

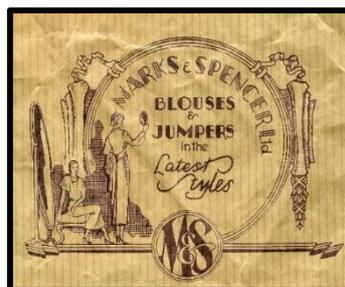
M&S ARCHIVE

Collection Management: Collection Development Policy



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1 MISSION STATEMENT

The M&S Archive enables Marks & Spencer to celebrate and utilise its rich heritage for the good of the business, its customers and the wider community. As a vital business asset, the Archive actively preserves, develops and facilitates access to its unique collection for commercial innovation and inspiration, and delivers a dynamic programme of public engagement, using the collection to support and inspire the community.

2 AIM AND SCOPE OF POLICY

The purpose of this Collection Development Policy is to:

- Ensure that the records in the M&S Archive accurately reflect the history and development of M&S as a national and international business from 1884 to today.
- Manage the archive collection effectively to ensure that appropriate deposits are made and do not duplicate material already held in the archive.
- Maintain consistency in dealing with internal and external depositors to the collection.

3 DATE OF APPROVAL AND REVIEW PROCESS

This policy was approved by Amanda Mellor, Group Secretary, and Alison Houston, CIC Director, ex-Head of Archive and Archive Advisor, in September 2017 and will be reviewed annually.

The review process for this policy will involve measuring the performance of collection management activities and their underpinning objectives, plans and procedures, and making recommendations for progression and improvement. Policy review will also ensure that all objectives, plans and procedures are appropriate to the scale and nature of the Archive and its activities.

4 COLLECTIONS DEVELOPMENT: CONTEXT

The M&S Archive represents one of Britain's most important corporate archival collections, owing to the long history of Marks & Spencer as a key retailer on the British high street and the extensive and detailed nature of its rich holdings.

By defining the collection development of the Archive, the collection can continue to support access to internal and external users and contribute to the preservation of retail history for the future.

The Archive is committed to maintaining a dynamic, living archive which informs and supports the business needs of the Company. The research and enquiry service supports the brand and the collection is actively used to inspire new product, develop current thinking and inform business strategy.

The collection moved to a new, purpose-built repository on the campus of the University of Leeds in 2012. Building on an extensive collection and documentation audit which was undertaken in 2009-2011, the Archive Team actively develops the collection through seeking new acquisitions from internal departments within M&S and encouraging donations from members of the public.

5 COLLECTION PRIORITIES

The Archive Team seeks to develop the collection by focusing on the following key areas:

5.1 Key areas of collecting:

- Papers of prominent figures involved in the development and management of the Company.
- Records relating to the development of company policies and principles.
- Head Office department papers reflecting key processes and innovations within the Company.
- M&S clothing, accessories, homeware and food packaging including examples of key merchandise from product ranges

which are identified as top sellers, and products that represent innovative technology or design. The Archive also seeks to collect iconic M&S pieces which reflect the culture of M&S and the retail environment, pieces which have been worn by someone in the public eye, and anything inspired by the Archive collection, or that uses an Archive print.

- Papers of the M&S founding families; Marks, Spencer and Sieff families.
- Records relating to M&S store development, from 1884 to the present.
- Records relating to staff welfare and working life, from 1884 to the present.
- Advertising and marketing material, from 1884 to the present.



5.2 Developing weaker areas

The M&S Archive also seeks to address comparatively weak areas of the collection by collecting:

- Records relating to M&S international operations from the mid-1960s to the present
- Records relating to M&S innovation and technology from the mid-1960s to the present
- Examples of vintage M&S menswear
- Examples of vintage M&S childrenswear
- Examples of vintage M&S footwear

The Archive seeks to develop these areas through working with M&S internal departments, overseas partners and encouraging donations in these categories from the public.

These priorities are continuously reviewed in light of collection management activities. Updates are noted in procedural documents and will be added to this policy during annual updates.

5.3 Exemptions

The M&S Archive is the home of M&S' documentary heritage. The Archive will not acquire material that is not created by M&S or does not have its provenance in M&S.

- Examples of products must have their M&S labels (or markings) intact.
- Items will not be accepted if their poor physical condition prohibits public access (and if the cost of the necessary conservation treatment is disproportionate to their historical value).
- Copies of archives held elsewhere will not normally be accepted unless there are exceptional reasons for keeping them (for example, to use alongside existing collections).
- Materials that duplicate or are very similar to current holdings will not be accepted, unless there is a strong reason why duplicate material may be of benefit (for example, for learning and outreach purposes using the Handling Collection). If a donation is to be added to the Handling Collection, permission will be sought from the donor.

Where material is offered to the Archive that is more appropriate to another known archive or organisation, the donor will normally be referred to that archive. This may include specialist media for which the Archive does not have acceptable means of ensuring continued preservation and access.

The Archive maintains an awareness of other institutions collecting in similar areas, and this informs collection development priorities.

6 COLLECTION DEVELOPMENT METHODS

As a living business archive, the M&S Archive's internal transfer programme is a vital source of records. The Archive also encourages donations from members of the public.

6.1 Internal transfers

The Archive works closely with departments across M&S to ensure the direct transfer of relevant material to the Company Archive. This is achieved by actively working with each M&S business unit and department to identify material that meets the criteria of the collection priorities, and reflect the projected future needs of each business unit.

The material identified for transfer from each department is summarised in a bespoke checklist, which is regularly reviewed with the department.

The checklists include specified timescales for the transfer of material, covering accruals to existing series and pro-active identification of additional material for permanent preservation.

The Archive has recruited Archive Ambassadors in key areas across the business. These Ambassadors help to identify material for transfer to the Archive based on agreed checklists and collecting priorities, and assist with the physical transfer of this material to the Archive. Recruitment of Archive Ambassadors is ongoing, focusing on hitherto untapped areas to ensure activity across the whole business is represented.

6.2 Public donations

The Archive actively encourages external donations from members of the public and former staff. Key messages are publicised on the website of the M&S Archive and to visitors to the Marks in Time exhibition. Calls for donations may also be made through regional and national media, where this is appropriate in the context of coverage highlighting particular items or subject areas within the collection.

Donations must be accompanied by a completed Donation Form.

Contact details for all depositors will be retained, and any requests by depositors to be contacted if their donation is ever displayed in the exhibition will be recorded. The Archive welcomes repeat donations from depositors but will not approach previous depositors as part of its collection development activities. All depositors were notified about the relocation of the collection in 2011 and the opening of the purpose-built M&S Archive in Leeds in 2012.



6.3 Conditions associated with acquisitions

6.3.1 Ownership

The Archive seeks to acquire material from external donors as a gift. It does not offer payment in return for donations to the collection or actively seek to purchase items for the collection.

Permanent/temporary loans are only considered in exceptional circumstances.

6.3.2 Copyright

The Archive actively seeks to acquire third party copyrights and intellectual property rights that may exist in the material being donated to the collection. Any remaining usage restrictions are recorded in the Accession record.

6.3.3 Formats

The Archive seeks to acquire material in either analogue or digital format. For evidential purposes, the Archive stipulates a preference for receiving digital material in its original 'as created' format wherever possible.

There is no requirement for products to be donated with their original packaging although this may be added to the Archive along with the product if it is present.

6.3.4 Digital records

The Archive will collect born-digital records in a wide range of formats, which may include (but are not limited to) databases, spreadsheets, Computer Aided Design material, images, emails, sound and film. The transfer of digital material is subject to discussion on a case-by-case basis to identify and agree the most appropriate format

for transfer; most often by email, link download or Onedrive.

For internal records this may include direct harvesting from shared internal storage and M&S.com.

Records which exist in both digital and analogue form will be collected in the form in which they were distributed. An additional digital version may be retained as an access copy.

Processes for transferring digital records will be updated annually as business capabilities change.

6.3.5 Access

The M&S Archive is committed to facilitating the fullest possible access to the collection. Individual items, or the majority of items, within a public donation must be available for use by all researchers. Copyright or Data Protection restrictions may apply to specific items. Any restrictions should be declared at the time of donation and specified in the donation agreement.

For operational business reasons, or in compliance with Data Protection legislation, personal or commercially sensitive material may be restricted or closed to the public.

- The Archive works with departments across M&S to establish closure periods for records of a commercially sensitive nature, where closure periods will be for either 10 or 30 years.
- Highly confidential records may be closed for longer periods. These include board minutes, production methodology, design files, style files and documents which detail product manufacture.

6.4 Partnerships

In the longer-term, it is hoped that partnership working with other collecting organisations within the heritage sector, and the building of relationships with communities as part of the Archives' outreach and learning work, will also promote the donation of material to the collection.

6.5 Unsolicited donations

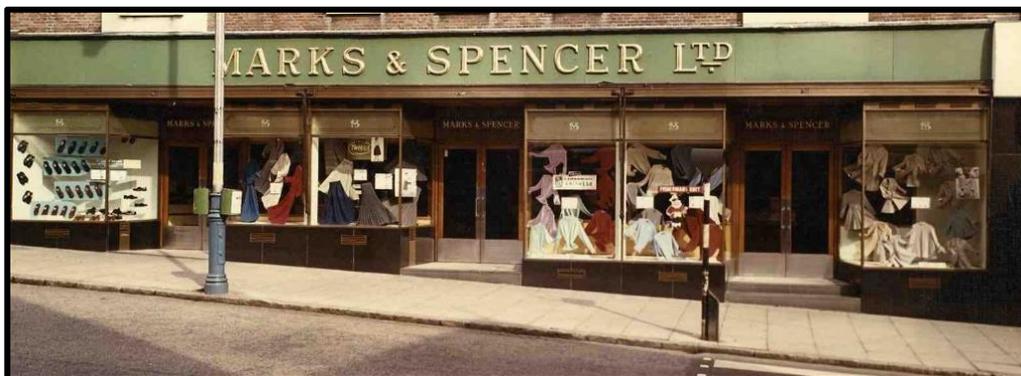
The M&S Archive will apply its standard appraisal principles to any unsolicited donations that are sent to the Archive.

6.6 Oral histories

The Archive runs a programme of oral histories which aims to capture the memories of long-serving colleagues throughout the business. These are added to the Archive Collection along with a transcript of the interview.

7 SELECTION AND DE-ACCESSIONING

The M&S Company Archivist and the Archive Team, if necessary, in consultation with the Company Secretary and M&S Legal Team, reserves the right to judge which documents are of sufficient quality and content for permanent preservation. Material which does not meet the requirements outlined above will not be accepted.



7.1 Appraisal principles and methods

Appraisal will be carried out at several points in the accession process to ensure that accessioned material meets the conditions set out in this policy.

7.2 Internal transfers

Input is sought from M&S business units on the groups of records or categories of information that should be selected for permanent preservation. This informs the content of transfer checklists (see section 6.1) which reduce the amount of appraisal that is necessary when internal transfers arrive at the Archive.

7.3 Public donations

Offers of donations from members of the public will be checked against the Archive's collection priorities before arrangements are made for transfer.

7.4 Appraisal at the Archive

On transfer to the archive, donations will be appraised by the Archive Team against the collection priorities (see section 5).

- Accessions will be appraised at file level, and duplicates will be weeded.
- New accessions will be examined and condition checked. Any items in poor condition or displaying signs of pest infestation, dampness or mould may be refused (see section 5.3).
- Sampling may be carried out on bulky transfers or donations.
- Due to the greater volumes associated with born-digital records, they may be appraised at a higher level using macroappraisal approaches.

7.5 Focused collection audits

A rolling programme of collection audits aims to inform the direction of future collecting and collection development

priorities, and review the areas of strength and weakness within the collection. Collection audits aim to confirm that only records and items of enduring historical or legal value are selected for permanent preservation.

The current 2017/18 focus is a Garment Audit. This involves condition checking each series of catalogued garments and ensuring that all catalogue entries are complete, enhancing any descriptions that do not currently meet the standards in section 6.1 of the Collection Information Policy.

The Archive will apply its standard disposals procedure to any garments identified for de-accessioning.



7.6 Disposals and de-accessioning

De-accessioning is the de-selection of material that is already part of the archive collection because it does not meet the stated collection development requirements, and is part of the professional management and development of archive and museum collections.

The Company Archivist and the Archive Team reserve the right to de-accession material previously accepted as a donation to the collection. Donors will be informed and unwanted material will be offered back to the donor wherever possible. De-accessioned material may otherwise be offered to another collecting organisation. De-accessioned material will not be sold.