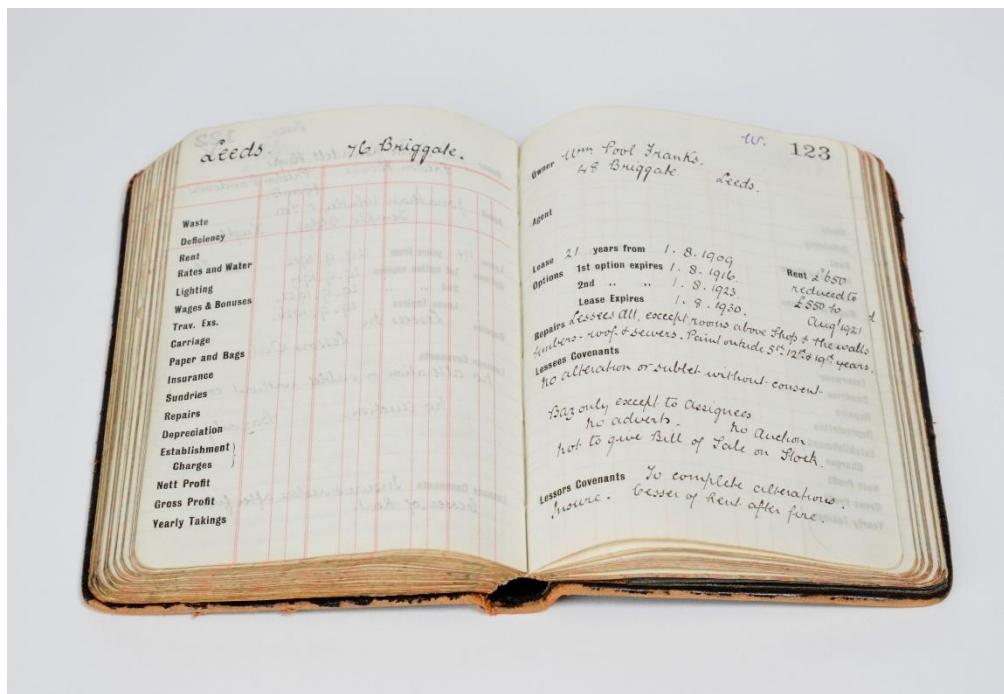


M&S ARCHIVE

Collection Management Policy



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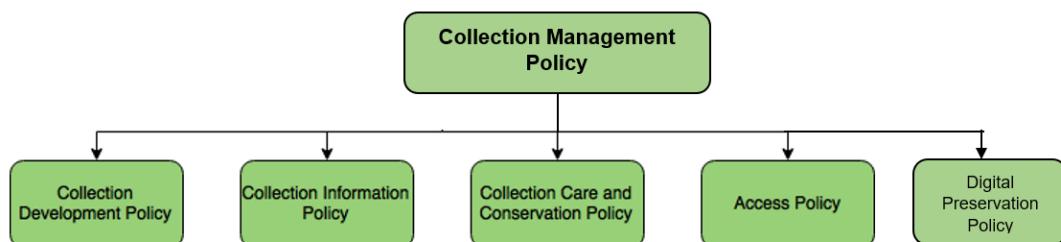
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1 MISSION STATEMENT

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 Collection Management Policy connects the five areas of collection management activity – collection development, collection information, collection care and conservation, collection access, and digital preservation – and explains how they work together to support the M&S Archive Mission Statement. This Policy aims to ensure a co-ordinated approach to collections management.



3 POLICY APPROVAL AND REVIEW PROCESS

This policy was first approved by the M&S Company Archive Community Interest Company (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 LEGAL AND STATUTORY ENVIRONMENT

As the official business archive of Marks & Spencer plc, the M&S Archive has a responsibility to collect and preserve items relating to the history of M&S.

Records and information held in the Archive exist within the following statutory framework, which governs the use and re-use of material:

- Data Protection Act, 2018
- General Data Protection Regulation, 2018
- Copyright (where copyright does not belong to M&S) in accordance with the Copyright, Designs and Patents Act 1988

Institutional policies may also affect access and usage rights of information held in the Archive, particularly where material is commercially sensitive or highly confidential.

As a Community Interest Company, the M&S Archive also has a stated responsibility to engage the wider community with the Archive.



5 BUILDING AND STORAGE

Formal written terms of occupancy exist for the Michael Marks Building, which houses the M&S Archive collection. The building ensures a physically secure environment for the storage of the collection in an environmentally controlled repository as well as an exhibition space, a Reading Room and Seminar Room for hosting visitors and researchers, and staff areas. Visitor facilities are outlined in full in the Access Policy.

5.1 Building

5.1.1 M&S areas of the Michael Marks Building are leased from the University of Leeds on a 25-year lease. The M&S areas of the building are as follows:

- Exhibition, Reading Room and Seminar Room (ground floor)
- Visitor welfare facilities (ground floor)
- Staff office and staff room (ground floor)
- Repository (first floor)

5.1.2 The Michael Marks Building is shared and jointly used by the M&S Archive and the University of Leeds Library Service. An agreement is in place for the shared use of joint access areas: corridors, lift, fire escape routes and loading bay.

5.1.3 Building and maintenance work and the monitoring/ inspection of plant and building equipment for the M&S areas of the building are carried out by M&S Property and M&S Facilities respectively.

5.1.4 A formal inspection and review schedule is in place for repository integrity testing, which includes the fire suppression system.

5.1.5 An M&S Facilities contractor conducts a visual checklist of the repository on a weekly basis with any concerns or abnormalities being immediately reported to the Head of Archive and then the University of Leeds.

5.2 Storage

5.2.1 An annual storage review is carried out to determine the rate at which the Archive is accruing new material. This informs decisions about whether any reconfigurations of shelving are needed in the repository (e.g., if more shelves need to be converted to garment hanging space). A rolling programme of focused collection audits (detailed in the Collection Development Policy, section 7.5) also aims to make the best use of storage space.

5.2.2 A secure, digital preservation environment (Preservica Enterprise Cloud Edition) ensures the integrity of digital material held by the Archive. Access is limited to Archive staff and the cloud-based system is routinely backed up.

6 COLLECTION MANAGEMENT CONTEXT

6.1 Establishment of M&S Archive

The M&S Archive was established in 1983, when M&S appointed a Company Archivist to bring together historic records which were scattered across numerous Head Office (now Support Centre) departments with the purpose of supporting centenary celebrations as the business marked its 100th anniversary in 1984. Since then, material has continued to be accumulated both from within the company and from members of the public.

6.2 Relocation of the collection

Originally located in the former M&S Head Office at Baker Street, the business archive soon outgrew its surroundings and was transferred to storage in a distribution centre. In the mid-1990s the collection was again relocated, to fallow footage above the company's Wood Green store in north London. Having no environmental controls, fire protection or public access, these premises were far from ideal.

The M&S Archive collection was relocated from London to Leeds in 2011. To prepare for the move, an extensive collection and documentation audit was undertaken between 2009 and 2011. The audit, which highlighted areas of strength and weakness within the collection, has been used to inform collections management activities since the purpose-built repository opened in the Michael Marks Building on the University of Leeds Western Campus in 2012.

6.3 Use of the collection

As outlined in the M&S Archive mission statement, the M&S Archive is a vital business asset existing to preserve, document and make available the history of Marks & Spencer. The collection is actively used by the business to inspire new product, develop current thinking and inform business strategy, as well as to evidence and celebrate the Company's corporate heritage.

The M&S Archive also has a commitment to engage the public and communities externally of the Company. Almost the entire collection is

open to public researchers and can be accessed using the Reading Room service available at the Archive, or the digital access service, and the archive exhibition, which shares the heritage of M&S at the M&S Archive in Leeds. An enquiry service facilitates remote access to the Archive for both internal and external users, as does an Online Catalogue and Digital Archive, which can be used to explore items in the collection.



7 COLLECTION MANAGEMENT ACTIVITIES

7.1 Collection Development

Collection development activities, outlined in full in the Collection Development Policy, aim to ensure that the records in the M&S Archive accurately reflect the development of M&S as a national and international business from 1884 to today. Collection Development activities also ensure the effective management of transfers and deposits to the Archive, and consistency in dealing with internal and external depositors to the collection.

Following the Archive's investment in a Preservica digital preservation solution in 2020, the Archive has the capacity to deal effectively with digital transfers.

7.2 Collection Information

Collection information activities, outlined in full in the Collection Information Policy, aim to support the efficient management of the collection and assist in decision-making processes relating to the documentation of the collection. Collection information activities also aim

to promote access to the collection and support its discoverability via the Archive's Online Catalogue, available at <https://archive.marksandspencer.com/collection/archive-catalogue/>

Secure online portals for internal M&S colleagues [*url withheld from online policy*] and external researchers (msheritage.access.preservica.com/) provide access to digitised and born-digital archive assets held within our Preservica digital preservation solution.

7.3 Collection Care and Conservation

Collection care and conservation activities, outlined in full in the Collection Care and Conservation Policy, aim to ensure that the M&S Archive collection is cared for and conserved in accordance with national and international standards of best practice. Collection care and conservation activities ensure that the collection remains available to support the business needs of the Company and the needs of the Archive's communities. The Archive's commitment to collection care and conservation applies equally to physical archive material and born-digital and digitised archive assets.

7.4 Collection Access

Collection access, outlined in full in the Access Policy, ensures that the M&S Archive collection is available to the Company and to the public, to inspire learning and inform research for both internal and external users. Collection access activities also aim to ensure that the collection is open to communities and the wider public. Digital access facilities introduced during the Covid-19 pandemic in 2020 and 2021 have been maintained, to provide the fullest possible accessibility.

8 KEY COLLECTION MANAGEMENT ACTIVITIES: SCENARIOS

The following scenarios represent key collection management activities and demonstrate the co-ordinated approach of the suite of collection management policies outlined in section 7.

8.1 Transfer of records and product from Head Office

The transfer of records and current, or new, product from Support Centres keeps the Archive collection up to date. Material transferred internally will generally be very recent but will still be condition checked before being added to the collection. The following actions are taken:

Action	Policy to refer to
1. Maintain contacts within Support Centres to ensure the transfer of relevant material	Collection Development
2. Upon enquiry re. transfer: Check CALM for duplicates/ similar material and assess item for historic/ research value	Collection Development
3. Upon arrival at Archive (physical): Condition check	Collection Care and Conservation
4. Upon arrival at Archive (digital): Condition check	Digital Preservation
5. Accession item/s (physical)	Collection Information
6. Accession item/s (digital)	Collection Information Digital Preservation
7. Put item/s away in repository and record location	Collection Information Digital Preservation
8. Catalogue item/s (physical and digital)	Collection Information
9. Public consultation in Reading Room/ internal use/digital access	Collection Access

8.2 Public donation

The M&S Archive welcomes donations from members of the public and former staff, in line with the Collection Development Policy. When an offer of donation is made in person, by phone or by email, the following actions are taken:

Action	Policy to refer to
1. Check CALM for duplicates/ similar material and assess item for historic/ research value	Collection Development
2. Accept/ decline item	Collection Development
3. Upon arrival at Archive (physical): Condition check	Collection Care and Conservation
4. Upon arrival at Archive (digital): Condition check	Digital Preservation
5. Accession item (physical)	Collection Information
6. Accession item (digital)	Collection Information Digital Preservation
7. Package item	Collection Care and Conservation
8. Put item/s away in repository and record location	Collection Information Digital Preservation
9. Catalogue item	Collection Information
10. Consultation in Reading Room/digital access	Collection Access

8.3 Focused collection audit – Garment Audit

A rolling programme of collection audits informs the direction of future collecting. An audit of garments has been ongoing for several years, category by category. This involves condition checking each catalogued garment and ensuring that all catalogue entries are complete. Any duplicate garments, or items in poor condition, will be deaccessioned. For each item, the following actions are taken:

Action	Policy to refer to
1. Condition check	Collection Care and Conservation
2. Check for duplicates in series	Collection Development
3. De-accession item if necessary	Collection Development
4. Check, and if necessary, amend catalogue description	Collection Information
5. Repackage item	Collection Care and Conservation
6. Put item/s away in repository and record location	Collection Information

8.4 Onsite Access – External Researchers

The M&S Archive facilitates onsite access to the collection via a Reading Room service. The Archive also provides a Digital Reading Room service, giving access to digital surrogates wherever possible, subject to the researcher completing a copyright undertaking and subject to data governance and copyright restrictions. Once a researcher has booked an appointment and requested material to view, or submitted a request for digital surrogates, the following actions are taken:

Action	Policy to refer to
1. Check access status of requested items	Collection Access
2. Retrieve item/s from location in repository	Collection Information
3. Condition check	Collection Care and Conservation
4. Consultation of item/s in Reading Room	Collection Access
5. Process any reprographics requests	Collection Care and Conservation Collection Access
6. Put item/s away in repository	Collection Information

