

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 collection accurately reflect the 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

The Collection Development Policy was first approved by the M&S Company Secretary and the directors of the M&S Company Archive Community Interest Company in September 2017 and is reviewed annually.

The review process for this policy involves measuring the performance of collection management activities and their underpinning objectives, plans and procedures, and making recommendations for progression and improvement. Policy review also ensures 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 proactive 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.

Following investment in a digital preservation solution in 2020, the Archive makes the same provision for the long-term storage, preservation and accessibility of born-digital archives as for physical archive formats, as part of with M&S's wider Digital Transformation programme.

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.
- Support Centre (formerly 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 and franchise operations from the mid-1960s to the present.
- Records relating to M&S innovation and technology from the mid-1960s to the present.
- Records relating to the career experiences and achievements of M&S colleagues, with a focus on improving representation of currently under-represented colleague communities, including

Black, Asian, Minority Ethnic and LGBTQ colleagues and those with disabilities.

- 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 and encouraging donations in these categories from the public.

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

5.3 Exemptions

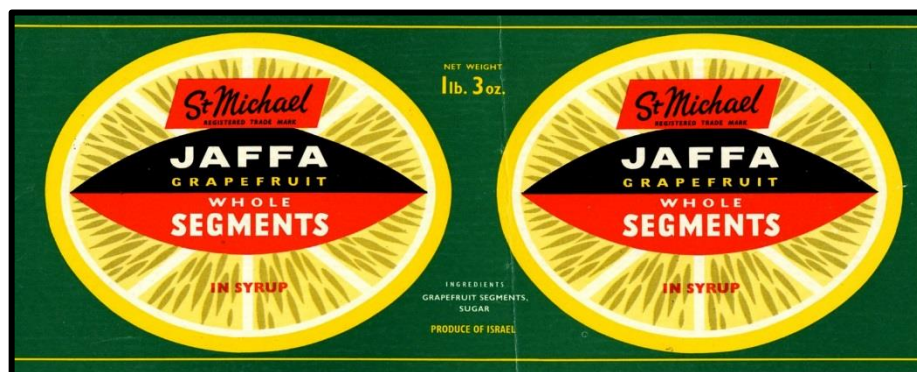
The M&S Archive is the home of M&S's documentary heritage. The Archive will not acquire material that is not created by M&S or does not have its provenance in M&S.

- 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).
- 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).
- 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.
- The only non-M&S created material that the Archive has acquired or will acquire is that of the Jaeger clothing brand, following M&S's acquisition of the brand in January 202, which has resulted, since that time, in the ongoing M&S Jaeger brand. As part of the acquisition, the Jaeger vintage garment collection was transferred

to M&S and to the Archive, to be managed in the same way as the core M&S collections. While M&S also acquired the Jaeger documentary archive collection (business records, marketing materials, catalogues etc.) under the 2021 acquisition, that material was already held on long-term deposit at the City of Westminster Archives, where it was well managed and accessible to researchers, and complemented other fashion brand archives held by the same institution. Due to these factors, it was agreed by the Head of Archive and M&S leaders that the documentary archive material would remain in the custody of the City of Westminster Archives, and the M&S Archive now pays an annual storage and service charge for the ongoing maintenance of this arrangement. The M&S Archive arranged the professional digitisation of key archive sources held at the City of Westminster Archives, to make these accessible to the M&S Jaeger design and marketing team.

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 working 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 Company Archivist was part of the steering group that created and implemented the M&S Information Management and Archiving Policy and Standards that were formally adopted by the business in March 2020. This was the first formal M&S policy and procedures on information management within the business. Updated on an annual basis, it includes transfers of material, digital and physical, to the Archive.

The Archive works closely with departments across M&S to ensure the direct transfer of relevant material to the 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.

6.2 Public donations

The Archive 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 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.

To secure the acquisition of rare, hard-to-source or highly significant items, the Archive has a small budget for exceptional purchases.

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 collects 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. Following the implementation of a Preservica digital preservation solution in May 2020, the Archive follows Ways of Working procedures for the ingest of new digital accessions into Preservica.

For internal records, the Archive supplements formal transfers with direct harvests from M&S SharePoint and the company's retail and corporate websites.

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.

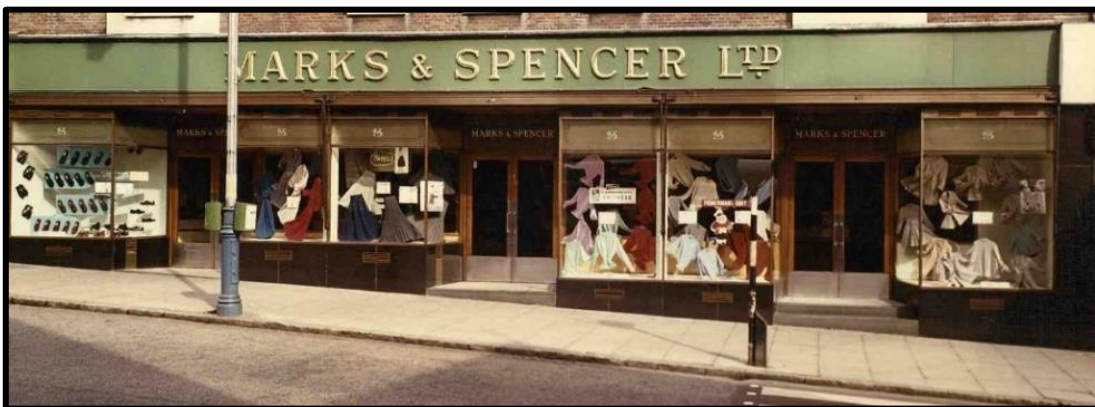
6.3.5 Access

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 and 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 governance 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, supplier files and documents which detail product manufacture.



6.4 Partnerships

The Archive is committed to 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. It is recognised that this may also promote the donation of material to the collection. The Archive works closely with the City of Westminster Archives in relation to ongoing storage, management and access for the Jaeger archive collection.

6.5 Unsolicited donations

The M&S Archive applies 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 M&S General Counsel and Company Secretary and wider 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 is 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 are 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 are 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 ongoing 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 notified 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.

