




Keepers & Chuckers

Organizing Land Records to Assure Permanent Protection for Your Land

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KEEPERS & CHUCKERS




INSPIRATION

Be inspired to protect the great work of your land trust.



TOOLS

Learn about tools to help ensure success.



ACTION

Leave with a jump start on your records and steps to help you take action.

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GOOD RECORD MANAGEMENT

- LEGAL DEFENSE
- DAILY OPERATIONS
- HISTORIC RECORD
- LEGAL OBLIGATIONS
- PUBLIC REPUTATION

EXAMPLES OF RECORDS

- Legal Agreements
- Appraisals
- Financial Records
- Donor Acknowledgement
- Tax Documents
- BDRs/Management Plans
- Monitoring Reports
- Maps/Surveys



CRITICAL RECORDS

Irreplaceable Document	Original Required	Duplicate Required
Legal agreements, deeds, conservation easements, amendments, etc.	yes	yes
Critical correspondence (such as correspondence with the landowner related to project goals, tax and legal matters, notifications, approvals, enforcement, other key matters the organization determines essential to the defense of the transaction, etc.)	yes	yes
Baseline documentation reports for conservation easements	yes	yes
Title insurance policies or evidence of title investigation	yes	yes
Surveys, if any*	yes	yes*
Full appraisals for summary appraisals if full appraisals are not available) used to substantiate the purchase price or used by the landowner to substantiate the tax deduction	yes	no
Forms 8283 for projects where the landowner claimed a federal tax deduction (The organization's "original" can be a copy of the landowner's signed original)	yes	no
Conservation easement monitoring reports	yes	no
Fee property inspection records essential to the stewardship and defense of the property	yes	no
Contracts and leases relative to long-term land management activities (Original retained only for as long as it and applicable statute of limitations is in effect)	yes	no

RECORDS STORAGE

EXAMPLES?

- Fireproof cabinet/safe
- Separate location
- Electronic storage
- Make duplicates



RECORDS POLICY & PROCEDURES

PHILOSOPHY CREATION & COLLECTION RETENTION & STORAGE RESPONSIBILITY



- Organizing
- Location
- Permanent Protection
- Accessibility

RECORDS POLICY & PROCEDURES

PHILOSOPHY CREATION & COLLECTION RETENTION & STORAGE RESPONSIBILITY



- Designated staff/volunteers
- Create templates & procedures
- Clear assignments of responsibility

ADDITIONAL RESOURCES

- Land Trust Alliance Learning Center Standards and Practices Curriculum Guides
 - *Nonprofit Law and Recordkeeping, Volume II*
 - *Acquiring Land and Conservation Easements*
 - *Managing Conservation Easements in Perpetuity*
- IRS Publication 4221-PC



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