

AGRICULTURE CONSERVATION EASEMENT PURCHASE PROGRAM
RECORDS RETENTION SCHEDULE

AE-1 Administrative and Subject Files

See **Administrative and Legal Records** found in Section 2 for retention guidance.

AE-2 Fiscal Records

Includes standard accounting and financial records relating to the funds of the Farmland Preservation Office.

See **Financial Records, Payroll Records** and **Purchasing Records** found in Section 2 for retention guidance.

AE-3 Easement Records

Includes application, program guidelines, ranking sheet, appraisal report, offer letter, survey, , title insurance commitment with all exceptions, Deed of Merger, Subordination Agreements or Satisfaction piece as necessary, Agreement of Sale with the following Exhibits:

- Exhibit A – Legal Description
- Exhibit B – Statement of Costs
- Exhibit C – Recorded Deed of Easement with Conservation Plan Agreement
- Exhibit D – Contractor Integrity Provisions
- Exhibit E – Nondiscrimination/Sexual Harassment Clause

Retain permanently for administrative, legal and historical purposes.

AE-4 Grant Records

Consists of grant application records, work papers, reports and other supporting material used to manage municipal grants.

Comply with retention requirements promulgated by the appropriate funding agency.

AE-5 Minutes of the Agriculture Preserve Board

Record of the Agriculture Preserve Board meeting including date, names of members present and absent, issues discussed, motions, reports and actions taken.

Retain permanently for administrative, legal and historical purposes.

AE-6 Inspection Reports

Includes inspection reports and related correspondence.

Retain official inspection report(s) permanently for administrative, legal and historical purposes. **Retain** all other records as long as of administrative value.

AE-7 Photographs

Photographs that document changes to property and structures.

Retain as long as of administrative and legal value; then **contact** State Archives regarding historical value

AE-8 Supporting Documentation – Administrative

Includes cover letter, signed Summary Report, maps including Topographic map, Location map, Tax map and labeled soils map with soils mapping units, Soils Report Form C, status sheet of higher ranked applicants, adjacent landowner notification letter and list, conservation plan including nutrient management plan, review sheets and related correspondence.

Retain as long as of administrative value.

AE-9 Supporting Documentation-Financial

Includes financial and post settlement records, W-9 forms, percentage of ownership letters, county certification of available funds and other financial records.

Retain as long as of administrative value.

Approved by PHMC County Records Committee on September 26, 2012