

Records Policy

PURPOSE: The purpose of this policy is to protect the Land Trust's assets (properties and conservation easements) from legal challenges, natural disasters and to meet federal, state, and local requirements. This policy establishes the requirements for creating, retaining, and destroying Land Trust records.

POLICY:

The Land Trust maintains complete and secure records to meet its conservation mission and to ensure adherence to sound and legal business practices. In the event of litigation, the Land Trust's ability to provide records with documented authenticity is critical to its success.

This policy ensures that records are retained and stored in a consistent and organized manner to achieve the following goals:

- Protect Land Trust assets
- Ensure compliance with donor intentions
- Document and sustain conservation values of protected lands
- Ensure Land Trust records are readily accessible and retrievable
- Uphold the public trust and maintain the Land Trust's non-profit status
- Operate an efficient organization.
- Ensure against catastrophic loss, e.g., natural disaster, fire and flood.

To ensure responsible records management WCLT will:

1. **Use consistent and logical methods** to create, store and destroy Land Trust documents.
2. **Retain originals and copies of irreplaceable documents** in separate locations. A list of the Land Trust's irreplaceable and essential documents are listed in Procedure 2.2.A, Creating Records, Figure 1 Critical Documents Matrix.
3. **Store irreplaceable original records in a secure location** to protect them from daily use and the risk of fire, floods, and other damage.
4. **Develop a document retention schedule** to ensure documents are retained per legal and best practice requirements before they are destroyed.
5. **Prevent the destruction of records involved in litigation** or in anticipated legal action until the matter has been resolved.
6. **Review this Records Policy every five years** to ensure compliance with current requirements and to ensure the policy continues to serve the best interests of the Land Trust.
7. **Direct the Executive Director to develop procedural documents** to implement this Records Policy, identifying how documents are created, filed, stored, and destroyed.

Approved: December 7, 2009

President, Board of Directors