**RECORDS INVENTORY AND APPRAISAL FORM**

**AGENCY OF ADMINISTRATION**
DEPARTMENT OF BUILDINGS & GENERAL SERVICES
PUBLIC RECORDS DIVISION
US ROUTE 2, MIDDLESEX
DRAWER 33
MONTPELIER, VT 05633-7601
(802) 828-3700  FAX (802) 828-3710

**PART I INVENTORY**

2. RECORD SERIES TITLE:  

3. CONTENT:*  

PURPOSE/USE:*  

*PLEASE BE VERY DETAILED, USE ANOTHER SHEET FOR ADDITIONAL SPACE

4. INCLUSIVE DATES  
FROM:  
TO:  

5. DIMENSION:  
☐ LEGAL SIZE  ☐ CARDS  
☐ LETTER SIZE  ☐ OTHER  

6. PRESENT VOLUME (BOXES)  

7. ANNUAL ACCUMULATION (BOXES)  

8. ARRANGEMENT OF RECORD SERIES:  
☐ ALPHABETICAL  
☐ GEOGRAPHICAL  ☐ CHRONOLOGICAL  ☐ NUMERICAL  
BY:  

9. PHYSICAL LOCATION OF RECORDS (street number, building name/number, floor, city)

10. ESTIMATED ACTIVITY PER FILE DRAWER  
CURRENT YEAR:  ☐ HIGH  ☐ MEDIUM  ☐ LOW  
2ND YEAR:  ☐ HIGH  ☐ MEDIUM  ☐ LOW  
YEAR ACTIVITY BECOMES LOW:  

11. CAN THE SAME INFORMATION BE FOUND ELSEWHERE? IF YES, PLEASE EXPLAIN.

**PART II APPRAISAL**

12. VALUE:  
☐ ADMINISTRATIVE  ☐ LEGAL  ☐ FISCAL  ☐ ARCHIVAL  

13. RETENTION PERIOD IS:  
YEARS,  ☐ IF MICROFILMED  
☐ IF AUDITED:  ☐ STATE? ☐ FEDERAL?  

14. REASON FOR DISPOSITION RECOMMENDED:  

15. ELIGIBLE FOR TRANSFER TO RECORDS CENTER  
☐ YES  ☐ NO  AFTER:  YEARS  

16. STATUTORY RETENTION YEARS:  STATUTE #:  

17. DISPOSITION ORDER NUMBER:  

18. IS MATERIAL CONFIDENTIAL OR RESTRICTED?  
☐ YES*  ☐ NO  
☐ SHRED  
BY DEPT. REG.= #:  
BY STATUTE #:  

*PLEASE ENCLOSE A COPY OF REGS OR STATUTE

SIGNATURE OF PERSON PREPARING REPORT  

TELEPHONE  DATE

SIGNATURE OF RECORDS OFFICER  

TELEPHONE  DATE
INSTRUCTIONS FOR COMPLETING INVENTORY & APPRAISAL FORM

1.) AGENCY CONTACT INFORMATION – self explanatory

2.) RECORDS SERIES TITLE - enter the name of the records series. This title should be as accurate and descriptive as possible because all future reference to the records will be by that name.

3.) DESCRIPTION OF RECORD SERIES - enter a detailed description of the Records Series. This is the most important part of the inventory. From this information the Public Records Division and the Advisory Board can review and approve records disposition without misinterpretation or error. Description should include details of content, purpose, and use.

4.) INCLUSIVE DATES - indicate the inclusive (beginning and ending) dates (by month and year only) of the Record Series. If continuing series, indicate.

5.) DIMENSION - indicate the dimensions of the records.

6.) VOLUME - enter the total volume of the record series. Use cubic feet and estimate as closely as possible. One letter size drawer contains 1.5 cubic feet, one legal drawer contains 2.0 cubic feet. Each standard record box contains 1 cubic foot.

7.) ANNUAL ACCUMULATION - enter in cubic feet the growth of the Record Series during the last completed calendar year.

8.) ARRANGEMENT - indicate by placing "X" in the appropriate block, also fill in "by" line; ie, alphabetical by client name; chronological by month, year; numerical by case number, etc.

9.) LOCATION OF RECORDS - identify the location of the records by building, floor, and room designation, if possible.

10.) ESTIMATED ACTIVITY - enter rate of reference to record series per file drawer for current year and second year. Use the response high, medium or low. State the year activity is considered "low".

11.) CAN THE SAME INFORMATION BE FOUND ELSEWHERE? IF YES, PLEASE EXPLAIN - advise if other copies of this information are available anywhere else.

12.) VALUES - respond according to known values.

13.) RETENTION PERIOD - respond in accordance with established value by stating number of years and conditions, if any, for retaining the records. The retention period may range from a short period of time, for many records, to permanent preservation for others. If records are be microfilmed or scanned, check the appropriate box and complete the "Reformat Project Description" form.

14.) REASONS FOR DISPOSITION AS RECOMMENDED - the recommended disposition must be justified by indicating why the information contained in the record will not be required after the minimum retention period proposed. Statements of "need space", "records have no value", "records not needed", are not acceptable. Acceptable justifications indicate why the records will not have sufficient value to warrant further retention.

15.) ELIGIBLE FOR TRANSFER TO RECORD CENTER - records should be kept in office areas only as long as they are referred to on a regular basis.

16.) STATUTORY RETENTION - Federal or State requirements. Enter number of years required by State or Federal statute and the statute number if applicable. Include a copy of applicable statutes with form.

17.) DISPOSITION ORDER NUMBER - indicate the previous Disposition Order governing records, if one was previously issued for this Record Series.

18.) CONFIDENTIAL OR RESTRICTED - Include a copy of agency policy or the statute which justifies confidential or restricted classification. Indicate if material is to be destroyed by shredding, or if bonded confidential recycling will be sufficient.