

Phase 4 At-a-Glance: Tracking Records (Box Inventory)

What You're Doing: Creating a simple inventory that lists what boxes of records exist, where they came from, and where they are stored. This makes retrieval, litigation, and future planning easier.

What to Track:

- Title or description (e.g., "Finance – Budget Reports")
- Originating parish
- Date range (e.g., 2015–2020)
- Storage location (room, shelf, offsite)
- Notes (e.g., "Shred 2028," "Contains contracts," "Permanent – Archives")

What You Need:

- Spreadsheet program (Excel or Google Sheets)
- Inventory template or sample
- List of labeled boxes/folders from Phase 2
- Access to storage locations
- Retention Schedule (to confirm destruction dates)

Who Can Help:

- Staff or volunteers who are detail-oriented
- Anyone comfortable with spreadsheets or organizing data

Tips for Success:

- Start with the boxes already packed and labeled
- Walk through each storage area to confirm contents and locations
- Include all archival and long-retention materials
- Review annually or during staff transitions
- See Sample Inventory (next page)

What Not to Do:

- Skip the inventory step because it seems time-consuming
- Forget to update when records move or new records are stored
- Keep the only copy on one person's desktop

Sample Inventory: Use this example for setting up your inventory spreadsheet. It includes records from multiple parishes, stored in different locations, with retention/archival notes to guide future needs.

Box Title	Originating Parish	Date Range	Location	Notes
Parish Council Meetings	St. Gertrude	1963–1980	St. Hedwig Archives, shelf 1	Permanent
Fr. W. P. Smith correspondence	St. Gertrude	1981–1995	St. Hedwig Archives, shelf 2	Permanent
Payroll - ADP yearend summaries	St. Gertrude	1995–2007	St. Hedwig Archives, shelf 3	Permanent
Accounting – AP/AR	St. Hildegarde	FY22/23	Offsite - Iron Mountain	Shred 2035
Accounting – AP/AR	St. Hildegarde	FY23/24	Offsite - Iron Mountain	Shred 2034
Accounting – AP/AR	St. Hildegarde	FY24/25	St. Hedwig Bookkeeper's Office	Shred 2033
Parish Annual Reports	St. Isidore	1922–1962	St. Hedwig Archives, shelf 4	Permanent
Insurance Records	St. Isidore	1930s–1990s	St. Hedwig Archives, shelf 5	Permanent
HR - Volunteer Files	St. Isidore	1980s–1990s	St. Hedwig Archives, shelf 6	Permanent