

**Stowe Land Trust  
Records Policy Update  
January 11, 2013**

**Objectives**

1. Develop land records management procedures
2. Improve record retention schedule
3. Update for compliance with accreditation renewal expectations
4. Attorney review of policy for litigation purposes

**Next Steps**

- Create list of conserved land records and describe process for managing each
- Update records retention schedule
- Review both with attorney
- Draft italicized portions of outline below
- Review conservation easement and fee owned property records management procedures with Stewardship Committee
- Present draft policy to Executive Committee
- Board adoption of updated policy

**Proposed Policy Outline**

- Purpose
- *Document Storage- summarize*
  - a) Digital Document Back Up System
  - b) *Paper Records – describe safe and filing cabinet*
- *Critical Records- summarize*
  - a) Membership Database
  - b) Financial Records
  - c) Fundraising Records
  - d) Outreach Records
  - e) Administrative and Personnel Records
  - f) *Conservation Easement Records – identify records and procedure for management*
  - g) *Fee Owned Property Records – identify records and procedure for management*
- *Record Retention- summarize and make appendix*
- Disposal of Records
- *Access and Responsibility – add explanation of records custodian (Lands/Outreach – Assistant Director, Administrative/Finance/Fundraising/Membership – Office Manager, Personnel – Executive Director)*

\* Outline items in italics will either be new to the policy or already exists in the policy but will be reorganized under a new header.