

Phase 2 At-a-Glance: Organizing & Labeling

What You're Doing: Sorting remaining boxes of records into 3 main categories (Active, Retention, Archival) and labeling them clearly so others know what's inside and where it came from.

What You Need:

- Retention Schedule for Parishes and Schools
- Sticky notes or temporary labels (for "Review Later")
- Permanent markers or adhesive file/box labels
- Labeling template or example sheet (optional)
- Basic supplies: folders, boxes, tape

Who Can Help:

- Staff or volunteers who are organized and detail-oriented
- Anyone familiar with office layout or record locations
- Archives team for questions about historical or permanent records

Tips for Success:

- Use the 3-category concept:
 - **Active:** Needed frequently for operations (keep nearby)
 - **Retention:** Not used daily but must be kept (label with destruction date)
 - **Archival:** Permanent records (clearly label for long-term preservation)
- Label clearly so others can find things without opening every box
- Include parish name in every label for clarity
- Take photos of boxes or screenshots of digital folders for reference

Box Label Must-Haves:

- Originating parish
- Date range
- Record type/function (e.g., "Finance - Budgets")
- Destruction date (if known) or note "Archives" if permanent

What Not to Do:

- Use post-its (unless securely taped)
- Write on box lids (they're easy to swap)
- Label boxes with unclear names like "Misc" or "Father's Stuff"
- Mix records from different parishes within the same box