



Documentation Policy

Version number: 1.0
Date: October 2025

Document Information and Approvals

Policy title: Documentation Policy

Review frequency: 4 Years

Review due date: September 2029

Service owner: Venues & Community Commercial Services

Corporate Plan Theme: Effective Council

Document Approvals

Each revision requires the following approvals:

- Non-administrative updates: Strategic Leadership Team / Community and Wellbeing Committee.
- Administrative updates: Curator

| | Title | Date Approved | Signature |
|---------------------------|---|---------------|----------------------|
| Head of Service | Interim Assistant head of Venue & Community commercial Services | | <i>HoS signature</i> |
| Strategic Leadership Team | Strategic Leadership Team | | <i>CEX signature</i> |
| Committee | Community and Wellbeing | | N/A |

Revision History

| Version No. | Revision Date | Revisor | Previous Version | Description of Revision |
|-------------|---------------|---------|------------------|-------------------------|
| | | | | |

Impact Assessment and Consideration

| Assessment Type | Required / Not Required | Date Completed | Impact Assessments and Considerations Comment | Completed By |
|-----------------|-------------------------|----------------|---|--------------|
| Finance | Not required | | | |
| Legal | Required | | | |

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|-----------------------------------|--------------|--|--|--|
| Equality Impact Assessment | Not Required | | | |
| Counter-fraud | Not required | | | |
| Health and safety | Not required | | | |
| Data Protection Impact Assessment | Not required | | | |
| Climate Change | Not required | | | |

1. Purpose and Access Statement

- 1.1. 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.
- 1.2. 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.

2. Scope

- 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

Many of our existing records are on a computer database with more in-depth information in another space. To improve access and accountability, we will transfer this data and enter all new records into the MODES Complete database. This is SPECTRUM compliant and will have an accessible public interface.

- 2.2 We will document to individual item level. We therefore aim to have a basic 'inventory' record for all identified items and groups within the collection. This includes sufficient key information to allow any object(s) in our care to be individually identified and verified. All accessioned items, loans inward and outward, and any other un-accessioned objects as appropriate are documented at this level.

3. Responsibilities

3.1 Definition of accountability

The essence of accountability is defined 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."

3.2 Controlled Access to sensitive information

All requests for information will be considered in terms of compliance with the Freedom of Information Act and Data Protection Act.

3.3 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. Backups will be made to secure digital data. Where collection information is wholly computerised and managed centrally, we will make backup copies of all key files, and where considered appropriate, house them securely off-site.

3. Commitment to Access

- 4.1 The museum is part of Epsom and Ewell Borough Council, and reports to the Community and Wellbeing Committee.