

CHURCH INVENTORY

PHYSICAL ITEMS INSTRUCTIONS

1. Access a ready-made inventory form from the internet or create your own form. At the top of your inventory form include your organization's name, line for both sheet number and location name. Print enough copies of the form to use in each room of your church and affix to a clipboard.

2. Distinguish the difference between supplies and equipment, noting dollar amount that quantifies the distinction. Example: Items with a cost under \$400 each are considered supplies whereas items with a cost over \$400 each are considered equipment. Because of its value, equipment should be inventoried while it's unnecessary to inventory supplies.

3. Create labels with a sequential list of serial numbers using the same program you use for your mailing labels, etc. and print numbers, one each, onto 1 inch labels. The first time you do your inventory serial numbers should be in year-month-unique number format. The unique number is the one that will change sequentially, for example: 2012-11-1, 2012-11-2, 2012-11-3.

4. Start in one room and identify all the items that count as equipment. Once identified, attach one serial number to the bottom of each item so that items can be tracked.

5. Write down the sheet number and the room using the inventory forms on the clipboard. Each item that was given a serial number, record data into all fields present on the inventory form.

The description field should have an overview of the item. The serial field should have the number you affixed to the bottom of the item. When you start your initial inventory, the date acquired and initial value may not be available, but if it is complete the form. If it is not, write the current date into the date date-acquired field and estimate the value. If an item is needed, check in the "Needed or Keep" field. If it's being discontinued or disposed, note the date of disposal.

6. Repeat these steps above from room to room until all rooms are completed, but remember to note the sheet number and the name of the room at the top of each inventory sheet as your change locations.

7. Get 2 three-ring binders. Make a copy of each completed form, and place one copy each in sequential order by sheet number into a three-ring binder. Place one binder (master copy) at a secure, offsite location (safety deposit box) and the other (copy of master) onsite in an administrative office. Follow inventory procedures at least once a year according to your church policies.

8. Tips:

- Transferring physical inventory sheet data into a database or digital spreadsheet provides a third point of safekeeping.
- Adding new items to inventory as they come in will ensure that their acquisition date and initial value are properly recorded.
- Only allow one organized designee to be in charge of inventory to prevent any confusion or double-entry.