to the main estate collection. A librarian (I4) explained their source as follows: "…in the Library … [there are] ten or fifteen different card catalogues, scattered all over the place…. [and there are] dozens of card catalogues that the public doesn't have access to, in the back rooms" (I4).

Despite most people's negative views, some were more pragmatic in their outlook:

[That card catalogue is] not immediately useful but if you are researching into what it's got inside it, you find out. It's a little hurdle that you've [got to] get over, not impossible to get over … it's not user-friendly at all, but that's the way they did it … all these things were invented before the computer. You've got to get into the kind of mindset of the people who originally had to unload that truckful of boxes and said, "What am I going to do with these?" … as time has passed, things have become more sophisticated and we've got more questions and we expect to get more out of it. No, this is like an archaeologist, looking at a broken shoe or something (A3).

"Integrated" catalogue (I)

The "integrated" catalogue was more widely acceptable to people who appreci-ated the fact there were more finding tools, such as the contents page, the in-troduction, the divisions into series, and the indexes. The pedigree was viewed as a source of useful information to some, because "it's very often difficult to see how a family hangs together" (R1) and it could be used to place "people in context" (I4). The standardization of names was seen as useful and generated a great deal of discussion in some groups. Perhaps the only issue was whether there were too many divisions, with one saying "that's the flaky bit as far as I'm concerned" (R1).

One academic was more enthusiastic:

Yes, this is very user-friendly, easy to pick up and understand it in terms of the sections and sub-sections, and … it uses a lot of the elements of *ISAD(G)* anyway, but it does it without any of the jargon, which I think makes it much more user-friendly to people who are non-archivists, things like fonds, series and sub-fonds, and things, which we use, so I think this is eminently usable, yes, to the novice researcher as well (A2).

Generally, this catalogue met with favourable opinion across the groups. The following quotation reflects an almost universal view:

This contained the good features we'd seen in previous catalogues but really user-friendly because it had a nice index, with a page number as well. It clearly told you what each type of record was, whether it's sales papers or family trusts, or whatever, and

then it would give you a bit of explanation about the names, and then it has actual name index, place index, subject index at the back. A nice overview introduction if you're coming to the collection fresh. A nice flavour of what it's all about and who people were, a very nice family tree. Yes, personally, I thought that was very user-friendly. If it was available, a new researcher could easily come in and find some things using that (I7).

ISAD(G)-compliant catalogue (J)

Opinion was divided on this final catalogue, which was in electronic format. A number of people had already said that they preferred using online finding aids, but others refused to use computers, and although the catalogue was shown to them, they were reluctant to use it themselves. Perhaps the most enthusiastic supporter of this catalogue was the retired academic who stated that it was "Breathtaking," "stupendous" and that "modern researchers are spoiled rotten. They don't know they've got it as easily as that…. Somebody has done months of work in order to save you a week of work" (A3).

One of the current academics was also positive:

Yes, I think generally *ISAD(G)* was obviously designed to simplify things for searchers so that you weren't getting too used to so many in-house styles. I like that because I know the terminology and I know when I look at 'file', I know in my head what I'm looking at and what level that is and where it nestles between series and between item, so I find that quite helpful in terms of understanding the context and relationships between records but I don't know how other searchers who aren't familiar with the workings of *ISAD(G)* from an archival point of view find that (A2).

Interestingly, the retired archivist was perhaps the most critical of all, saying, "It strikes me as more of a box list than anything… a glorified box list … [because] they've got all the information for umpteen documents in just one entry." Reluctantly, he said he "would accept that as the way forward" (I1), a view which he expanded in a later discussion:

There is a balance which has to be made between the staff available to catalogue things, the estate collection, and what's practical nowadays. In those terms, then that would be the compromise, but it does seem to be more of a glorified box list, doesn't it? "File: 6 items dealing with property in the parish of so and so and …" In our day when we had more time and leisure to … do research on the collections, you could then with a bundle of deeds show the relationship between the documents within that bundle, chronologically, and see the various ways the person got the estate … from marriage, marriage settlements, … and then you could see, perhaps in the seventeenth century, they were going to the wall…. that's what you can see at a glance with those schedules. You can't see the history of the land with the modern ones, no (I1).

One of the record agents also expressed negative views, dismissing the catalogue as: "… an archivist's schedule, not a searcher's schedule to my mind …

[and] in terms of gaining information, I think I'd often find it quite hard to use …" (R1). He elaborated his point in a later conversation:

… this sort of schedule [Garn] is fair enough on screen, but for the most part, I find it easier where you can flick rather than manipulate the screen. Is that my age or what? I wonder how many other people feel that? As I say, the combination of ways of getting at information … I've got to get the information, therefore I'm going to get it the way that appears the most effective to me. If that means using search terms through this, well, in this instance, yes, this is probably one I would use, online rather than the original volume, but I think it probably will continue to horrify quite a large number of people (R1).

Other comments

To conclude the focus group sessions, participants were asked if they had any other comments they wished to add. Several participants took the opportunity to touch upon issues concerning visual impairment, the effect of the archive networks upon users, and the range of finding aids available for archives. One of the archivists said that ANW had increased interest in Welsh archives, and based on her county record office experience, "We found that a lot of people contacted us then about some of our collections, but you always had the problem people would say, 'I'd like a copy of the whole collection,' and you had to deal with that" (I5). This suggests that in order to benefit from the new archive networks, many members of the public require guidance on the sort of information they could expect to obtain from this kind of finding aid, and how they could then use the results of their searches to call up primary material to advance their own research interest.

General concerns relating to knowing what was available in an archive repository and how to access it were raised by leisure historians. One voiced the thoughts of several others when she declared,

I didn't realize that there were so many aids to accessing that information and that's certainly where I struggle, is knowing how do I find this information that I know you've got, whereas now I know that you've got catalogues and everything else, it's going to be much easier … you sometimes do feel that you're inadequate because you don't know the system … I think the aids are fantastic, it's the knowing that they're there, is the step that you need to take and that's the step that needs to be, I don't know, publicized, made easier for people to know about, is that there are all these aids there to help you. I think we all realize that there's a wealth of information available in the National Library and the archives and everything else (L9).

Many archive repositories already issue guides relating to popular areas of research such as family, house, and local history, which are directly relevant to this group. A brief search of the Internet will reveal such information, but the person just quoted was someone who did not use computers and perhaps was unaware of the potential guidance that could be obtained in this way. Some also

recognized that limited resources hampered the amount of help and guidance that could be offered to individuals, but perhaps the crux of the matter was highlighted when another participant stated, "They're very helpful when you ask for something special. They'll do everything for you, but you've got to know what you want to begin with" (L10).

Conclusion

The research reported in this paper evaluated user perspectives on archival finding aids because little research of this kind had been identified previously. The specific context was a complex type of archival holding: the records of landed estates in the UK, which are rich in informational value but unusually challenging both for archivists who catalogue them and for users who are necessarily dependent on good finding aids.

Many of the sample finding aids considered by the focus groups predated *ISAD(G)*, and all presented problems of different sorts. When considering the results, it is worth noting that while all the participants resided in Mid Wales and were mostly familiar with finding aids provided by the local archive repositories, the examples of finding aids used for this study are typical of those provided by UK archives for estate collections.

Several significant findings emerged. First, most people preferred to consult an archivist when searching for archives. The more experienced tended to carry out electronic searches and then ask whether there was further information available, whereas many of the less experienced asked for help at an early stage. Although it is possible to speak to an archivist when visiting an archive repository or via telephone during office hours, this preference for consulting an archivist has implications for remote users searching the online archive networks outside business hours.

Second, some users were unaware of key archival finding aids and related resources; also, those who had heard of them did not make use of them to the extent expected. Basic guides, such as those of the NRA (A), for which the indexes are available online, and collection-level descriptions (F), which are freely available online via Archives Wales (formerly ANW), were not widely known or used by the non-archivists. This suggests a need to promote awareness of the potential use of these kinds of resources, perhaps in the form of talks to targeted groups, such as family history societies and university departments, or the distribution of leaflets to these groups.

Third, comments on the nature of some of the finding aids are worth noting. Some, such as collection-level descriptions (F), were described as lists for archivists rather than for researchers. Participants commented that this particular format contained information that they did not need to know, such as the extent of the collection, whether any accruals were expected, and so on. One person suggested that perhaps the public could have access to a version of the col-

lection-level description different from that used by archivists, who needed to know certain information.

Turning to the modern *ISAD(G)*-compliant catalogue for the Garn Estate (J), many were enthusiastic, but some would not use a computer to browse or search the catalogue. Interestingly, a retired archivist characterized this finding aid as nothing more than a glorified box list, whereas a retired academic was perhaps the most enthusiastic supporter of all, stating that he wished there had been such lists available when he was actively researching. Finally, the participants did not appear to hold strong views on the type of finding aids made available as long as they could find ways into the archival material.

Of particular note is the fact that all participants agreed about the need to have access to both paper and electronic formats, although some stated a preference for a particular format of finding aid. Some who were happy to use either format stated that they used paper and electronic formats in different ways for different purposes. They conducted targeted searches using electronic means, but found the paper finding aids easier on the eye and useful for conducting broad speculative searches leading to serendipitous findings. It was noted that some of the older finding aids with dense text, such as the summary list (D), could be searched quite effectively in their electronic form. Hence, there are convincing arguments for retaining both formats.

In an era that is moving toward the creation of virtual archives and "one-stop archive shops" that amalgamate information held by all archive repositories within a region or country, the focus groups revealed researchers' preferences for people, rather than leaflets or machines, to guide them in their use of archives. In addition, a number of people, from the age of 50 upwards, admitted their limited experience, or lack thereof, with online finding aids, and some displayed a marked reluctance to use computers at all. One person, who was quite open to the possibilities of using computers, experienced difficulties in doing so because of age and infirmities. This has significant implications at a time when more and more information is being made available online without the mediation of an archivist. Instead of widening access to archives, paradoxically the Internet could exclude a significant minority in society.

Also of relevance to this paper is the increasing availability of digitized archival material on the web. Yet cost and sustainability issues mean that the bulk digitization of estate records and related solicitors' collections is unlikely to occur, even though they are among the richest sources of local information and are extensive throughout the UK. This increases the need for effective finding aids that enable users to identify relevant records for their interests and to optimize their research value.

The period in which this research was carried out (between 2000 and 2007) witnessed great changes in the structure and format of finding aids in the UK. Traditionally, finding aids have been produced in paper format, but by 2007, not only had selected examples been retroconverted and made available via

archive networks, but archivists were also beginning to create new finding aids electronically. Despite these trends, anyone who wants to use material in the Cefnbryntalch collection and comparable collections today must still consult the same finding aids (or equivalents) shown to the focus group participants in 2006–7. However, although the individual finding aids may not have changed, efforts are under way to investigate and develop new approaches to "resource discovery," both within and beyond the archive profession and among large repositories. For example, the UK Archives Discovery Network (UKAD)[49] has been established for professionals who share these aspirations for development, especially for open access systems that link images with content descriptions and finding aids.[50] This initiative heralds wider aspirations to provide users with the ability to search related databases simultaneously for materials of interest, whether they are held in archives, libraries, or museums.[51] On a smaller scale, the NLW's home page provides users with the opportunity to search various catalogues for its collections or to use Aquabrowser (a system based on VTLS Virtua),[52] which is promoted as "an easy way to search the Library's full catalogue." As yet, however, the full catalogue is not comprehensive, so anyone interested in using estate collections will still need to search the Archives and Manuscripts database via ISYS:web as well as Aquabrowser to ensure complete coverage.

A final reflection on this project is that creating and maintaining effective finding aids for complex collections is perhaps the greatest challenge for today's archivist, given the amount of time and expertise required. User needs must be balanced with the needs of the records and the demands for service delivery. Archivists must therefore make a judgment about whether to provide fewer but more detailed finding aids, or less detailed lists to "open up" more uncatalogued collections.

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49   UKAD, *UK Archive Discovery Network*, http://www.ukad.org/ (accessed 1 December 2012).
50   Melinda Haunton to Archives-NRA@jiscmail.ac.uk, Introducing the UK Archives Discovery Network (17 August 2009), https://www.jiscmail.ac.uk/cgi-bin/webadmin?A2=ind0908&L=ARCHIVES-NRA&P=R18896&1=ARCHIVES-NRA&9=A&J=on&d=No+Match%3BMatch%3BMatches&z=4 (accessed 1 December 2012).
51   Jane Stevenson to Archives-NRA@jiscmail.ac.uk, Be Part of Archives Discovery Forum 2011 (5 January 2011), https://www.jiscmail.ac.uk/cgi-bin/webadmin?A2=ind1101&L=ARCHIVES-NRA&P=R4163&1=ARCHIVES-NRA&9=A&J=on&d=No+Match%3BMatch%3BMatches&z=4 (accessed 1 December 2011).
52   NLW, AquaBrowser, http://wales.aquabrowser.com/ (accessed 1 December 2012).

County Record Office, Wales, as assistant archivist (1994–96) before being appointed a development officer for distance learning in the Department of Information Studies (DIS) at Aberystwyth University in 1997, where she began doctoral studies in 2002. Following completion in 2007 of her thesis on "Cataloguing Estate Records and the Needs of the User: A Comparative Study," in October 2008 she was appointed lecturer in DIS, where she coordinates modules in palaeography and diplomatic and in administrative and historical studies for the diploma/MScEcon in archive administration, and also teaches courses in the information and library studies program and in the history program.

Appendix 1
Screening questionnaire for potential focus group participants

1. **What is your age group?**
   ☐ 20s   ☐ 30s   ☐ 40s
   ☐ 50s   ☐ 60s   ☐ 70+

2. **How would you describe yourself?**
   ☐ Academic researcher   ☐ Archivist   ☐ Family historian
   ☐ Local historian   ☐ Record agent   ☐ Student

   Other (please specify)

   _____

3. **Which type of archives service have you visited?**
   ☐ National (e.g. National Library of Wales)
   ☐ Local (e.g. Powys County Archives Office)
   ☐ Specialist (e.g. National Monuments Record, Wales)

   Other (please specify)

   _____

   ☐ None

4. **If you have been to an archives service, how often do you visit?**
   ☐ Daily   ☐ Weekly
   ☐ Monthly   ☐ Yearly

5. **What type of archives / records have you consulted there?**
   ☐ Parish registers   ☐ Chapel records   ☐ Census
   ☐ Newspapers   ☐ Maps and plans   ☐ Estate records

   Other (please specify)

   _____

6. **What level of experience do you have of using archive catalogues and indexes?**

	At the archives service	Online
Expert	☐	☐
Experienced	☐	☐
Inexperienced	☐	☐
No experience/ unsure how to start	☐	☐

7. **Have you used online resources for family / local history research?**

  ☐ Yes   ☐ No

If yes, which ones?

_____

Name _____

Telephone number (if you are willing to be contacted after the focus group to clarify any answers or to see if you have any further thoughts on the topics under discussion)

                           _____

Thank you for your help