

M&S **ARCHIVE**

Collection Management: Collection Information 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

This policy sets out the M&S Archive's approach to collections information, and explains what information is gathered during the processes of acquiring, cataloguing and preserving archives. It aims to support efficient management of the collection and assist in decision-making processes relating to the documentation of the collection. It will also promote access to collections information and will support discoverability via the Online Catalogue and Digital Archive.

3 POLICY APPROVAL AND REVIEW PROCESS

This policy was first approved by the Group Secretary of M&S plc and the CIC board 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 INFORMATION: CONTEXT

This section outlines the context in which collections information is created and managed at the M&S Archive.

4.1 Background

The Archive's approach to collections information in the past has depended on the size of collections and their significance to the business.

Prior to 2010, cataloguing took place using in-house databases, with accessions records kept in Excel spreadsheets. Some correspondence was filed and retained according to accession number, and this is supported by paper accession registers which have mostly been

preserved. However, there are a number of historic accessions with no provenance or depositor information.

Since 2010, accessioning information, depositor information and cataloguing has been managed in Axiell CALM cataloguing software (CALM), the collections management system used by the Archive. Depositor correspondence and Donation Forms are also retained.

Since 2012, complete records of acquisitions have been retained including Donation Forms and relevant correspondence.

4.2 Legislative Context

The statutory framework governing collections information at the M&S Archive includes the Data Protection Act 2018 and the General Data Protection Regulation.

Institutional policies also affect the amount of information made public, particularly where commercial sensitivity is an issue. This is described in full in the Access Policy.

Specific standards relating to collections information are outlined in section 6.1 of this policy.

5 ACCESSIONING

Recording the provenance of material is crucial to ensuring the integrity of the Archive's collections, as it is the basis for all subsequent processes.

5.1 Public donations

Donations from members of the public must be accompanied by a donation form which transfers ownership to M&S and forms the basis of the accession record.

5.2 Internal transfers

Internal transfers do not involve a change in legal ownership and therefore do not require a donation form. Information concerning the transfer and provenance of the items is recorded in CALM, but correspondence is not retained.

Internal transfer checklists include guidance for internal donors on the information that should accompany internal transfers.

5.3 CALM accession record

An accession record must be created in CALM on receipt of both public donations and internal transfers, and it will include the following information:

- Donor
If public: Name and address of depositor (stored in CALM Depositor database)
If internal: Name and job title/department of person making transfer.
- Accession number
- Type of accession
If public: Donation
If internal: Transfer
- Date of deposit
- Approximate creation dates
- Summary description of donation including box list
- Extent of deposit
- Assignment of copyright if appropriate/any known copyright restrictions
- Any known administrative and custodial history, including the provenance of M&S products purchased by customers.

5.4 Publicising new accessions

New accessions will be publicised via the Archive's website once they are catalogued. New accessions will be periodically highlighted in social media content and events.

6 CATALOGUING

Cataloguing is an essential activity to support access to the collection both internally and publicly.

Approximately 64% of the collection is currently catalogued in CALM and descriptions for these records are searchable using the online catalogue. The Archive is committed to increasing the proportion of catalogued material through its cataloguing programme.

6.1 Cataloguing standards

All cataloguing follows internationally recognised standards; this is supported by a set of in-house cataloguing guides.

- All documents catalogued since 2010 are fully catalogued in accordance with the mandatory elements of the ISAD(G) standard (International Council on Archives, *ISAD(G): General International Standard Archival Description - Second edition*).
- All objects (i.e. examples of M&S products) are catalogued in accordance with the SPECTRUM standard (Collections Trust, *The SPECTRUM Standard*, v5.1, 2023).

Cataloguing also follows the following standards:

- International Council on Archives, *International Standard Archival Authority Record for Corporate Bodies, Persons and Families [ISAAR(CPF)]* (2nd edition, 2004).
- National Council on Archives, *Rules for the Construction of Personal, Place and Corporate Names* (1997).

Prior to the adoption of these standards, cataloguing was undertaken following a variety of individual styles, resulting in variation in the quality and comprehensiveness of the earlier catalogue. Catalogue entries which are not fully compliant with these standards are improved as part of the cataloguing backlog and focused collection audits (e.g. Garment Audit - see Collection Development Policy section 7.5).

6.2 Cataloguing priorities

Cataloguing priorities are reviewed as new material is added to the collection, and are based on researcher demand, historic significance and potential for future use. Up-to-date priorities are documented in procedural documents.

Like most Archives, the M&S Archive has a small backlog of material awaiting cataloguing in line with cataloguing priorities. This consists of accessioned material, the majority of which is box-listed to file or item level.

6.3 Catalogue structure

Due to the nature of the internal business records held by the M&S Archive, most cataloguing is carried out by function, in accordance with the collection structure detailed in the Collection Guide (at <https://archive.marksandspencer.com/collection/about-the-collection/>).

Significant collections of personal papers relating to former employees may be catalogued as a standalone series.

In 2018, M&S made changes to how its business is structured and reported, with 'Clothing & Home' and 'Food' managed as separate businesses on an operations basis, with their own financial performance accountability. That change has become fully embedded and M&S is now organised as 'a family of accountable businesses' within (and supported by the corporate function departments of) the M&S plc group: Clothing & Home, Food, International, Services (Bank & Energy) and Property. Cataloguing of post-2018 records must reflect these organisational changes, and the M&S archive collection hierarchy and cataloguing scheme was reviewed in 2025 to accommodate this.

6.4 Born-digital archives

Digital records forming part of hybrid collections, as well as born-digital material harvested from shared internal storage and marksandspencer.com, are accessioned and catalogued alongside analogue items. Access copies of born-digital records are saved alongside digital surrogates of analogue records. Access to digital material is in line with the Collection Care and Conservation Policy (section 9.1.5).

The methods for creating collections information relating to born-digital material will be updated annually as business capabilities change.

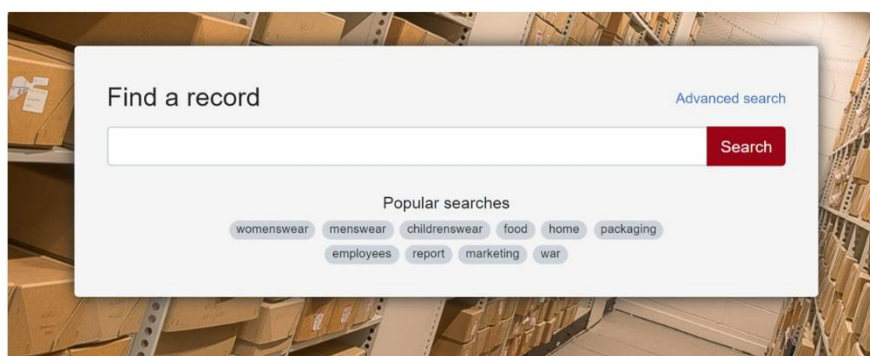
6.5 Online Catalogue

The M&S Archive has maintained an Online Catalogue since 2012, which can be used to search the descriptions of all catalogued material. A new version of the catalogue was introduced to the Archive's website in 2023:

<https://archive.marksandspencer.com/collection/archive-catalogue/>

This uses Axiell's Calmview product, to provide the front-end for our CALM catalogue information, and provides a greater degree of hierarchical context than was available within the previous catalogue interface.

Popular search topics are made available, to take the researcher straight to the catalogue records for items relevant to each topic.



Uncatalogued material is not listed in the online catalogue and is unavailable to the public, but will be made available to internal colleagues according to business need. Public access to uncatalogued material may be allowed, with requests for access being granted on a case-by-case basis.

A Collection Overview document and Collection Guide are also available to support user understanding of the archive collection; both are updated periodically with newly catalogued material.

To aid discovery of the Archive, entries are also maintained on Archives Hub and The National Archives' Discovery catalogue. Collection information published on Archives Hub is automatically harvested for inclusion on the Archives Portal Europe directory.

6.6 Staffing

All staff have a responsibility to support cataloguing. Cataloguing is managed by the Archivists, occasionally supported by volunteers where appropriate.

The Volunteer Policy lays out the basis for cataloguing by volunteers. Volunteers will assign all copyright in work they produce or create on behalf of the M&S Archive to Marks and Spencer plc.

7 DISPOSALS

On donation, the M&S Archive captures the donor's wishes regarding any material that is not suitable for preservation in the Archive (in reference to the Collection Development Policy).

Any disposals will be carried out according to the Collection Development Policy. All disposals must be recorded in CALM, including the reason for de-accessioning, attempts made to contact depositor and date removed from collection.

8 LOCATIONS

8.1 Locations Database

To support the Archive's obligations in the care of and access to collections, up to date information on the locations of all material in the repository is recorded in the Locations Database. This includes both catalogued and uncatalogued material, AV and outsized material.

Digital material is held in secure cloud storage and is managed using its unique catalogue reference number.

8.2 Loans

Archive items may on occasion be loaned to museums or other appropriate bodies for the purpose of display. The loan will be recorded in CALM, and a loan agreement will be completed and held on file.

9 SECURITY OF COLLECTIONS INFORMATION

Collections information held in CALM is backed up daily; donor correspondence by email is held in robust cloud storage and paper correspondence is stored in a secure filing cabinet.

10 HORIZON PLANNING

The anticipated end-of-life for our collection management system, CALM (a product provided by third party Axiell, which we use for collection management including accessioning and cataloguing, and which underpins our online catalogue and digital archive), necessitates migration to a new solution by the end of 2027. The M&S IT team is supporting this work, with a view to full migration in 2026/7, and budget is confirmed for this workstream.