

## THE PRAIRIE ENTHUSIASTS RECORDS MANAGEMENT POLICY

### **THE PRAIRIE ENTHUSIASTS, INC. RECORDS MANAGEMENT POLICY**

Adopted 12/5/2023

The Prairie Enthusiasts (TPE) recognizes that maintaining consistent, complete, secure, and authentic records is essential to achieving our mission. Therefore, we have developed this policy to ensure we maintain records and files necessary to comply with the Land Trust Alliance's (LTA) Standards and Practices and any applicable law including the Sarbanes-Oxley Act.

TPE will store originals and copies of all essential documents in a manner which ensures they cannot be destroyed in the same event, such as fire, flood, or security breach. These original documents may be paper or electronic copies and will be handled in compliance with LTA guidance. Additionally, TPE will protect these record sets by limiting access to designated personnel to protect against accidental destruction or alteration. These essential records include organizational and financial records,<sup>1</sup> fundraising records,<sup>2</sup> personnel and employment records,<sup>3</sup> program records,<sup>4</sup> and land protection and stewardship records.<sup>5</sup> These documents will only be destroyed when permitted by any relevant statutes of limitation.

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<sup>1</sup> Organizational records include documentation of our tax-exempt status, articles of incorporation, TPE bylaws, minutes from Board of Directors meetings, Board member lists, and official policies. Financial records include budgets and financial reports, audit and tax documentation, and bank and investment statements.

<sup>2</sup> These include records of donations received and any donor restrictions.

<sup>3</sup> These include records relating to hiring, payroll, performance evaluation, and dismissal/termination.

<sup>4</sup> These include volunteer records, and records of services we provide such as prescribed burns.

<sup>5</sup> These include any documentation necessary to defend ownership of conservation easements or fee title property, not limited to deeds, appraisals and IRS 8283 forms. Additionally, they include records of due diligence and title searches, baseline reports, monitoring reports, and any correspondence or documentation relating to encroachments.