

Conservation District Filing System & Records Retention Guidance

- For individual Conservation District programs and projects, create a main heading and then subheadings.
- Keep a permanent file of all Conservation District official records such as organizational documents, election records, minutes, and other records deemed appropriate by Conservation District Supervisors.
- Materials should be arranged chronologically by names or numerically as appropriate. Example: File material within a folder by the most recent date in front.
- Requests for copies of files are subject to the Idaho Public Records Law and/or the Freedom of Information Act (FOIA). Requests for information have certain requirements and timelines that must be met. Before distributing, loaning, or copying information in Conservation Districts or Cooperator files, consult the Idaho Public Records Law or call the Idaho Soil Conservation Commission Management Assistant in Boise (208) 332-8650 for guidance. Before distributing, loaning, or copying information in USDA Natural Resource Conservation District files, consult the NRCS District Conservationist or the NRCS State Office for guidance.
- District Administrative Assistants typically are responsible for filing both Conservation District and NRCS material. Check with the District Conservationist for NRCS filing guidelines.
- Yearly screen for inactive folders for retention or disposition.

Conservation District Filing System & Record Retention Guidance

Main Heading	Sub Heading	Record Disposition or Retention
Administrative		
	<ul style="list-style-type: none"> • Annual Plans 	6 years
	<ul style="list-style-type: none"> • Annual Reports 	Permanent <i>(Archive old reports)</i>
	<ul style="list-style-type: none"> • Correspondence 	1 year
	Elections <ul style="list-style-type: none"> • Election Consolidation Manual • Certificate of Elections • Nominating Petitions • Oaths of Office • Tally Sheets • Record of Supervisors who have served the Conservation District 	Current Manual 4 years 4 years 4 years 4 years Permanent_____
	<ul style="list-style-type: none"> • Five-Year Resource Conservation Business 	6 years
	<ul style="list-style-type: none"> • Minutes 	Permanent <i>(Archive minutes after 2 years)</i>
	<ul style="list-style-type: none"> • Memorandums of Agreement • Memorandums of Understanding 	Current
	<ul style="list-style-type: none"> • Organization Information 	Permanent
Cartography		
	<ul style="list-style-type: none"> • District Maps 	Permanent
	<ul style="list-style-type: none"> • General Maps 	As long as pertinent
	<ul style="list-style-type: none"> • Project Maps 	As long as pertinent
Conservation Plans		
	<ul style="list-style-type: none"> • Land owner/operator (active) • Land owner/operator (inactive) 	Current Archive

Main Heading	Sub Heading	Record Disposition or Retention
Equipment		
	• Agreements	As long as in effect
	• Operations Brochures	Until equipment is discarded
	• Service Contracts	As long as in effect
	• User Contracts	2 years
Financial		
	• Accounts Payable	Current year
	• Accounts Receivable	Current year
	• Audits	Permanent
	• Bank Statements	7 years
	• Budget Requests	2 years
	• City Letter of Intent	No longer required
	• County Letter of Intent	No longer required
	• Financial Accountability Policies and Procedures	Current year
	• Funding received	5 years
	• Grants	10 years or as specified in grant
	• Project	10 years or as specified by funding entity.
	• QuickBooks	Permanent
Information & Education		
	• General Information	1 year
	• Conservation District Awards Received	Permanent
	• Contests	Current year
	• District Newsletter	Permanent (1 copy)
	• IASCD Awards Manual	Current
	• Photos (name, subject & date)	Permanent (Archive photos after 5 years)
	• Program Information	As long as pertinent
	• Soil Stewardship	Current year
	• Other	Current year
Insurance* *Master policies held by Idaho Soil Conservation Commission		
	• Bond*	Current fact sheet/information

Main Heading	Sub Heading	Record Disposition or Retention
Insurance * Continued 'Master policies held by Idaho Soil Conservation Commission		
	• Commercial Auto*	Current fact sheet/information
	• Commercial Liability*	Current fact sheet/information
	• Directors & Officers*	Current fact sheet/information
	• District Buildings	Current policy
	• District Owned Equipment	Current policy
	• Errors & Omissions*	Current fact sheet/information
	• Unemployment	Current information
	• Workman's Compensation	Current information
interagency		
	• Conservation Programs	Current information
	• Correspondence	1 year
	• IASCD	Current information
	• IASCD Auxiliary	Current information
	• IDEA	Current information
	• ISCC	Current information
	• NACD	Current information
	• NRCS	Current information
	• RC&D	Current information
Legislation		
	• Federal	Current
	• State	Current
Personnel <u>All Personnel Records Must be Secured</u>		
	• Personnel Policies	Current
	• Previous Personnel Policies	3 years after last change
	• Personnel Records	5 years after last day of employment
	• Recruitment Files	4 years
	• Retirement	Permanent
	• Training	5 years

Main Heading	Sub Heading	Record Disposition or Retention
Personnel <u>Files to be Seized and Secured from Personnel Files*</u>		
	• Disability	5 years after last day of employment
	• I-9S	3 years after last day of employment
	• Grievance	5 years after last day of employment
	• Medical	5 years after last day of employment
Project(s)		
	• Conservation District Project Agreement or Contract	10 years after contract expires
	• Project Final Report	Permanent
	• Participant Contracts	10 years after final payment
TMDL		
	• TMDL Plan	10 years
	• TMDL Implementation Plan (Aq & Grazing)	10 years after implementation
	• Sub basin Assessment	As long as pertinent
	• Other	As long as pertinent
Watershed		
	• Correspondence	1 year
	• Basin Advisory Group	1 year
	• Watershed Advisory Group	1 year
	• 303(d) List	Current list
	• Other	

Conservation District's Archive File Guidance

Main Heading	Sub Heading	Permanent Record Retention
Administrative		
	<ul style="list-style-type: none"> ● Annual Reports 	Permanent
	<ul style="list-style-type: none"> ● Record of Conservation District Supervisors who have served and term office 	Permanent
	<ul style="list-style-type: none"> ● Meeting Minutes 	Permanent
	<ul style="list-style-type: none"> ● Organization Information 	Permanent
Cartography	<ul style="list-style-type: none"> ● District Maps 	Permanent
Financial	<ul style="list-style-type: none"> ● QuickBooks 	Permanent
Information & Education	<ul style="list-style-type: none"> ● District Awards received 	Permanent
	<ul style="list-style-type: none"> ● Newsletter 	Permanent (1 copy)
	<ul style="list-style-type: none"> ● Photos 	Permanent (name, subject, date)
Personnel	<ul style="list-style-type: none"> ● Retirement Records 	Permanent