



Phase 1: Cleaning out ROT

What you're doing

Disposing of old records that don't need to be kept anymore according to Records Retention Schedules. This includes **Redundant, Outdated, and Trivial records, known as ROT.**

Quick decision guide:

- Is it obviously ROT? If so, dispose immediately.
- Are you unsure? If so, flag it with a sticky note and move on.
- Could it be historical/legal/personnel material? Ask Archives for assistance.
- Note: Sacramental registers and marriage packets are permanent archival records. The Archdiocesan Archives accepts registers 100 years old or older. All newer registers must be retained onsite by the parish.

A good pace is 2-3 boxes per hour. Going slower can be a sign of being overly cautious, while going faster requires double-checking that you aren't missing anything important.

What you'll need:

- Retention schedules (found here: [Parish Archives and Records Management](#))
- Sticky notes for "Review Later" boxes
- Shred bins and recycling containers
- [Records Destruction Form](#)
- Archives contact information for any questions

Understanding retention schedules

• How to read them:

Each schedule shows a trigger (when to start counting) and length (how long to keep).

- Example: Vendor invoices = FY+6. If your fiscal year ends June 30, 2027 keep those invoices until June 30, 2033, then destroy.

• How to apply them:

Apply retention rules to whole boxes, not individual folders or documents. If a box has mixed records, use the longest retention period. Use the newest date in the box and apply the retention period to the entire box.

- **Dispose of transitory materials immediately.** No schedule check needed for:
 - Office administration materials (e.g. draft documents [retain only final versions]; reminders, and schedules; extra copies saved for convenience).
 - Communications materials (e.g. personal communications; expired reservations and confirmations).
 - Reference materials (e.g. outside organization flyers/brochures; temporary forms already entered into databases; duplicate electronic and paper copies of one document).

Tips for success

- Check schedules for unfamiliar record types.
- Document item destruction.
- Keep one complete set of things, discarding duplicates.
- Don't get stuck in one difficult box. Flag it and come back later.
- When in doubt, email [Archives](#) staff.



Phase 2: Organizing & Labeling

What you're doing

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

What you'll need:

- Retention Schedule for Parishes and Schools
- Sticky notes or temporary labels (for "Review Later")
- Permanent markers or adhesive file/box labels
- 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
- Department / Function: The office and specific record type (e.g., FINANCE – Budgets).
- Date Range / Fiscal Year: (e.g., 2020-2025 or FY25/26).
- Box Number: A sequential number assigned after sorting by parish and department (e.g., Box 14).
- Disposition Status: The scheduled Destruction Date (if known) or a permanent notation of "ARCHIVES".
- Confidentiality flag if the box contains sensitive data (HR, personnel, or safeguarding).

What not to do:

- Use post-it not (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.



Phase 3: Storing Records

What you're doing

Choosing the best storage location(s) for records based on how often they're needed and how long they must be kept.

Who can help:

- Office and facilities staff who know the space and building setup.
- Pastor or PAA (if final location decisions are needed).

What you'll need:

- Boxes that are sorted and labeled (from Phase 2)
- Access to potential storage spaces
- Basic knowledge of what makes a good storage environment (see SCADS checklist below)
- Locking cabinets or closets for sensitive/confidential records.
- Fireproof file cabinets or safes (minimum 1-hour fire protection rating) for sacramental registers and marriage packets.
- Note: The Archdiocesan Archives accepts registers 100 years old or older. All newer registers must be retained onsite by the parish.

Use the SCADS Checklist. A good records storage area is:

- **S**ecure: Limited access for trusted staff only
- **C**lean: Free from pests, food, and heavy dust
- **A**ccessible: Labeled, organized, and easy to retrieve from
- **D**ry: Away from water, bathrooms, kitchens, and off the floor
- **S**table: Avoids big fluctuations in temperature and humidity (ideally 60-70°F and consistent humidity)

Storage options:

- Original parish site
 - Records stay at their originating church.
 - Allows easy local access but increases the risk of inconsistent tracking.
- Centralized at one location
 - All records from every originating parish are consolidated into one primary location if church property is sold.

- Simplifies long-term management but requires dedicated space and oversight.
- Commercial offsite storage
 - Records are moved to a secure, climate-controlled commercial repository.
 - Maximizes preservation and security but reduces daily accessibility and involves ongoing fees.
- Hybrid approach
 - Active files stay close, others go to off-site storage

Tips for success

- Avoid basements, attics, or sheds for archival materials
- Elevate boxes on pallets or shelves
- Store confidential records in locked areas
- Avoid putting records near anything with plumbing



Phase 4: 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'll need:

- Spreadsheet program (Excel or Google Sheets)
- Example Inventory at end of this tipsheet
- 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

Example 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 year-end summaries	St. Gertrude	1995-2007	St. Hedwig Archives, shelf 3	Permanent
Accounting – AP/AR	St. Hildegarde	FY 22/23	Offsite – Iron Mountain	Shred 2035
Accounting – AP/AR	St. Hildegarde	FY 23/24	Offsite – Iron Mountain	Shred 2034
Accounting – AP/AR	St. Hildegarde	FY 24/25	St. Hedwig Bookkeepers 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