

BY Kendall Slee

# TALES OF RECORDS, REDUNDANCY AND RENEWAL



How three land trusts took on their filing cabinets and won

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**IN THE DAILY BUSTLE OF CONSERVATION WORK**, it can be easy to put off a recordkeeping overhaul. Here's how three organizations surmounted the challenge of improving their recordkeeping systems in the midst of their everyday duties. For one, the first step was getting records out of board members' attics and garages and deciding on the best duplication system. For another, the process led to implementing a new recordkeeping network and tracking system. All share a commitment to improving their records not just for helping their offices run more smoothly, but also to protect their conservation work for future generations.

## Do It Right from the Start

When Bonnie Barnes was hired as North Florida Land Trust's first full-time executive director in 2007, one of the first things she did was attend the Land Trust Alliance's Southeast regional conference. There, she heard firsthand how Hurricane Katrina had wiped out conservation records and backup records of the Land Trust for the Mississippi Coastal Plain. It definitely got her thinking about her own land trust's records stashed away in board members' garages and attics, and thinking about how to protect them.

"I recognized what I needed to do, and have been working toward that goal ever since," she says. "The advice I kept getting everywhere I went was that it is easier to do when we are small and don't have a lot in the house to get in order."

In January 2011, a donor provided office space, which presented the perfect opportunity to bring in the records from board members' homes and sort through them.

Barnes hired interns from three area colleges and a recent college graduate to help review files for completeness, comparing their contents to the list of irreplaceable and essential documents found in the Accreditation Commission's *Guidance Document on Practice 9G of Land Trust Standards and Practices*.

As a nonprofit, the land trust was able to purchase Adobe Acrobat Professional software at a deep discount from TechSoup.org. Using the software, the interns helped scan and convert important records into PDFs, Adobe's Portable Document Format that can be easily read on any computer through download of the free Adobe Reader.



BONNIE BARNES

North Florida Land Trust hired interns from local colleges to help with record sorting. From left to right, Robert Fleming (University of South Florida), Catherine Mashburn (Florida Coastal School of Law), and Kerry Iler (University of North Florida) have a little fun.

Barnes, with a background in information technology and communications, set up an on-site computer backup system with mirroring hard drives, and she also uploads scanned documents to an online storage folder provided by the land trust's email service.

Over the summer of 2011, the interns and volunteers sorted through paper files under Barnes' supervision. "It took three months to get through all the files that were in storage, filling 12 large trash bags with shredded papers. We had copies of checks, credit card numbers, many things that just shouldn't be kept in files," Barnes says. "But we also found treasured documents...old newsletters, articles, properties

that had been researched years ago that we realized we're still working to conserve."

As the land trust's sole staff person, "there are constant struggles and interruptions," Barnes says. But that has not deterred her from seeking land trust accreditation and raising the standards of her organization's recordkeeping system. (The land trust filed its pre-application for accreditation in August 2011 and planned to file its complete application in November 2011.)

The goal was to do it all right from the start," Barnes says. "You can't do anything unless you've got good recordkeeping. You just feel like you're spinning your wheels."

“Having a clear and consistent recordkeeping system has cut down on staff time for records retrieval, and yielded confidence in the face of potential future challenges.”

#### Take a Fresh Look

When the New Jersey Conservation Foundation’s staff sat down in early 2010 to hash out what records to keep and what to purge, the conversation had an oddly personal edge. “It goes into people’s psyches: Are you a packrat or a clean desk person? It was really interesting and hard at a fundamental level,” recalls Chris Jage, South Jersey assistant director, about the recordkeeping conversation.

The time had come for the 50-year-old land trust to rethink its recordkeeping situation. Filing cabinets were bulging the walls of the organization’s headquarters in a historic house in Far Hills, New Jersey. For staff like Jage working in one of the foundation’s five remote offices around the state, accessing such records as contracts and management agreements meant asking for them to be sent overnight express, or making a trek to headquarters to retrieve the documents firsthand.

The foundation also lacked a standard way to name files and projects, and recordkeeping protocols varied somewhat among the staff. The land trust had a recordkeeping policy, but it needed a more specific, standardized checklist for project records. The staff developed a “project information form” and database with a comprehensive list of records—from acquisition, to development and stewardship. (They keep original, primary records off site in secure storage.) Staff throughout the state can access the information on the secure computer network the foundation already had in place.

And the question of what records to keep and what to purge? The organization decided to get rid of multiple iterations of maps and surveys developed during some land protection projects, but it held on to documents that show the course of negotiations for a fee title purchase or conservation easement. “Based on our experience of having to litigate a variety of different projects, the intention ‘between the lines’ is subjective unless you have other documents to show the history of acquisition,” Jage says.

With a new system settled, three staff members led the effort to convert some 400-plus project files to the digital system.



Sometimes a nice long table helps. New Jersey Conservation Foundation’s Chris Jage (standing) and Lauren Malay, a volunteer for NJCF, sort records.

SANDY STUART PERRY

“The most challenging aspect is trying to do this while still doing land conservation at the pace and professionalism that we’re used to,” Jage says. “It’s a huge task. It’s taken a lot to get us to say ‘OK we have to take time out of our schedule, not talk on the phone, and get this done and get it done right.’”

The staff set a year-long timeline, with the goal of going through 25% of the files every two months. After reviewing the material, they sent the files to a document duplication service to be scanned and converted to PDFs.

The office network, including the electronic records, are backed up daily on a set of two rotating drives, one of which is always off site. At the end of the day, the IT specialist backs up the system and takes one of the drives off site (a place known only to the land trust) and returns the next day with the alternate drive. In effect, there is always a backup off site from the previous business day.

Already, the record system is ensuring more consistent documentation that is easier to find. Jage recalls a weekend the stewardship director spent searching files for documents pertaining to a court subpoena. Now those files are readily accessible, searchable by keywords.

“By taking on a project like this we’re moving the organization to the next level,” Jage says. “In retrospect it was challenging. But this was the only logical thing to do. It helped us realize we’re not just going through files, we’re making the organization better.”

#### Are We Being Repetitive? Good!

There’s nothing wrong with being redundant. In fact, with key records, redundancy is required.

That’s why the Monadnock Conservancy in New Hampshire has three full sets of records—a working copy that staff can access, an archived set of original signed documents kept



Stewardship Manager Emily Hague and Stewardship Assistant Rick Brackett demonstrate how they used to feel about recordkeeping. But since the Monadnock Conservancy created a clear and consistent recordkeeping system, “Filing this year’s round of correspondence was much better,” laughs Hague.

in fire-retardant cabinets, and an electronic copy of scanned PDFs of originals transferred daily to a secure offsite information management company. In addition, the 65 volunteers who monitor more than 175 conservation easements for the land trust can check out separate “field notebooks” of conservation easement baseline and monitoring reports. (The other records are only accessible to the staff.)

Monadnock Conservancy’s records weren’t always so redundant and so well organized. The land trust started a records inventory in 2007 as it prepared to apply for accreditation through the Land Trust Accreditation Commission. “We knew that we would need to know what records we had and what records were missing,” says Stewardship Manager Emily Hague. “We were able to get a sense of what types of stewardship records we had kept over time, so it was very helpful. At that time the organization was 20 years old and we had about 100 land transaction files.”

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As staff and interns combed through the files, they found some inconsistencies in the types of documents retained, and saw the need to create detailed guidelines that could be applied to every transaction. They also found a few documents missing, including eight easement baseline reports. “For those properties, we basically started from scratch and created a ‘current conditions’ report (field work and all),” Hague explains. “We figured it was pointless to backfill and guess what was present at the time of donation, so we generated baselines that were current and had current owners sign them. In a couple of cases, those owners were not the original grantors, so we had to educate them about what we were doing. Everyone was understanding and we were able to get all eight baselines updated.”

Staff also discovered a few photographs and maps were missing from signed baseline reports. They evaluated case-by-case whether to replace those, Hague says.

The land trust held off purging any records at the time of their initial file review, and opted to spend more time gathering information about what to keep and what to shred. After consulting with an attorney for guidance on its record retention practices, as well as other land trusts in the state and the Accreditation Commission, “we finally had enough confidence to go through our files in 2010 and do a comprehensive cleanout, and standardize the file structure,” Hague says.

Among the items the Monadnock Conservancy culls from files are easement drafts with clerical, non-substantive changes marked; general correspondence not related to the specific project, such as model language discussion or an explanation of the organizational process; and project managers’ interim (not final) checklists, notes about contacts or non-substantive easement terms. (To view the Monadnock Conservancy’s stewardship recordkeeping policy and culling list, go to [www.lta.org/savingland](http://www.lta.org/savingland).)

“Having a clear and consistent recordkeeping system has cut down on staff time for records retrieval, and yielded confidence in the face of potential future challenges,” says Hague. “We now have 189 conserved properties, and we’ve gotten them all in order according to our new standard. It’s already made our lives so much easier!”

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