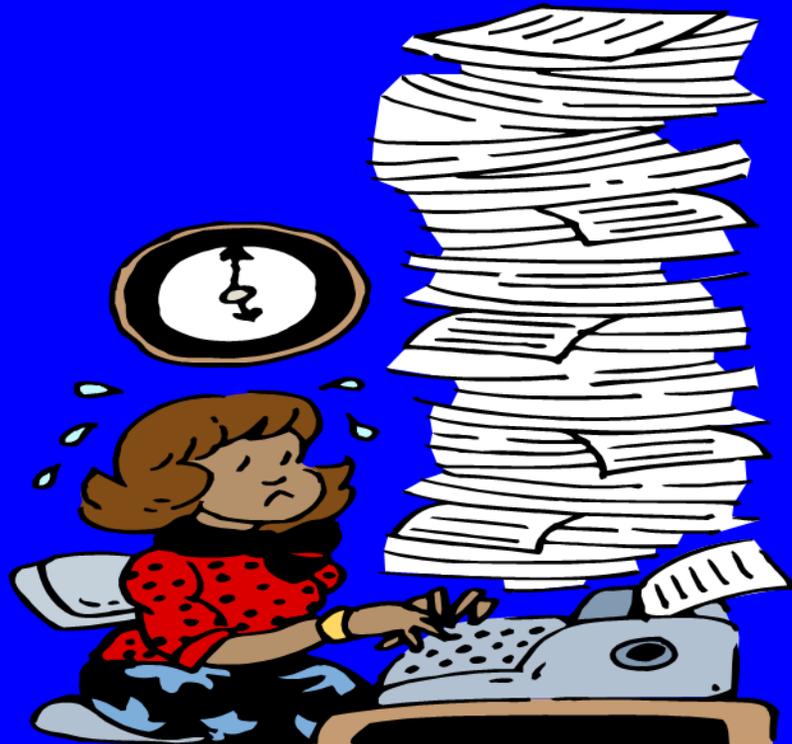


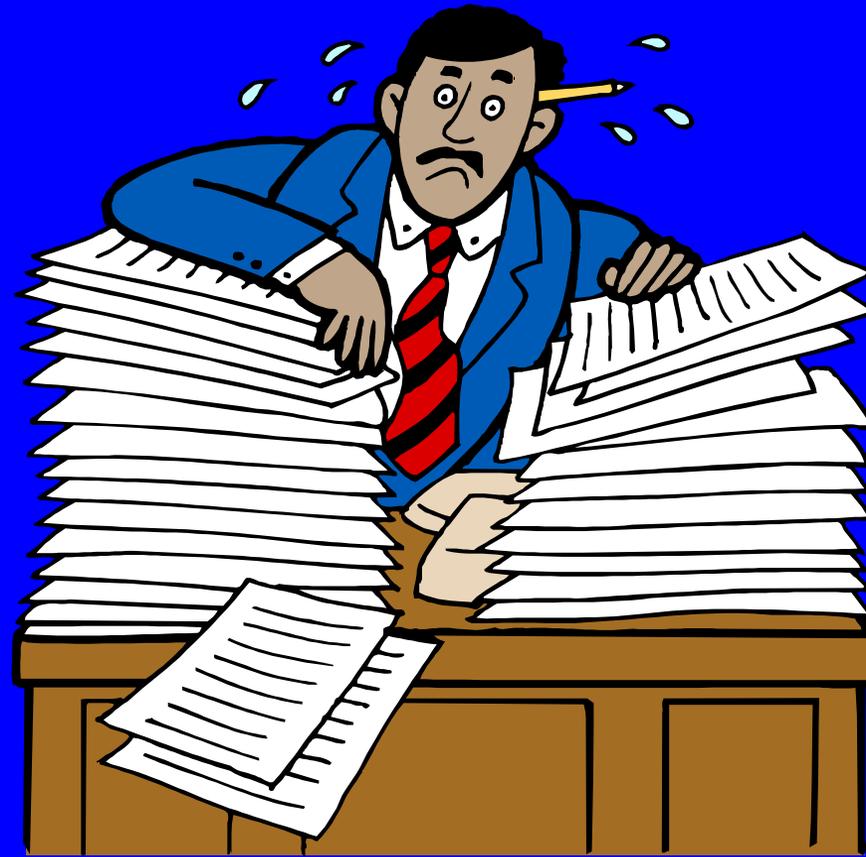
District Record Keeping, Archiving and Keeping an Organized office



2021 KACDE

By: Kimberly Bartley

ORGANIZATION



How organized are you??

- Can you find something within 5 minutes of being asked?
- How often do you file?
- Are your folders in the file cabinet labeled and current?
- Could someone come in behind you and find things easily?
- Can you find a bill or order form from last year?
- Do you archive?

If you answered yes to 4 or more you are doing pretty darn good!!!

Tips to a more organized office



- File at least every other week.
- Always have a “To Do” list.
- Get a small file sorter for your desk.
- Get a good calendar
- Keep good records
- Keep a filing system that is easy to follow.
- Keep a “to do” list

FILING SUGGESTIONS

- Fiscal Year, Calendar Year, By Subject – But please not all 3
- Accessibility & Location
- Good Folders – Legible Tabs
- Accordion Folders for Receipts OR filed by Vendor
- Binders for minutes and meeting information
- Be selective – don't keep every scrap of paper nor do you need 3 copies of everything



DISPOSAL OF RECORDS



KEEP INDEFINITELY

- ❖ Budgets
- ❖ Minutes of importance
- ❖ Annual Financial Reports
- ❖ Long Range Plans
- ❖ Annual Reports

- ❖ Formation Documents
- ❖ District original tax exempt status
- ❖ Any information of Historical Significance
- ❖ Original Aerial, flood and Topographic Maps
- ❖ Watershed Conservancy District Records

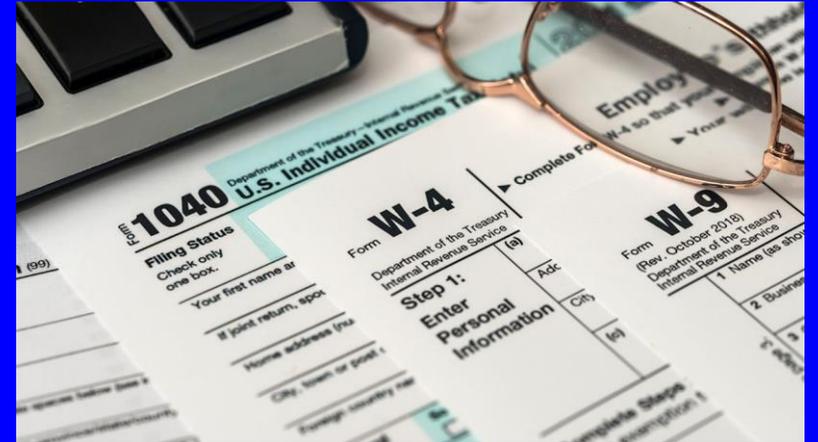
- ❖ Ag Districts
- ❖ Ag Water Quality Plans OR until replaced by a new one
- ❖ Certificates of Attendance
- ❖ Memorandum of Understanding
- ❖ Scrap Book Clippings/Pictures



Keep for 8 years



- Audits
 - Check Stubs
 - Bank Statements
 - Canceled Checks
 - Payroll
 - All Tax Documents
 - Contracts and Agreements (319, SCS & CAIP)
 - Personnel Records & Reviews (until obsolete)
- **Some of this information must be shredded or destroyed when disposed of



Keep for 5 Years

- Insurance Documents
- Educational Materials – Soil Stewardship, Art & Writing, Scholarship Applications
- Award Program and Grant Applications (Dead Animal & Direct Aid)



- District Owned Equipment Info. Or until obsolete
- Equipment Loans – 5 years past closing
- Personnel Applications
- Plan of Work – Discard when out of current Long Range Plan

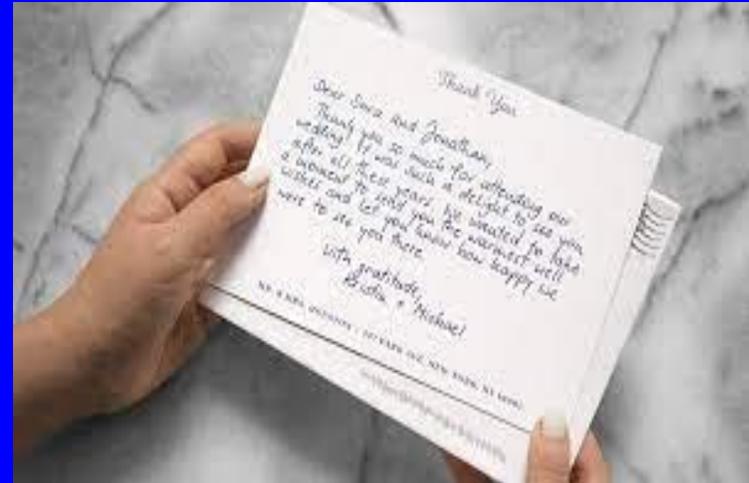
Keep For 3 Years:

- Treasurers Reports
- Awards Programs
- Time Sheets
- Landowner Lease & Rental Agreements



Keep For 2 Years

- Paid Bills & Receipts
- Newsletters
- Correspondence

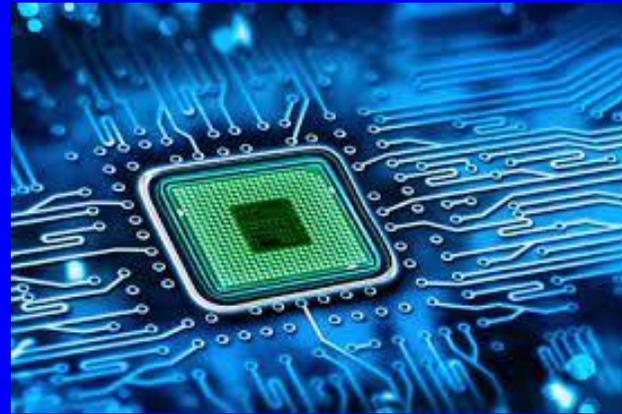


Landowner Files - What to keep and Combine

- Reconstitutions – FSA
- Sodbusters
- Engineering Plans
- SCS Contracts
- AWQP's
- Notes & Pictures
- Work with NRCS
- What to do with obsolete files



Electronic VS Paper

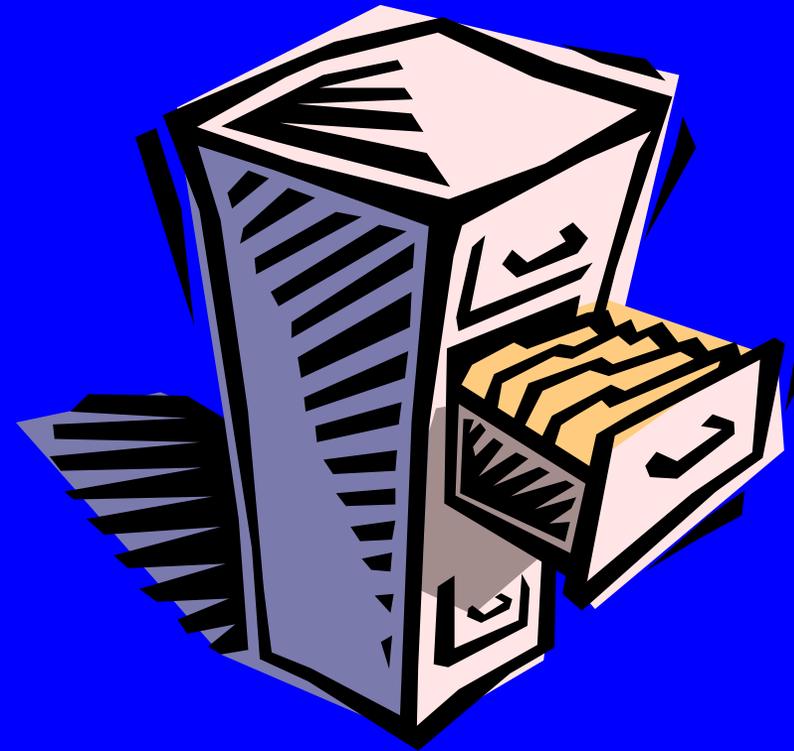


In this world of technology there is no longer a need to archive paper records.

- This is ONLY successful if you back everything up to an external location other than your computer
- DO NOT DEPEND ON USDA BACKUP
- You must do this from year to year and keep it organized
- You can even scan records from the past.
- Do whatever your District feels comfortable with.

Organizing Files

- Archive once a year – out of cabinet
- Shred and get rid of it
- Keep files grouped
- Keep no more than 2 fiscal years info in the cabinet at once.
- Label Everything
- Have no more than 1 file cabinet



WE ARE IMPORTANT



*I APPRECIATE
ALL THAT YOU DO!!!!*

