



Appendix 4 – Interim Collections Documentation Policy 2025-2027

Name of museum: The Wilson Art Gallery and Museum (hereafter referred to as 'The Wilson')

Management and Governing body: The Cheltenham Trust (hereafter referred to as the 'governing body' or 'TCT') The collections are managed on behalf of Cheltenham Borough Council (CBC) by The Cheltenham Trust (TCT) in line with national standards and as part of a Service Level Agreement.

Collection Custodian: Cheltenham Borough Council (hereafter referred to as the 'custodian' or 'CBC') The Wilson collections are public collections for which the council is the legal custodian and has the ultimate responsibility to approve deaccessioning recommendations proposed by the TCT.

Date policy approved by governing body: April 2025

Policy review procedure: Policy to be reviewed by The Wilson staff

Date policy due for review: 2027

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 documentation of the collections is to ensure that the information we hold relating to the collections is accurate, secure, reliable, accessible, and up to date. To achieve this, we will follow the Spectrum Standards published by the Museums Association.

Throughout 2025 and 2026 The Wilson is reinterpreting and redisplaying its museum collections galleries as part of the National Lottery Heritage Funded 'Cheltenham's BIG Museum Project'. This project includes a year-long public consultation which will form our understanding of the communities we serve and the objects and stories they connect with. Once the museum collections galleries reopen, the Wilson's Collections Development Policy will be reviewed and developed using the data collected from Cheltenham's BIG Museum Project.

2. Terms used and definitions

Name of Museum: The Wilson Art Gallery and Museum (shortened to 'The Wilson')

The Wilson is governed by The Cheltenham Trust. The collections held at The Wilson are owned by Cheltenham Borough Council (the 'Council') and are on loan to The Cheltenham Trust.

3. Aims and Objectives

The aim of this Policy is to ensure that The Wilson fulfils its 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.

Through doing this, the Policy will ultimately help The Wilson to achieve its core purpose, which is currently defined as follows:

The Wilson aims to be a regional centre of excellence for all ages. It is friendly and curious in everything that it does and provides creative space for people to engage with Cheltenham's stories through exhibitions, displays, art, crafts and events. We do this by caring for and interpreting our outstanding collections to support discovery, enjoyment and learning for all.

4. Accountability

The Wilson will follow the accountability principles defined by the Museums and Galleries Commission:

"to enable museums to fulfill 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)

5. Levels of Documentation

The Wilson is committed to record significant information about the objects in its care so that each object it is legally responsible for (including loans as well as permanent collections) can be identified and located. Adding and expanding digital records to Axiell is the number one priority in The Wilson's five-year period and will be the priority for documentation and collections staff.

Individual Object Level

For most collections, The Wilson will document at an individual item level, e.g. each painting, piece of furniture, or print.

5.1. Exceptions to be documented in groups

For some specific collections it is neither feasible, practical nor a priority to document the material to this level of detail. These collections, or parts of collections, are:

- **Archaeology:** Bulk excavated material such as pot, bone, slag, building materials, flint (Small finds, whole pots, carved stone, mosaic, and all published pieces will continue to be catalogued to an individual item level.)
- **Shells:** Boxes of same or similar specimens
- **Eggs:** Nests or boxes of same or similar specimens
- **Photograph albums:** Whilst each album will be documented, the contents of albums will not be documented at an individual object level in this 5 year period, though it is an aspiration for the future
- **Sketch books:** Whilst each sketch book will be documented, the contents of sketch books will not be documented at an individual object level in this 5 year period, though it is an aspiration for the future



The Wilson will document these collections to a group level e.g. “One box of Samian pottery from trench 3 west side of St James Station site” or “Photograph Album by E T Wilson, 1880 to 1893, showing images of family at Westal, holidays in Ireland, and Ted at Cambridge”.

5.2. Inventory or catalogue level documentation

The Wilson will document all our collections to either inventory or catalogue level:

- **Inventory level:** This includes enough key information to allow any object(s) in The Wilson’s care to be individually identified and verified. All accessioned items and loans inward and outward, including objects for temporary exhibitions will be documented to this level.
- **Catalogue level:** We will work in line with the ‘Rethinking Cataloguing’¹ practice highlighted by Collections Trust² to continually add to and improve our cataloguing level of details. Such documentation will include the known history of an object including the source and method of acquisition. It will also include rights information, if known. An image (photographed or scanned or in some cases drawn) will be attached to each object record. Detailed description of the object including condition will be included.

To achieve inventory and/or catalogue level documentation The Wilson will use the following Spectrum standard methods:

- Entry documentation
- Movement records
- Inventories
- Accession registers
- Manual catalogue cards
- Computerised listing and cataloguing
- Conservation records
- Insurance valuation records
- Exit records
- Loans in paperwork
- Loans out paperwork

6. Security

6.1. Hard copy records security

The Wilson will keep the hard copy records according to Spectrum security standards e.g. accessions registers in locked fireproof safes, other records in locked rooms, or cupboards with limited access.

6.2. Digital copies security

¹ ‘Rethinking Cataloguing’ is a Collections Trust project which focuses on challenging the historic ‘gatekeeper’ mentality that is holding back a more open and inclusive approach to opening up collections and information.

² Collections Trust is a registered charity which helps museums work with the information that connects audiences and collections. Its standards and advice are used around the world to make museum collections accessible.



The Wilson has complete digital backup copies of all its registers and are stored on our archive drive on the computer system. The digital backup will run in tandem to the hard copy register ensuring that it is up to date at the end of each quarter. The archive drive folder is locked to all but specific, named staff. The server is backed up by ICT daily.

6.3. Collections database security

The internal computerised database system (see 7 below) is also only available to specific, named staff. This is backed up daily and the backups kept for two weeks.

6.4. Insurance valuations security

Insurance valuations are kept in secure, locked folders on the computer drives that only selected Collections staff have access to. No valuations are kept on the Collections Management System.

For related and more detailed information see:

- Emergency Plan
- Collections Documentation Plan
- Collections Development Policy

7. Computerised Records

7.1. Collections Management System

The Wilson uses the Collections Management System, Adlib, owned and administered by Axiell. The current version is 6.1. In 2025 we will upgrade to the new Axiell version.

7.2. Team members

Currently 3 members of the permanent Collections Team and one volunteer are trained to input records. We will be training staff and volunteers to input records once the new system has been launched.

7.3. Number of records

25,049 records are on the database (over 5,000 viewable on the website) with more being added all the time. This represents approximately 25% of the c.250,000 items in The Wilson's collections.

7.4. Aims

The Wilson aims to:

- Enter all material being newly added to the collections onto Axiell
- Work through existing inventories to add collections/objects not currently on Axiell to an inventory level
- Continue to recruit and train volunteers to help with the task of inputting, noting that we are currently updating volunteer roles to work towards the aims of this plan
- Include documentation and digitisation in funding bids for projects
- Consider adding larger tranches of objects to inventory level via an excel inventory upload



- Extend the use of the Collections Management System to include copyright information; loans; and to add labels, published information sheets etc, so all information is captured in one place, and for all team members to be able to access it
- Ensure that the online catalogue, which is the 'front-end' of Axiell, is up-to-date and available for public and researcher access via The Wilson's website

7.5. Technological advances

In order to ensure that our current electronic system does not become obsolete, The Wilson will remain informed of technological advances and ensure the long-term accessibility of the information held. One person will have overall responsibility for documentation advances. The Cheltenham Trust has a Service Level Agreement with Publica for Information Technology support that underpins support for these advances to ensure we retain safe, secure, and efficient services.

For related and more detailed information, see:

- Collections Documentation plan
- Rights policy and plan
- Publica Service Level Agreement

8. Controlled Access to Sensitive Information

8.1. Requests for information

All requests for information will be considered in terms of compliance with the Freedom of Information Act (2000) and General Data Protection Regulation (GDPR) (2018), Data Protection Act (2018) and the Environmental Information Regulation (2004).

8.2. Confidential data

The Wilson will review requests for confidential data (such as donor information, environmental information, valuations, or site details) in consultation with Cheltenham Borough Council who own the collections. We will take each request on a case-by-case basis, and in accordance with GDPR guidance and the applicable legislation and any legal agreements or conditions of gift.