

## **Policy 9G: Recordkeeping**

Approved by the Board on May 9<sup>th</sup>, 2017

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Pursuant to its Records Policy (see 2D), the Upper Peninsula Land Conservancy keeps originals of all irreplaceable documents essential to the defense of each transaction (such as legal agreements, monitoring reports, acquisition documentation, critical correspondence and appraisals) in one location, and copies in a separate location. The copies are to be called the “Working File” and the original documents are to be called the “Permanent File.”

**Working File:** Contents of the Working File may include duplicates of the documents needed to implement the project’s management and/or monitoring plan in the field. The Working File shall not include any original documents. The Working File may include a summary of the original documents found in the Permanent File. A register of actions may also be used when appropriate to help orient UPLC staff and Board Members when accessing the Working File and to keep track of progress. The Working File shall be kept at the UPLC offices for accessibility purposes and maintained in an orderly fashion.

**Permanent Files:** The Permanent File is the complete record of the transaction and subsequent activity. It may contain the document summary or checklist; original correspondence, project memos and baseline data; originals of some and copies of other documents contained in the working file; and other reports, papers and documents appropriate for the permanent record of the project. The Permanent File shall be updated with the original of each new document as it is received. The safekeeping and storage of the Permanent File is contained in Policy 2D.