 

**Land Trust Recordkeeping**

**A Self-Help Toolkit**

Sound recordkeeping is essential to land trusts’ ability to effectively steward their property interests, to maintain public trust and to prevail in legal challenges when conserved lands are compromised. Practice 9G of *Land Trust Standards and Practices* emphasizes best practices for recordkeeping:

1. Adopt a written records policy that governs how and when organization and transaction records are created, collected, retained, stored and destroyed

2. Keep originals of all documents essential to the defense of each real property transaction in a secure manner and protected from damage or loss

3. Create and keep copies of these documents in a manner such that both originals and copies are not destroyed in a single calamity

This toolkit contains the following resources that land trusts of any size can use to implement sound recordkeeping practices. Visit the Land Trust Alliance’s Learning Center for additional helpful resources, including an online course about practice element9G1: [Adopting Recordkeeping Policies](https://tlc.lta.org/topclass/searchCatalog.do?catId=173821):

1. **Background Narrative to Practice 9G1**General guidelines, including the “how’s” and “why’s” of creating a records policy.
2. **Background Narrative to Practice 9G2**
Introduction to types of files to be saved. Includes tips on digital and paper storage.
3. **Background Narrative to Practice 9G3**Guidelines on which documents to duplicate, and how to ensure that originals and copies are not destroyed in a single calamity.
4. **Practice 9G1 – Sample 1 Records Policy** - PDF
5. **Practice 9G1 – Sample 2 Records Policy -** PDF
6. **Sample 3 Records Policy** – Word document
7. **Template Cover Sheet - Easement Property**A checklist/cover sheet created by consultant Holly Lippert to evaluate and track the state of records for each easement property.
8. **Template Cover Sheet - Fee Property**A checklist/cover sheet created by consultant Holly Lippert to evaluate and track the state of records for each fee property.
9. **Practical Pointers: Recordkeeping—Purging Conservation Easement Files**Points to consider when deciding which documents to keep.
10. **Practical Pointers: Recordkeeping Risk Assessment**Guidelines on assessing risk and identifying records to retain.
11. **“Tales of Records, Redundancy and Renewal”**An article from the Alliance’s *Saving Land* magazine, providing an overview of recordkeeping for land trusts of all size.
12. **File Audit for Land and Stewardship Records**An adaptable spreadsheet to review the records in your land and stewardship files. [Download by clicking here](http://s3.amazonaws.com/landtrustalliance.org/LandTrustStandardsandPractices-2017-Stewardship-File-Audit.xlsx) or find at <https://www.landtrustalliance.org/topics/land-trust-standards-and-practices>.

*The Land Trust Alliance and the Massachusetts Land Trust Coalition created this toolkit as part of the statewide Massachusetts Record Keeping Initiative, which is made possible by the generous support of the Fields Pond Foundation, the Fieldstone Foundation and other generous supporters.*