



**minute**  
Board & Staff  
Exercises

A tool to help your nonprofit start developing policies

# An introductory worksheet in how to develop a Data Backup Policy

## How does your organization backup data?

Information is one of your organization’s most valuable assets. Your organization is required by law to keep certain records. Records are important to document board decisions, how funds were raised, used and how program services were accomplished. But no matter how you store data, there is always risk that data could be lost. A loss of important data could be a serious setback for your organization, so it is wise to backup all important information.

How does your organization keep data? List each type of important information and how records are kept: Use an “O” for original records and a “B” for back-up records:

	Paper	Computer	Cloud	External Hard Drive
Financial Records				
Bank Statements				
Accounting Records				
Governing Documents				
Program Records				
Minutes of Meetings				

Now consider how improvements could be made:

	Paper	Computer	Cloud	External Hard Drive
Financial Records				
Bank Statements				
Accounting Records				
Governing Documents				
Program Records				
Minutes of Meetings				



**Disclaimer:** This information is not a substitute for competent legal and accounting advice rendered on your particular fact situation and planning goals. Laws and procedures change frequently and are subject to different interpretations.