



Landcare Notes

Keeping records

You need to keep records for two important groups – you and the people who support your work.

Keeping records for your own use will help you plan future activities, monitor what you have been doing and keep a history for the group.

Those same records (plus any specific requirements they have) will show your community and supporters that you are meeting your obligations to them.

What record keeping is

Common types of records that are kept for a group include financial records (see Landcare Note 4.2: Keeping Financial Records), project management reports, research, correspondence, membership records, and meeting minutes.

Records will show the progress you are making, monitor your achievements and analyse your efficiencies as well as report, plan, budget, and evaluate. In many cases, records will show you are complying with various legal responsibilities.

Keeping good records can also be helpful when writing newsletters, displays and talks or on other occasions when you need to explain what you have been doing.

It is important to be prudent and thorough when you decide what you want to collect and record. The best records are simple but accurate and when you have a clear purpose in mind for what you will do with the information.

Records that must be kept

Any legislation covering taxation, incorporation (see Landcare Note 4.5: GST and ABN), occupational health and safety (see Landcare Note 7.5: Personal Safety), and chemical use

(see Landcare Note 7.4: Risk Management: Why Worry?) are records you are required to keep.

Such records become the basis of either reporting on your activities or verifying an activity or claim. It is important that you have a reliable filing system to keep track of your legal records.

The records associated with your group, as an incorporated entity, include all decisions made by your committee and the information you used in coming to that decision (see Landcare Notes: 1.5 Effective Meetings; 1.3 Committee Roles).

Records that should be kept

Membership records are one of the primary records kept by any Landcare group. Other important documents that record what your group is doing include, newsletters, articles, notice of events and other communications. These are all part of the group's day-to-day operations so you should keep a record of these documents on file. You will find these useful for grant applications, presentations, passing onto new committee members and building a history of your group.

Keep a copy of the following:

- Your events calendar and register of people attending events
- Insurance certificates, specific manuals, and training records should also be filed
- Contractual requirements governing what you are doing
- Specific project records including details on activities, results and expenditure.

These records are good examples of records that are used to report back to the funding body (see Landcare Notes: 5.3 Developing a Landcare Project; 5.1 Project Management).

You may also want to keep records that have come from monitoring programs your group is



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involved with such as Waterwatch or Frogwatch as they contribute to building a picture of your group's local area.

How to do it

For collecting data, log books, forms and work sheets are very useful, in paper and/or a form that can be stored electronically. An exercise book can be used to record and register events and who attended, and other details on working bee days and field days.

For storing information, you need to establish files with a simple, logical subject structure. They could be paper files kept or information kept on computer. However if you mainly use electronic files, make sure you have a back-up disk of some kind, or make paper copy just in case there are computer problems.

The subject structure for sorting and storing information is critical for keeping related bits of information together. This is important for when you are passing the information onto a new committee member. You will need a storage and cataloguing process that works for your group and is understood by more than one person. Perhaps take a moment to show another member in your group what your system is when the opportunity arises - just in case. Remember you will have holidays or may have to take a break for some reason so you may need to hand this over quickly.

Key tools

A camera is a very useful tool for the group that can be used for activities, to record works onsite, and take photos of the area that you are working in. Photos can be used for displays, newsletters, reports, websites and group brochures so a group camera would be a worthwhile investment in many ways.

Dating the correspondence and other documents that the group receives is good practice, and storing it in a central location.

Keeping your paperwork for the group in one place will help you to be organised for meetings and know where to find the information when you need it.

There are forms associated with occupational and health and chemical use (see Landcare Note 7.5: Personal Safety), that can help you keep a record of these requirements.

Many funding programs use templates to help with project applications and project reporting. These guides and templates can be useful in making sure your recording methods align with your reporting requirements.

Talk to other groups to find out how they keep their records, especially other Landcare groups.

Further references

Victorian Landcare Gateway:
www.landcarevic.org.au

Landcare coordinators in your region – contact your Catchment Management Authority.

Related Landcare Notes

This Landcare Note is one of a series. These notes provide an excellent guide for the ongoing operation of your group.

Landcare Note 1.3: Committee Roles

Landcare Note 1.5: Effective Meetings

Landcare Note 4.2: Keeping Financial Records

Landcare Note 4.5: GST and ABN

Landcare Note 5.1: Project Management

Landcare Note 5.3: Developing a Landcare Project

Landcare Note 7.4: Risk Management: Why Worry?

Landcare Note 7.5: Personal Safety



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Landcare Note 7.1

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