

# **Collections Documentation Policy**

## **MonLife Heritage Museums 2024-2029**

Abergavenny Museum, Caldicot Castle,  
Chepstow Museum,  
Shire Hall Museum, Monmouth (*formerly Monmouth  
Museum / Nelson Museum and Local History Centre,  
Monmouth*)

**Date which this policy was approved by governing body:**

**Date at which this policy is due for review: January 2029**

## 1. Introduction

Documentation underpins every aspect of museum activity. Recording collection information is central to being accountable for the collections, their accessibility, management, research, study and use.

Our policy for the documentation of the collections is to ensure that the information we hold relating to the collections is accurate, secure, reliable and accessible.

In our statement of purpose, we make the following commitments:

**The Management of all heritage assets within MonLife to enhance the vibrancy of Monmouthshire, deliver inspirational and inspiring experiences and promote a deeply rooted sense of place.**

- **Goal 1:** Contribute to the delivery of both the Council's key policy objectives and Welsh Government Priorities – including the Programme for Government, the Well Being of Future Generations Act, the Anti Racist Wales action plan and Curriculum for Wales, in order to deliver excellence at our sites, whilst including tackling social injustice, climate change and promoting our service for everyone.
- **Goal 2:** Build a future focused, resilient business model for MonLife heritage which is competitive and an exemplar of sustainability.
- **Goal 3:** Create county-wide engaging, quality, impressive and interconnected experiences which inspire passion, learning and exploration of collections, the built environment and the wider landscape, bringing our heritage to life.
- **Goal 4:** To engage a wide range of audiences, making the heritage physically and intellectually accessible for everyone, and for future generations.
- **Goal 5:** Ensure that, colleagues, volunteers and audiences are able to co-produce the future of MonLife Heritage ensuring that the stories which are presented, together with their significance, is understood by all and generates a real sense of pride and wellbeing.
- **Goal 6:** Build strong and lasting relationships with stakeholders and the communities in which our sites are based, to engender a shared responsibility for our heritage and develop a way to co-produce the presentation of this.

It is only possible to carry out these activities successfully if our documentation procedures are robust and up to date. Our aim is therefore to ensure that we have a fully documented Museum Collection that meets Spectrum Standards to at least a level required by the Accreditation Standard.

MonLife Heritage Museums is committed to creating and maintaining good quality information and accurate location information for collection items, which conforms to the Spectrum primary procedures as well as national and international standards, as far as possible.

We acknowledge that we have a documentation backlog. Our to reduce and remove the backlog is set out in a separate Documentation Plan. In the documentation plan the backlogs will be identified, prioritised and assigned targeted milestones that will be reviewed and updated on annual basis.

## **2. Aims and Objectives**

**2.1.** The aim of this Policy is to ensure that we fulfil our guardianship, stewardship and access responsibilities. Through implementation of this policy our objective is to:

- improve accountability for the collections;
- maintain at least minimum professional standards in documentation procedures and collection information and attain the very highest standards wherever possible;
- extend access to collection information;
- strengthen the security of the collections.

**2.2.** We take a common-sense approach as to the level to which we document material. Ideally for the majority of the collections, especially those that have a high significance, monetary or scientific value, our collections staff will document to individual item level. However, for certain collections, such as bulk archaeological excavation material, it is neither feasible nor practical to document the material in this detail, and we will document items at group level. We therefore aim to have a basic 'inventory' record for all groups within the collection,

Our overall aim is that where items are catalogued individually, they will be documented to a more detailed 'catalogue' level.

'Inventory Level' and 'Catalogue Level' are identified within the Collections Trust's Spectrum 5.1 Cataloguing Standard. A summary of their definitions and the use of the different levels within MonLife Heritage Museums is provided below:

### **3. Definitions**

We will document our collections to either Inventory or Catalogue level, as described below:

#### **3.1 Inventory level:**

This includes the basic information to be accountable for the objects in our care in order for items to be individually identified and verified. All large bulk groups of accessioned items, loans inward and outward, and any other unaccessioned objects as appropriate will be documented at this level.

#### **3.2 Catalogue level**

This is the ongoing process of recording and managing information about collections often from multiple perspectives to meet the needs of a range of users. All accessioned items will be documented at this level.

Catalogue Information will include identifying details as well as any additional information known about the object now or in the future. This could include:

- records on the history of the item,
- associated information relating to its maker, previous owners, significance,
- any related published information,
- information that arises from different uses and sources
- information about its condition
- any specific concerns relating to its care or use.

It is recognised that objects usually have more than one story. Individuals and groups contributing to collections information will bring different knowledge and perspectives.

Our approach to cataloguing will be inclusive. Where appropriate we will consult on the needs of different stakeholders and use this to inform our approach to cataloguing.

We will review past practices and historic terminology that may now be considered to be incorrect, harmful or offensive, recording changes so that past practises are not erased.

## **4. Accountability**

### **4.1. Definition of accountability**

The Museums and Galleries Commission defined the essence of accountability as follows:

*"to enable museums to fulfil their fundamental responsibilities for collections and the information associated with them. The principles are that a museum should know at any time exactly for what it is legally responsible (this includes loans as well as permanent collections), and where each item is located."*  
(MGC 1993)

**4.2** We will ensure that the collection management databases are the primary tools for creating and managing collections information and items for which the museum is legally responsible.

**4.3** Many of our existing records are paper-based. In order to improve access and accountability, we will enter all new records onto computerised databases. Over time and in a phased programme, we will convert our older paper records to a computerised format, ensuring also that copies are kept in a safe separate location.

## **5. Accessibility**

MonLife Heritage Museums is committed to providing access to collections information and collections physically and digitally for our community of users in accordance with our Care and Conservation Policy.

Access, appreciation and understanding of the collections is provided through exhibitions and displays, learning and engagement programmes and through content on our social media channels and collections website [www.monlifecollections.co.uk](http://www.monlifecollections.co.uk)

## **6. Controlled access to sensitive information**

Museum staff have a duty of care to protect sensitive or confidential collections information in accordance with legal regulations.

All public requests for information will be considered in terms of compliance with the Freedom of Information Act (2000) and Data Protection Act (2018) and the Environmental Information Regulation (2004). We will review requests for information, especially confidential data such as donor information, environmental information, valuations or site details on a case by case basis, and in accordance with the applicable legislation and any legal agreements or conditions of gift.

## **7. Security against loss of irreplaceable collection information**

We have in place measures to ensure the physical security and long-term preservation of all documentation records, whether paper or computerised. We will update all manual and computerised records as appropriate. Regular backups will be made to secure digital data. Where collection information is manually held or computerised we will make backup copies of all key files every 5 years, and where considered appropriate, house them securely off-site.

## **8. Training**

All staff and volunteers responsible for creating and managing collections information will receive the appropriate training and document collections in accordance with individual sites Documentation Procedural Manuals.