



# Pensions Archive Trust Collection Policy

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## **VISION**

**Our Vision is, by means of a Pensions Archive developed through our partnership with London Metropolitan Archives and prospectively through similar links with other record repositories in the United Kingdom, to ensure the permanent preservation of material documenting the history, management and development of occupational pensions in the United Kingdom for the use and benefit of present and future generations.**

## **POLICY**

### **1. Origins and introduction**

Following discussions by a group of concerned pensions' professionals that began in late 2002, The Pensions Archive Trust (PAT) was constituted in August 2005 as a registered company, limited by guarantee. In 2006 a partnership for the provision of archival services, including the employment of a project archivist, to be funded by PAT, was agreed with the London Metropolitan Archives (LMA). A Joint Liaison Committee representing both PAT and LMA was also established to discuss and plan programmes for the Pensions Archive and set and monitor the work of the archivist. From April 2007, the Trust began acquiring archival collections at LMA. The Pensions Archive was formally launched in February 2008. From February 2008, the Trust has been granted charitable status under registered number 1122633.

The Pensions Archive therefore operates through PAT's partnership with LMA, and prospectively, in conjunction with LMA, through relationships formed with other record repositories, with which material acquired by PAT can be deposited in PAT's name. At LMA, being the principal repository, there is also maintained a specialist library of pensions printed material. In addition, PAT seeks to establish links with, and an accessible register of, other institutions such as civic archives and corporate archives which hold pensions-related material in their collections. This document sets out PAT's overall policy for collecting material for its own archives and for providing a central link to material held by other institutions.

The Pensions Archive Trust Collections Policy exists in tandem with the collections policies of LMA and any future partners and may therefore on occasion have to be modified to accord with their respective particular requirements.

### **2. Objectives**

- (a) To acquire by gift, deposit or purchase collections of original records (in all formats including electronic records), relating to the history, management and development of occupational and personal pensions in the United Kingdom.

- (b) To maintain, at LMA, a select specialist library relating to the history, management and development of occupational and personal pensions in the United Kingdom.
- (c) To establish, in conjunction with LMA, links to, and to work with, other institutions holding pensions archives, including civic archives, corporate archives and other record repositories, to promote and develop the study of the history of the development of occupational and personal pensions and to ensure that newly-acquired archives are directed to the most appropriate repository.
- (d) To ensure that all the pensions collections entrusted to our care are catalogued and stored to the relevant national and international standards, and that they are made available in original or surrogate form for the benefit of everyone.
- (e) To present the collections through a comprehensive electronic catalogue, and to make selected sources available in digital format.
- (f) To develop the service for users of the pensions collections in appropriate ways including, but not limited to, the compilation, editing and publishing of (a) catalogues of collections, (b) information leaflets and (c) guides to contents and the use of the collections; the mounting of exhibitions and displays of selected material; the use of any special facilities available at individual repositories.

### **3. Collecting Policy: Archives**

- (a) To acquire by gift, deposit or purchase original records relating to the history, management and development of occupational and personal pensions in the United Kingdom, particularly those of:
  - Non-Governmental organisations connected with pensions management, oversight, development and advice;
  - Individual pension schemes;
  - Key people involved in pensions management or research;
  - Pensions' conferences and events.
- (b) To acquire by gift, deposit or purchase audio visual materials including film, video and audio in analogue and digital formats, relating to pensions.
- (c) To acquire copies and transcripts only where the originals are not available; artefacts are not usually acquired. Both categories are only acquired if the copies or artefacts further our aims.
- (d) To evaluate and select material worthy of permanent preservation, in agreement with owners and depositors. Rejected material will be returned, or destroyed in a confidential manner, as the donor or depositor prefers.
- (e) To acquire only those records that are archival and not to acquire records that are current or semi-current. Given the current economic situation in which relatively-fresh

records may be put 'at risk' due to company closures etc, PAT does not put a specific minimum age requirement on potential acquisitions but would address such acquisitions on a case-by-case basis, also taking account of the requirements of the relevant repository.

- (f) To acquire material which will remain closed for a significant period of time only if it is immediately at risk and worthy of permanent preservation. Such material is typically bulky and often semi-current. For reasons of confidentiality and access, it is recommended that depositors retain such material until the closure period has expired. At this point, we shall evaluate and select material worthy of permanent preservation in conjunction with the relevant repository.

#### 4. Collecting Policy: Printed material

- (a) Pensions-related printed material is offered to the PAT or acquired directly from organisations (such as National Association of Pension Funds) or individuals, or is found within archival collections. LMA also receive some pensions' magazines on a regular basis either from publishers, or passed on by the City Business Library (CBL).
- (b) Printed material usually relates to one or more of the following themes:
- Pensions industry research/ers (including analyses, reports, statistics);
  - Individual schemes;
  - Pensions advice;
  - Social history research/ers.
- (c) We **DO** collect:
- Key reference material (ie you cannot make sense of the archives without it).
  - Designated pensions magazines/serial publications
  - Main publications of important organisations
  - Statistics/analyses/reports of significance
  - Schemes literature
  - History of pension provision
  - Social history directly relevant to pension provision
- (d) We **DO NOT** collect:
- Duplicates of material already held elsewhere within the PAT resource
  - Duplicates of material in publicly accessible libraries
  - International material
  - HMSO and other Government publications
  - Copies/transcripts unless the originals are not available elsewhere

All of the above are overridden by the need to keep "key reference material".

## **5. Deposit agreements**

PAT makes agreements as appropriate with donors/depositors covering the material to be acquired by the archive. Such agreements are not seen or preserved by the relevant record repository.

Archives and printed material acquired by PAT to form part of the Pensions Archive and Library are then deposited by PAT with LMA or other record repository subject to forms of agreement determined with the institution concerned.