

PUBLIC NOTICE IS HEREBY GIVEN that the following governing body will meet at the date, time, and place herein set out. The tentative agenda for said meeting is as follows:

TENTATIVE AGENDA  
ATKINS CITY COUNCIL  
CITY HALL – 480 3<sup>RD</sup> AVENUE  
**TUESDAY, MAY 12, 2026**  
6:00 P.M.

1. Call to Order and Pledge of Allegiance led by Mayor Brian Cruise
2. Roll Call by City Clerk
3. Approval of the Agenda by City Council.
4. Citizens' Opportunity to address the Council:
  - In conformance with the Iowa Open Meetings law, no action or deliberation can occur on items presented during the Citizens' Forum
  - Please walk to the front and state your name and address and the subject of your discussion
  - Speakers are encouraged to limit their comments to three (3) minutes
5. Unfinished Business:
6. New Business:
  - A. Amendment to the City's Social Media Policy:
    - Review by Scott L. Flory, City Administrator
    - **Motion** to approve **Resolution #2026-05-01**, "A Resolution amending Resolution #2024-04-02 by amending the City's Social Media Policy" City of Atkins, Iowa".
    - Discussion and consideration of **Motion** by City Council
    - Roll Call Vote by City Clerk
  - B. Adoption of the Iowa League of Cities Records Retention Manual (4/2024):
    - Review by Scott L. Flory, City Administrator
    - **Motion** to approve **Resolution #2026-05-02**, "A Resolution approving and adopting a Records Retention Manual for Iowa Cities as a guideline for the management of records in the City of Atkins, Iowa" by City Council.
    - Discussion and consideration of **Motion** by City Council
    - Roll Call Vote by City Clerk

C. Ordinance Amending the Code of Ordinances of the City of Atkins, Iowa, by adding new sub-sections to Chapter 69.07 Parking Regulations (Temporary No-Parking and Parking on Residentially Zoned Property):

- Review by Scott L. Flory, City Administrator
- **Motion** to approve Ordinance #241, "An Ordinance amending the Code of Ordinances of the City Atkins, Iowa, by adding new sub-sections to Chapter 69.07 Parking Regulations" (1<sup>st</sup> reading)
- Discussion and consideration of **Motion** by City Council
- Roll Call Vote by City Clerk

D. Consideration of approval of a bid for a new sidewalk on City-owned property at 500 Cardinal Avenue (stormwater detention pond):

- Introduction by Scott L. Flory, City Administrator
- Review of competitive quotes and recommendation, David Schrier, Public Work Director
- **Motion** to approve quote and award work for sidewalk construction
- Discussion and consideration of **Motion** by City Council
- Voice vote by Mayor Cruise

E. Review of 2019 Atkins Water Distribution Study and 2023 Preliminary Engineering Report by Snyder & Associates:

- Introduction by Scott L. Flory, City Administrator
- Review by Nick Eisenbaccher, P.E., Snyder & Associates
- Discussion by City Council

7. City Administrator's Report:

- Review of Spring Large Item Drop-Off Event (April 30/May1st)
- Update on 1939 Water Tower Rehabilitation Work
- Outdoor Recreation Area Trail - StoryWalk Project Update

8. Mayor's Report:

9. Consent Agenda:

- Approval of April 28, 2026, City Council Meeting Minutes
- Approval of the bills & claims as submitted by the City Clerk

- Approval of April (2026) financial reports: Treasurer's Report, Bank Reconciliation, and Revenue & Expense Report.
- Approval of Retail Tobacco License for Casey's (401 Stone Brook Drive) (renewal)
- Approval of new Pavilion Rental Agreement and guidelines
- **Resolution #2026-05-03**, "A Resolution amending Resolution #2025-10-02 Approving the Preliminary and Final Plat for Koopman Holding 2<sup>nd</sup> Addition"
- Approval of Pay Request #16 to Garling Construction in the amount of \$17,670 (final pay estimate excluding the retainage)

10. Other Business:

11. Adjournment

NEXT REGULAR MEETING – MAY 26, 2026 at 6:00 P.M.

This notice is given pursuant to Chapter 21.4 (1) of the Code of Iowa and of the local Rules & Procedures of the Governing Body

*\*Written comments are welcome in advance of the meeting and may be received at the office of the City Clerk in-person, or by email at: [cityclerk@cityofatkins.org](mailto:cityclerk@cityofatkins.org) at Atkins City Hall, 480 Third Avenue, Atkins, IA 52206. Contact the City Clerk's Office if you plan to speak before the Council on an agenda item and need any special assistance.*

*Note: Some members may participate by telephone, per Section 21.8 of the Code of Iowa*

**RESOLUTION NO. \_\_\_\_\_**

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ATKINS, IOWA AMENDING  
RESOLUTION #2024-04-02 BY AMENDING THE CITY'S SOCIAL MEDIA POLICY**

**WHEREAS**, it is responsibility of local government to ensure that information is managed and distributed in a responsible and ethical manner; and

**WHEREAS**, the City of Atkin's social media policy was previously adopted on April 9, 2024; and

**WHEREAS**, it is necessary to amend various sections of the policy regarding public comments about City posts; and

**WHEREAS**, the City finds the public's sharing of input many times outweighs in a positive way the potential for criticism.

**NOW THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF ATKINS, IOWA:**

**Section 1.** The City Council of the City of Atkins, Iowa, hereby amends the adopted Social Media Policy of the City of Atkins, which is attached as "Exhibit A".

**Section 2.** This Resolution shall take effect immediately from and after its passage by the City Council of the City of Atkins, Iowa.

Attest:

\_\_\_\_\_  
Brian Cruise, Mayor

\_\_\_\_\_  
Shelley Annis, City Clerk/Treasurer

RESOLUTION NO. 2024-04-02

**A RESOLUTION APPROVING A SOCIAL MEDIA POLICY  
AND ESTABLISHING SITES**

WHEREAS, the City of Atkins City Administrator recommends that a social media policy be adopted establishing the purpose and standards for operating and maintaining a social media presence, and

WHEREAS, a policy has been developed for use by the City of Atkins, and

WHEREAS, the policy includes a provision that the City Council establishes City social media sites, and

WHEREAS, the City Administrator's office desires to maintain a Facebook page entitled, "The City of Atkins Iowa," to supplement information on the City's Website and encourage residents and others to learn about the actions of the City, and

WHEREAS, the City Administrator's office desires to establish and maintain a YouTube channel entitled, "The City of Atkins Iowa," to provide video recordings of City Council public meetings, and

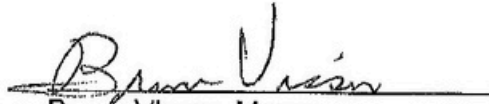
WHEREAS, the Fire Department desires to maintain a Facebook page entitled, "Atkins Fire & First Responders," to promote the Department's work on behalf of the community and region, and the work of the volunteer firefighters,

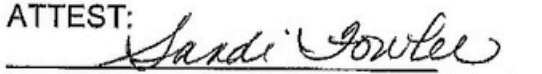
NOW, THEREFORE, BE IT RESOLVED, that the City Council of the City of Atkins, Iowa, authorizes the establishment of the Social Media Policy, and

BE IT FURTHER RESOLVED, that the City Council of the City of Atkins, Iowa, authorizes the City Administrator's Office establish and maintain a City Facebook Page and a City YouTube site, and the Fire Department establish and maintain a Fire Department Facebook Page.

Passed this 9th day of April, 2024.

Voting: Council member Bell moved the adoption of the Resolution. Seconded by Council member Koehn. Adopted, ayes, Council members Fisher, Koehn, Petersen, and Bell. Absent: Dursky.

  
Bruce Visser, Mayor

ATTEST:  
  
Sandi Fowler, Interim City Administrator

## Social Media Policy

### I. Overview

The City of Atkins ("City") official website, located at [www.cityofatkins.org](http://www.cityofatkins.org), will remain the City's official website and primary online source for communicating information to the public.

However, the City realizes a business need to use social media websites as additional communication channels to help promote its programs, events, services and to represent itself appropriately and consistently on the internet. The City's social media presence is not intended to create a public forum ~~and does not provide two-way conversation, and therefore all comments and messaging are to be disabled for both sites and postings.~~ Wherever possible, City social media sites should link back to the official City website for forms, documents, online services, and other information necessary to conduct business with the City.

### II. Definitions

- Posting: any writing, image, video, download, audio file, and hyperlink to other websites, or media which is downloaded, referenced, inserted, or placed upon any social media site.
- Social media or site: includes, but is not limited to, electronic communication through which users create online communities to share information, ideas, personal messages, photographs, videos, and other content.

### III. General Procedures

- The City of Atkins intends to use social media as follows:
  - To supplement information from other City communication sources, such as its official website and draw more eyes back to those communication sources.
  - To disseminate time sensitive information as quickly as possible (i.e. emergency information).
  - To broadcast the City's messages to the widest possible audience.
  - To provide video recordings of City Council public meetings.
- The establishment and use by any City department of City social media sites are subject to approval by the City Council. At the time such site is approved, the City Administrator must determine who will be responsible for developing the site including establishing an administrative profile, designating who will have authority for speaking on behalf of the City, and who will keep the site up to date.
- City social media accounts will only become affiliated with (i.e., "like," "follow," etc.) another social media page if it is related to official City business, services, and events.
- Elected officials, appointed members of City Boards, Commissions and committees, volunteers and employees must comply with the guidelines outlined in this document.
- Employees representing the City of Atkins on the City's social media sites must conduct themselves professionally and in accordance with this policy and all other City policies at all times as representatives of the City.

### IV. Standards for Operating and Maintaining a Social Media Presence

The City's social media accounts and their associated content should focus on significant City interest areas and be organized in a manner that avoids ambiguities and/or conflicting information across the City's various communications mediums. Use of the City's social media websites must comply with applicable laws, regulations and policies, as well as common business etiquette. The City's social media sites are subject to the Iowa open records laws, and any articles or content posted on such sites are subject to public disclosure.

The City Administrator or their designee will monitor the City's social media accounts to ensure

that the social media cites further the City's policies, interests, and goals.

The City of Atkin's social media page will adhere to the content standards below:

- ~~Commenting must be disabled on every post and on the site. Content shall direct users to the City's official Website for complete information and contact information to reach City officials.~~
- The social media page must contain a Disclaimer as set forth below.
- The City shall have a Facebook "pages," if any Facebook presence. The City shall not have a Facebook "groups." Other applications will be chosen that serve a business purpose.
- Postings shall be factual, respectful and on-point.
- If a factual mistake is found on the City's Facebook page, it should be corrected as soon as possible and show clearly that it has been corrected in subsequent posts.
- Social Media, including the Facebook Page may be used to share events occurring in the City to help create more visibility.
- Social Media, including the Facebook Page may acknowledge sponsorships, partnerships or thank you's to organizations, businesses, or residents.

#### V. Accuracy and Timeliness

The City of Atkins will make every effort to ensure the accuracy of the information provided on its social media pages. However, several factors that are beyond the City's control. Therefore, the City does not guarantee the accuracy of the information provided on its social medial page.

The City's timeliness about posts may also vary based on staff availability. Therefore, a disclaimer shall be posted on any social media site, stating:

*This social media page is intended to get information out to a wide number of people quickly, not as an in depth or complete source of information, but as an evolving supplement to the City of Atkins website ([www.cityofatkins.org](http://www.cityofatkins.org)), newsletter, press releases, and in-person communications. Staff will post or respond within office hours and within the varying perimeters of staff availability.*

#### VII. Removing Comments

~~In the case where comments have inadvertently been allowed, the City reserves the right to restrict or remove any content that is deemed in violation of City policy, including this policy, or applicable law. Any content removed based on these guidelines must be retained by the City Administrator or their designee for a minimum of five (5) years, including the time, date, and identity of the poster, when available. After five years the content may be destroyed. Removed comments should be archived for our records by completing the tracking form found in Appendix A.~~

The City reserves the right to restrict or remove any content deemed in violation of this social media or any applicable law. The City reserves the right to deny access to its social media site for any individual who violates the City's policies or the law at any time and without prior notice.

**RESOLUTION**

**A RESOLUTION APPROVING AND ADOPTING THE RECORDS RETENTION  
MANUAL FOR IOWA CITIES AS A GUIDELINE FOR THE MANAGEMENT OF RECORDS  
IN THE CITY OF ATKINS, IOWA**

WHEREAS, the City Council of the City of Atkins, Iowa has reviewed the Record Retention Manual for Iowa Cities (hereby referred to as "the Manual"), produced by the Iowa League of Cities, State Historical Society of Iowa's State Archives and Records Bureau and the Iowa Municipal Finance Officers Association; and

WHEREAS, the Manual was developed as a record retention and record disposal schedule as a statement of the period of time records must be retained in order to fulfill routine fiscal, legal, administrative and historical needs for named records; and

WHEREAS, the recommended retention periods for named records within the Manual takes into account requirements of the Code of Iowa, the Iowa Administrative Code and federal law; and

WHEREAS, the City of Atkins produces and accumulates records of official business as it is transacted, and the City Council of the City of Atkins, Iowa deems it in the best interest of the City to approve and adopt the Manual as a guideline to determine the length of time records shall be retained for audit, legal, or administrative use and historical value; and

WHEREAS, it shall be the responsibility of the head of each department to order the disposition of said records stored at City facilities as the schedule within the Manual states.

NOW, THEREFORE BE IT RESOLVED that the City Council of the City of Atkins, Iowa does hereby approve and adopt the Record Retention Manual for Iowa Cities as a guideline to determine record retention and destruction.

BE IT FURTHER RESOLVED that the City Council of the City of Atkins, Iowa gives authority to the City Clerk to dispose of such records per the Record Retention Manual guidelines.

PASSED, APPROVED, AND ADOPTED THIS 12<sup>TH</sup> DAY OF MAY 2026.

\_\_\_\_\_  
Brian Cruise, Mayor

ATTEST:

\_\_\_\_\_  
Shelley Annis, City Clerk/Treasurer



# RECORD RETENTION MANUAL FOR IOWA CITIES

500 SW 7th Street,  
Suite 101  
Des Moines, IA 50309  
Phone (515) 244-7282  
Fax (978) 367-9733  
[www.iowaleague.org](http://www.iowaleague.org)

This manual is intended to assist officials in the management of records created and received in the conduct of city business. Ideally, records should facilitate the efficient operation of municipal government, not impede it. This manual suggests methods for controlling records that can help convert a potential liability into an asset.

One method of controlling records is to establish a schedule for destroying records that are no longer needed. The largest section of this manual consists of such schedules for records most commonly found in Iowa cities. These schedules list categories of records, or series, and indicate the minimum periods city officials need to keep them for administrative, legal, fiscal, or historical purposes. The recommended retention periods align with the requirements outlined in the *Code of Iowa*, the Iowa Administrative Code, and federal law. In cases where no law exists, state and city officials who work with records were consulted.

In developing these schedules, no attempt was made to list all records that could exist in all cities. Rather, functional categories common to the majority of Iowa municipalities were identified. Record series retention and disposition schedules are only one component of an effective records management program. Inactive storage, historical appraisal, municipal records management ordinances, filing systems, electronic methods of recording and retrieving data, and disaster planning are some other components of record management important for municipalities.

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## Records Management

### Public Records Defined

*Code of Iowa* Section 22.1(3) defines the term “public records” relative to the examination of government records:

“As used in this chapter, “public records” includes all records, documents, tape, or other information, stored or preserved in any medium, of or belonging to this state or any county, city, township, school corporation, political subdivision, nonprofit corporation other than a fair conducting a fair event as provided in Chapter 174, whose facilities or indebtedness are supported in whole or in part with property tax revenue and which is licensed to conduct pari-mutuel wagering pursuant to Chapter 99D, or tax-supported district in this state, or any branch, department, board, bureau, commission, council, or committee of any of the foregoing.

“Public records” also includes all records relating to the investment of public funds including but not limited to investment policies, instructions, trading orders, or contracts, whether in the custody of the public body responsible for the public funds or a fiduciary or other third party.”

Common to both definitions is that:

- Records are information documented in the performance of the official business of an organization.
- Record content, not record form, determines whether or not information constitutes a record.

Any information documenting official business, whether recorded on paper or electronically, documented photographically, recorded in video or audio media, or documented using any other medium, constitutes a record.

### Record Creation and Maintenance

Records are created and maintained to facilitate memory. City officials cannot reasonably be expected to remember every fact relative to a government’s business. Records, once created or received, must be maintained in unaltered condition in order to afford reliable authority for subsequent business of the government.

### Managing Records

Municipal governments conduct a large amount of business that must be recorded. Accumulation of records of already transacted business (inactive records) can overwhelm available storage space and hamper retrieval of both active and inactive records.

Furthermore, records of business already transacted can prove both legally and financially burdensome, since records must be produced when requested. Retrieving records can be difficult if record management is not done properly.

Some records of business already transacted remain permanently valuable to the government due to their content, but most records are of no further use once the documented matter has been transacted and routine audit, legal, and administrative uses have been completed.

Management of records allows records to be routinely maintained for legally accountable periods and affords documentation that the records were maintained, then destroyed routinely, under those scheduled record retention periods. Records that are managed routinely and consistently from the time of their creation through their final disposition favor efficient use of those resources allocated for record keeping.

Record series retention and disposition schedules are developed by governmental organizations to ensure records are kept for as long as they are needed, routinely destroyed when no longer needed, and the disposition of records legally accounted for.

The lengths of time for which a series is routinely needed for audit, legal, administrative, and historical purposes determine how long records must be retained. In all cases, the longest of the respective periods of need for each record series is used. The record series retention and disposition schedule formally authorizes the retention and ultimate disposition of the record series.

#### **Record Series**

A record series is a collection of records filed together based on their relationship, maintained for an ongoing official function. As long as the documented official function continues, records are added to the series. Typically, components of a record series, such as files, electronic records, and databases, are filed separately from records documenting other functions. For instance, claims are grouped with claims, and city council minutes are filed together, representing distinct record series.

#### **Retention and Disposition Schedules**

A record series retention and disposition schedule is a formal statement of the period records must be retained to fulfill routine fiscal, legal, administrative, and historical needs for the records. Retention and disposition schedules are developed through analysis of those fiscal, legal, administrative, and historical needs for determination of the necessary routine retention. Records are then scheduled for appropriate retention and final disposition.

The record series retention schedule is intended to ensure that records are preserved for as long as needed but also, once retention needs have been met, those non-permanent records are destroyed in a routine, timely, and legally accountable manner. The retention and disposition schedule is formally adopted by the city to serve as the legal basis for records disposition.

Retention and disposition schedules govern routine records disposition. Where a non-routine need for extended retention of a specific record series is determined before the scheduled destruction (for example, when outstanding or anticipated litigation may require the use of the records in question), the records must, of course, be held past the scheduled destruction time. However once the non-routine need is past, the scheduled records can be legally destroyed.

Adherence to the record series retention and disposition schedule allows records to be destroyed routinely, freeing valuable storage space. Additionally, the smaller quantity of records that are scheduled for permanent retention are preserved and the resources available for permanent preservation of records are applied only to those records series determined to have permanent value to the government.

### Using Record Retention and Disposition Schedules

Record series retention and disposition schedules identify record series, and the disposition, expressed as a retention period, applies to those record series. The record series identified in the schedules in this manual are ones typically created or maintained by Iowa municipalities. In some cities, a given record series may be called a different name than the one used in this schedule. Also, some cities may place authority for the same functions under different departments. To determine an appropriate schedule for records in each particular city organization, it may be necessary to compare the known purpose of the city's own records with the indicated record series labels. Where no comparable example exists, a schedule should be developed, taking into account the administrative, fiscal, legal, and historical values of the record series, and adopted formally by the city.

Record series generally accrue continuously with new records being added to the file as new business is transacted. The retention period must be applied to manageable file increments since it would be unwieldy to individually apply the schedule to each record item (i.e., case file, claim, database record entry, etc.) at the time each record becomes inactive.

The retention schedule for a record series should correspond to the time frame in which that record series actually accrues, whether that be fiscal year or calendar year. Financial information, such as a file of claims, could be cut off at the end of the fiscal year and the retention and disposition schedule applied to that fiscal year's accrual of records. Claims for that entire fiscal year would be retained for five years after the fiscal year, then destroyed, and claims for succeeding fiscal years would be retained for five years after the close of each of those respective fiscal years. In this way, the physical process of destroying records is simplified, the records to be destroyed together are kept together until the scheduled destruction date, and the entire destruction can be documented as having been performed at the appropriate time.

### Record Disposition

Disposition is the final outcome of records retention, whether for destruction or permanent retention. Most records are scheduled to be destroyed after all normal legal, administrative, and fiscal needs for the record have expired. Those needs expire in a very short time for many record series, and for certain other record series, those needs continue for much longer periods. In either case, the records are to be destroyed once the needs for retaining the records have been met.

For a few records series, however, permanent retention is the scheduled final disposition. Some record series might have long-term legal, administrative, or fiscal value, but where a record series also documents the development of policy of the city government or the history of the city itself, the record series may be scheduled for permanent retention. Permanent retention is a commitment to preserve the record series without end. Only a portion of all record series have such historical value.

A record series allowed to accrue for years wastes storage space is difficult to use, and can become a legal liability. Only records scheduled for permanent retention can be allowed to accrue without routine destruction.

### **Destroying Records**

The record series retention and disposition schedule, duly adopted by the city government, formally governs the retention and final disposition of records. Adherence to scheduled periods of retention results in a consistent, routine disposition of records. Only in instances where exceptional needs can be clearly identified and specified, such as for outstanding or pending litigation for which specific records series are needed, should records be retained beyond the scheduled period of retention.

### **Permanent Retention**

The record series retention and disposition schedule indicates which records series are to be retained permanently as archives of the city government. Generally, records documenting the development of city policy (for example, council minutes) have permanent value for the history of the city organization and also for the history of the geographic area encompassed by the city. Records to be preserved as archives should be protected from extremes of temperature and humidity, light, rough handling, animals, cyber security and other conditions that may accelerate their deterioration or premature.

### **Retaining Electronic and Non-Paper Records**

The record series retention and disposition schedules apply to all physical formats in which record series are maintained. Whether paper or electronic, all records are destroyed or preserved in conformity with the record series retention and disposition schedules. The form of the record does not exempt it from the application of the schedule. Content and documentary purpose, rather than the physical form in which the record is maintained, define the record series.

### **Modifying a Record Retention Plan**

The retention periods indicated in the manual are based on reasons city officials in Iowa have found useful for scheduling the indicated record series. If the city's needs are different, it can make specific changes to its schedule to accommodate those needs. Changes should be adopted under the legal mechanism the city has established for modifying municipal ordinances or rules. Once legally adopted, the modified record series retention and disposition schedule governs the disposition of the record series, and adherence to the schedule is necessary for legal accountability.

Other records may be used in some cities for which no example in the existing manual provides a comparison. In such cases, the period the record is required to satisfy routine administrative, legal, and fiscal needs must be determined, as well as an appraisal of the historical value of the record series, to appropriately schedule the series. The State Archives in the State Historical Society of Iowa may be called upon for information concerning the appraisal of a record's historical value. Any resulting schedules should be submitted to the Iowa League of Cities for possible inclusion in updates to the manual.

## The Five Steps of Records Management

Records management can be defined as the systematic control of records from the time of their creation or receipt, through their organization and maintenance, to their ultimate disposition. Managing records means keeping only those records that are necessary and keeping them in a way that permits quick and easy access to the important information they contain. As cities continue to see increased documentation and reporting, managing records before they inundate the office is becoming increasingly difficult. Finding enough storage space for these records is one problem. Another challenge is efficiently locating a specific record when needed. The application of records management techniques can help solve them.

Major purposes of an efficient records management program are reducing the bulk of records stored by disposing of records that are no longer valuable, preserving the valuable records, and making records readily accessible to those who need them. The rewards of such a program are reduced costs for space, equipment, software and personnel and an orderly flow of information.

Public records found in city governments require special consideration. First, public records are public property, owned by the citizens, and in most cases, they are open to public scrutiny. Second, some public records protect the rights of the city and its citizens, and for this, they deserve special care. Third, public records often have historical value because they document the development of the community. Therefore, ensuring public access, protecting legal rights, and preserving historical information are important goals of a records management program in city government.

### How to Begin

The first task in establishing a records management program is the creation of record series retention and disposition schedules that identify records found in the city and indicate how long to keep them. The creation of these schedules requires three steps: inventory, appraisal, and scheduling. Making the schedules part of an ongoing program requires two more steps: organization and implementation.

In the preparation of the record series retention and disposition schedules in this manual, the first three steps were followed. Through the combined efforts of the Iowa League of Cities, the Iowa Municipal Finance Officers Association, and the State Historical Society, recommended record series retention and disposition schedules have been developed for many of the records found in many Iowa cities. Officials in individual cities may wish to review and repeat the first three steps when setting up a specific program in their city hall.

The last two steps, organization, and implementation, follow the decision-making and planning of the first three steps and constitute the action part of the program. Throughout all five steps, the process requires cooperation and participation from all city officials.

### Step 1: Conduct an Inventory

To begin, a city must find out what records it has stored, not only in active office space, but also in the basements, vaults, computers, mobile devices, servers, or any other place where inactive records have been stashed over the years. During the search, information about the records should be written down; inventory worksheets designed for this purpose can simplify this process. The details recorded at this stage may vary according to each city's needs, but the basic information should include the record's title, the time span the complete record encompasses, a physical

description of the record (letters and legal papers, databases, GIS systems, maps, electronic documents, etc.), location of the records, the equipment currently used to store the record, the amount of space a record occupies, and the frequency of staff reference to the record.

Most of these items are simply factual descriptions. It is usually most effective to categorize records according to function, subjects, or activity into what is called a “record series.” For example:

- “Correspondence” is too general a term to be helpful.
- “John Smith’s letter to the mayor regarding the bond issue to finance Main Street storm sewers” is too specific.
- “Bond issue correspondence” successfully labels a type of record for most inventory purposes.

If more than one person is conducting the inventory, it is wise to meet often so the record titles are standardized.

### **Step 2: Appraise the Records**

Once the inventory is complete, the inventory sheets should be sorted so the information gathered can be classified and appraised. The purpose of this appraisal process is to establish the value of a record series in preparation for the next step, deciding how long to keep it. This step may involve research into statutory and audit requirements as well as interviews with city officials in all departments about the current and future values of records in their areas. To appraise records in an orderly manner, the following criteria are used:

#### **Administrative Value**

These records establish policy or document operations. Those that document policy (minutes or resolutions for example) usually have a long-term value. Those that document operations (personnel time sheets or monthly reports) usually have value for a relatively short length of time.

#### **Legal Value**

These records document the rights and obligations of the city and its citizens. Examples are records showing the basis for an action (legal decisions and opinions), documents representing legal agreements (leases, titles, contracts), and records of action in particular cases (claims, dockets). Retention periods can be dictated by the legal statute of limitations or the term of the agreement, in which case the retention period would be relatively short. However, records documenting long-term legal rights and obligations are typically retained permanently.

#### **Fiscal Value**

These records document the day-to-day financial transactions of a city as well as long-term financial planning and policy. Records that show financial transactions generally have a relatively short-term value determined by the audit period or specific law. Records that document financial policy usually have a longer-lasting value.

**Historical Value**

Records with historical value may have a future research use, although the original administrative, legal, or fiscal value no longer exists. They are permanently valuable to a city because they document the development of policy and/or the growth of the community. The historical value of a record is often the most difficult quality to determine.

Each of these values should be considered when deciding how long to keep a record. A specific record can have value in more than one category, and, if one does, the retention period must satisfy the longest need.

**Step 3: Schedule the Records**

After the classification and evaluation of records in the appraisal process, a decision is made on how long to keep each record series. This information is compiled into a record series retention and disposition schedule that names a record series and states its retention period, usually in columns. The following example shows a simple format:

Record Title	Retention Period	Reason
Minutes of City Council	Permanent	<i>Code of Iowa, 372.13(5)</i>
Building Permits	Permanent	Continuing administrative value
Purchase Orders	5 years	Fiscal value ends
Dog Licenses	3 years	Administrative and legal values ends

More complex formats can be used if directions are to be given about location and form of retention at various stages in the record’s lifespan. A more complex format can also address the problem of duplicate copies of the same record. An example of a more complex format follows.

Record Title	Active Use	Inactive Storage	Final Disposition
<b>Minutes</b>			
a. Official copy in clerk’s office	10 years	Permanent	Retain originals
b. Working copies in other offices	As long as administratively useful	None	Destroy
<b>Building Permits</b>			
Building Permits	3 years	Permanent	Destroy originals
<b>Purchase Orders</b>			
a. Official copy in the finance office	2 years	2 years	Destroy
b. Office of origin	2 years	2 years	Destroy
<b>Dog Licenses</b>			
Dog Licenses	Current year	2 years	Destroy

The schedules in this manual are in a simpler format. As the second example demonstrates, however, schedules tailored for your city can be more detailed, reflecting your city’s needs and resources.

Once created, these schedules should be made available to all departments in the city so all offices can use them. Although the record series retention and disposition schedules may be revised in the future, they form the basis of the records management program.

#### **Step 4: Organize the Records**

Using the information gathered in the inventory process and decisions made in the appraisal and scheduling steps, city personnel in all departments now can roll up their sleeves and physically organize their records. In the active office area, the filing system used for current records may be adequate, but if changes are needed they should be made during the organization of records. At this time files should be weeded of valueless paper and non-current records should be removed for storage in inactive areas.

The following suggestions can help organize records in this area:

1. Store records of the same record series together.
  - Do not mix payroll records with commission minutes or canceled checks with dog licenses in the same box or electronic file.
  - Before moving correspondence files to inactive storage, separate routine, less valuable records from those containing information with long-term value.
  - Consolidate information from different departments and dispose of unnecessary duplicate copies of the same record.
2. Store records with the same retention period together.
3. Destroy valueless records based on the retention and disposition schedules.
4. Label the remaining records in a clear, consistent manner.
  - Do not use a term such as “Financial Records” as it is too general. A specific term such as “invoices” or “daily cash receipts” is more helpful.
  - Be consistent in the labeling; choose a term and stick with it. “Claims,” “bills,” or “vouchers,” may all be the same thing, but the different terms can cause confusion.
5. Prepare a list or index identifying what and where records are stored and make this information available to all departments.
6. Maintain what is used for storage and make the records easily accessible.

#### **Step 5: Implement the Program**

Once the organizational phase of the program is completed, city officials might consider the job done. Certain steps in the process, however, need to be repeated regularly in the future to qualify these records management efforts as a “program” rather than a mere house cleaning.

The inventory process will not have to be repeated if systematic labeling and indexing take place. The appraisal process might only have to be done again on a limited basis as new records series are created or reassessment of an old series becomes necessary. Schedules form a basis for the program and do not need to be changed often, but they can be amended as needed.

Implementation of the program means repeating the organizational step often. On almost a daily basis, new records will enter the system. They should be adequately labeled and logically filed at that time. On an annual basis, the record series retention and disposition schedules should be checked. Non-current records should be removed from active files, weeded, consolidated, labeled and indexed before storing them in inactive areas. Records scheduled for destruction should be removed and destroyed. If they are allowed to accumulate, physical and digital storage areas will become as overcrowded as they were before the program began.

Implementing the steps of the organizational phase regularly will ensure that the considerable amount of time and effort spent in initiating the program will not go to waste. With some effort, city officials can enjoy the benefits that an ongoing records management program can provide.

## Managing Electronic Records

Government agencies must manage their electronic records appropriately. Like all other government records, electronic records are subject to requirements of the *Code of Iowa* Chapter 22 “Examination of Public Records” and litigation. As with all records, cities must ensure that they are retaining, managing, and properly destroying their electronic records. This guide is designed to help employees of local governments who create, receive, and retain electronic records follow existing procedures and protect themselves and their city.

### Electronic Records Defined

An electronic record is information recorded by a computer or other electronic device that is produced or received in the initiation, conduct, or completion of a city or individual activity. Examples of electronic records include email and text messages, word-processed documents, electronic spreadsheets, digital images, and databases. Many electronic records are maintained as part of an electronic recordkeeping system, such as geographic information systems (GIS), digital image storage systems, computer-aided design (CAD) systems, and electronic commerce systems.

### Electronic Records as Public Records

Electronic records are public records if they are created or received as part of performing official duties and fall under the *Code of Iowa* Chapter 22.

All electronic records that are created, received, or stored by a city are the property of the city; they are not the property of its employees, vendors, or customers. Employees should not expect privacy when using the city’s computers and electronic devices.

### Use of Home Computer or Personal Device

Records created in the performance of an official function must be managed in the same way as those created and received using government computer resources. This holds true when a home computer or personal device is used to create or receive city records.

### **Electronic Records Under *Code of Iowa* Chapter 22 and During Litigation**

Electronic records might be released in accordance with the *Code of Iowa* Chapter 22 or during the discovery process. Computers and electronic devices are provided to employees for conducting public business. Employees should be prepared to provide access to their electronic records to their supervisor or their city's attorney under these circumstances. Electronic records that are created using home computers that are related to public business might also be released in accordance with the *Code of Iowa* Chapter 22.

### **Employee Responsibilities with Electronic Records**

Government employees are responsible for organizing their electronic records so they can be located and used. They are also responsible for using an approved record series retention and disposition schedule to identify how long electronic records must be kept and when or if they can be deleted.

### **Record Retention and Disposition Schedules**

The State Historical Society and the Iowa Municipal Finance Officers Association have worked with the Iowa League of Cities to create general record series retention and disposition schedules that can be used by city governments. If the records in an office are not inventoried on a general schedule, a special or specific schedule must be created to cover the records in that office. The Iowa League of Cities is available to advise cities about the process for creating special record series retention and disposition schedules.

### **Application of Retention and Disposition to Electronic Records**

Record series retention and disposition schedules apply to electronic records. You may contact the Iowa League of Cities for information concerning reviewing your electronic recordkeeping systems to determine if any changes are needed to your city's record series retention and disposition schedule.

### **Impact of Software Changes**

Electronic records must be retained in accordance with a record series retention and disposition schedule, so the database must be listed on a schedule. The schedule will tell you how long to keep the older data and will help you design the new computer system to purge data at the appropriate time. Note: Electronic records cannot be destroyed if they have been requested under *Code of Iowa* Chapter 22, or if they are part of ongoing litigation, even if their retention period has expired.

Many electronic records need to be kept longer than the original technology that was used to create them. New technology is not always compatible with older technology that cities may have used. Cities are responsible for ensuring that older electronic records remain accessible as technology is upgraded or changed. Each time technology upgrades and changes occur cities should be aware of the existence and location of older electronic records so they can be migrated to the new technology.

### Storing Electronic Records

Cities need to know how long their electronic records must be retained before they select their storage system. Therefore, record series retention and disposition schedules must include electronic records. It is unlikely that most electronic records will be stored in their original software format and on their original storage system for their entire retention period. Cities need to consider these changes in hardware and software when they select new technology.

### Deleting Electronic Records

Individual employees are responsible for deleting electronic records in accordance with the appropriate record series retention and disposition schedule. Deleted electronic records, however, may be stored on backup systems for several days, weeks, or months after they are deleted. Cities need written procedures to ensure that deleted electronic records are rendered unrecoverable regularly. Note: Electronic records cannot be destroyed if they have been requested under *Code of Iowa* Chapter 22, or if they are part of ongoing litigation, even if their retention period has expired.

## Questions?

For more information, contact:

**Iowa League of Cities**  
500 SW 7th Street, Suite 101  
Des Moines, IA 50309  
(515) 244-7282  
[www.iowaleague.org](http://www.iowaleague.org)

**State Historical Society of Iowa**  
Archives  
600 East Locust  
Des Moines, IA 50319  
(515) 281-7801

## Schedule 1: Administrative and Legal Records

Record Title	Retention Period	Reason
<b>I. Council Proceedings</b>		
<b>A. Minutes</b>		
1. Official Copy	Permanent	<i>Code of Iowa</i> , 372.13(5). Also continuing legal, administrative, and historical value.
2. Working Copies	As long as administratively useful; then destroy	Administrative value ends
3. Index	Permanent	Continuing administrative and historical value
4. Audio Recordings and minutes of Closed Sessions	1 year from the date of the meeting; unless required to retain due to pending litigation	<i>Code of Iowa</i> , 21.5(4). Administrative and legal value ends.
5. Agendas	5 years	Administrative value ends
<b>B. Ordinances</b>		
1. Current code	Permanent	<i>Code of Iowa</i> , 372.13(5). Also continuing legal, administrative, and historical value.
2. Superseded Code	Two copies permanent	Continuing historical value
3. Index	Permanent	Continuing administrative and historical value
4. Individual Copies of Ordinances for Disbursement	Until superseded; then destroy	Administrative and legal value ends
<b>C. Resolutions</b>		
1. Official Copy	Permanent	<i>Code of Iowa</i> , 372.13(5). Also continuing legal, administrative, and historical value.
2. Working Copies	As long as administratively useful; then destroy	Administrative value ends
3. Index	Permanent	Continuing administrative and historical value
<b>D. Affidavits of Publication</b>		
1. Re: Budget	Until audited or 5 years	Fiscal and legal value ends
2. Re: Ordinances	Until recodification	Fiscal and legal value ends
3. Re: Bond Issues	Permanent	Continuing legal and historical value
4. Others	5 years	Fiscal and legal value ends
<b>E. Oaths of Office</b>	If in writing, add to the official copy of council minutes for permanent retention	Continuing legal and historical value
<b>F. City Official Bonds</b>	5 years after expiration	Legal value ends

## Schedule 1: Administrative and Legal Records, continued

Record Title	Retention Period	Reason
<b>II. Real Property</b>		
<b>A. Title Documents</b>		
1. Deeds	Permanent	<i>Code of Iowa, 372.13(5)</i> . Also continuing legal, administrative, and historical value.
2. Title Opinions	Permanent	<i>Code of Iowa, 372.13(5)</i> . Also continuing legal, administrative, and historical value.
3. Abstracts and Certificates of Title	Permanent	<i>Code of Iowa, 372.13(5)</i> . Also continuing legal, administrative, and historical value.
4. Title Insurance	Permanent	<i>Code of Iowa, 372.13(5)</i> . Also continuing legal, administrative, and historical value.
5. Condemnation Proceedings	Permanent	<i>Code of Iowa, 372.13(5)</i> . Also continuing legal, administrative, and historical value.
<b>B. Easements and/or Right of Way Agreements</b>	Permanent	<i>Code of Iowa, 372.13(5)</i> . Also continuing legal, administrative, and historical value.
<b>C. Plats (legal descriptions, maps, plat books, both current and outdated)</b>	Permanent	<i>Code of Iowa, 372.13(5)</i> . Also continuing legal, administrative, and historical value.
<b>D. Vacations/Alterations of Plat</b>	Permanent	<i>Code of Iowa, 372.13(5)</i> . Also continuing legal, administrative, and historical value.
<b>E. Annexation Files</b>	Permanent	<i>Code of Iowa, 372.13(5)</i> . Also continuing legal, administrative, and historical value.
<b>III. Permits and Licenses</b>		
<b>A. Cigarette</b>	5 years	Administrative and legal value ends
<b>B. Dog or Cat</b>	5 years	Administrative and legal value ends
<b>C. Liquor and Beer</b>	5 years	Administrative and legal value ends
<b>D. Restaurant</b>	5 years	Administrative and legal value ends
<b>E. Miscellaneous Business (peddler, taxi, mobile food trucks, etc.)</b>	5 years	Administrative and legal value ends
<b>F. Special Events (parades, festivals, etc.)</b>	5 years	Administrative and legal value ends
<b>IV. General</b>		
<b>A. Accidents on City Property Involving City</b>		
1. Claims Settled out of Court	10 years after settlement	Legal value ends
2. Court Decisions	Permanent	Continuing legal value
<b>B. Bids</b>		
1. Accepted	5 years	Legal and fiscal value ends
2. Rejected	5 years or 1 year after audit	Legal and fiscal value ends
<b>C. Blueprints or Plans for City-Owned Structures</b>	Permanent	Continuing administrative and historical value
<b>D. Cemetery Records, Burial Records</b>	Permanent	Continuing historical value

## Schedule 1: Administrative and Legal Records, continued

Record Title	Retention Period	Reason
<b>E. Contracts or Agreements for Services, Purchases of Equipment or Supplies, Concessions</b>	10 years after expirations	Legal value ends
<b>F. Correspondence</b>	As long as administratively useful; appraise for permanent retention	Possible long-term administrative use and historical value
<b>G. Daily Diaries or Logs (appointment calendars, telephone or radio logs, task lists, etc.)</b>	5 years	Administrative value ends
<b>H. Equipment Records</b>		
1. Inventories	While current	Administrative value ends
2. Maintenance History	Life of equipment	Administrative value ends
3. Cost of operation summaries	5 years	Administrative value ends
4. Information Service Records		
a. Computer equipment inventory	While current	Administrative value ends
b. Telephone and mobile phone	5 years	Administrative value ends
c. Depreciation reports and records	5 years	Administrative value ends
d. Vendor information	5 years	Administrative value ends
<b>I. Franchise Agreements</b>	5 years after expiration; appraise for permanent retention	Legal value ends; possible continuing historical and legal value
<b>J. Insurance Policies</b>	5 years after expiration	Legal value ends
<b>K. Leases</b>	7 years after expiration; appraise for permanent retention	Legal value ends; possible continuing historical and legal value
<b>L. Legal Actions</b>		
1. Civil Lawsuits and Administrative Law Proceedings	5 years after closure	Administrative and legal value ends
2. Criminal and Municipal Infraction Cases – Closed	5 years	Administrative value ends
3. Civil Case – Closed	5 years	Administrative value ends
4. Citations	5 years	Administrative value ends
<b>M. Legal Opinions</b>		
1. Informal Opinions	5 years	Administrative and legal value ends
2. Formal Opinions	Permanent	Continuing legal value
<b>N. Maps, Current and Outdated (road, street, zoning, park, flood plain, topography, utilities, etc.)</b>	Permanent	Continuing administrative and historical value
<b>O. Minutes of Boards and Commissions</b>	Permanent	Continuing administrative and historical value
<b>P. Notices Sent to Citizens to Comply with Ordinances (including nuisance abatement notices)</b>	5 years after disposition	Administrative and legal value ends

**Schedule 1: Administrative and Legal Records, continued**

Record Title	Retention Period	Reason
<b>Q. Petitions from Citizens</b>	5 years after issue closed; appraise significant issues for permanent retention	Administrative and legal value ends; possible historical value
<b>R. Promotional Materials</b>		
1. City Newsletters	Permanent	Continuing historical value
2. Advertising Contracts	5 years	Administrative and legal value ends
3. Press Releases	5 years	Administrative value ends
4. Pamphlets, Brochures	Appraise for permanent retention	Possible historical value
5. Newspaper Clippings	Permanent	Continuing historical value
<b>S. Photos, Scrapbooks</b>	Appraise for permanent retention	Possible historical value
<b>T. Reports from Departments</b>		
1. Monthly	5 years	Administrative value ends
2. Annual	Permanent	Continuing historical value
<b>U. Studies, Surveys</b>		
1. From an Outside Source	As long as administratively useful	Administrative value ends
2. Pertaining Directly to City	Appraise for permanent retention	Possible historical value
<b>V. Election Records</b>		
1. Precinct Maps, Current and Outdated	Permanent	Continuing historical value
2. City Elections		
a. Election Petitions	Permanent	Continuing historical value
b. Abstracts	Permanent	Continuing historical value
<b>VI. Finance/Purchasing Records</b>		
<b>A. Minutes of the Board</b>	Permanent	Continuing administrative, legal, and historical value
<b>B. Reports</b>		
1. Actuary	5 years	Fiscal value ends
2. Investment	5 years	Fiscal value ends
3. Fund	5 years	Fiscal value ends
<b>C. Case File (actions, appeals, decisions)</b>	Permanent	Continuing administrative, legal, and historical value
<b>VI. Finance/Purchasing Records</b>		
<b>A. Leases</b>		
1. Agreements and Related Documents Acted on by Council	Upon expiration, 5-year minimum	Administrative value ends
2. Agreements not Requiring Council Action	5 years after expiration, 5-year minimum	Administrative value ends
<b>B. Purchase Orders</b>		
1. Purchase Orders	10 years after order date or life of purchase	Administrative value ends
2. Change Orders	10 years after order date	Administrative value ends

## Schedule 1: Administrative and Legal Records, continued

Record Title	Retention Period	Reason
<b>C. Bids, Quotes and Proposals</b>		
1. Official Copy, Bid/Proposal RFP	10 years after completion of contract	Administrative value ends
2. Copies of Bids Received and Related Documents for Public Improvement Projects and Acted on by Council	10 years after completion of contract; awarded bids retained permanently.	Administrative value ends; continuing administrative value
3. Copies of Bids Received and Related Documents for Fleet Equipment Acted on by Council	Lifetime of equipment; unaccepted bids: 1 year after acceptance of winning bid	Administrative value ends
4. Copies of Bids Received and Related Documents for Other Equipment and Service Projects Acted on by Council	10 years after completion of contract; unaccepted bids: 1 year after acceptance of winning bid	Administrative value ends
5. Originals of Bids, Quotes and Proposals Received for Contracts Not Awarded by Council	10 years after completion of contract except fleet equipment and buses; lifetime of equipment and other capital equipment; 10 years after completion of contract or upon expiration of warranty, whichever is more	Administrative, grant and warranty issues are active until equipment is taken out of service.
<b>D. Printing Charges</b>		
	5 years	Administrative value ends
<b>E. Central Stores</b>		
1. Stocks of Material Safety Data Sheets for Distribution	30 years after last use	Administrative value ends
2. Issue Slips	After audit completion or at least 5 years	Administrative value ends
<b>F. Materials Inventory Records</b>		
1. Issue Records	5 years	Administrative value ends
2. Receipt Records	5 years	Administrative value ends
3. Catalogued Inventory Physical Count Records	After audit completion or at least 5 years	Administrative value ends
4. Catalogued Inventory Year-End Exception/Adjustment Record	After audit completion or at least 5 years	Administrative value ends
5. Cataloged Inventory Adjustment Record	After audit completion or at least 5 years	Administrative value ends
6. Non-catalogued Inventory Physical Count Record	After audit completion or at least 5 years	Administrative value ends
7. Year-end Materials Inventory Summary	After audit completion or at least 5 years	Administrative value ends
<b>G. Interdepartmental Charges</b>		
1. Fax Charges	After audit completion	Administrative value ends
2. City Hall Copier Readings	After audit completion	Administrative value ends

## Schedule 2: Financial Records

Record Title	Retention Period	Reason
<b>I. Revenue</b>		
<b>A. Notice of Property Tax Allocation from County</b>	5 years	Fiscal value ends
<b>B. Notice of Liquor Tax Allocation from State</b>	5 years	Fiscal value ends
<b>C. Property Tax Assessment Books</b>	Permanent	Continuing historical value
<b>D. Federal Revenue Sharing Records</b>	5 years	Fiscal value ends
<b>E. Investments (Notice of interest earned or reports of growth, dividends, purchase, sales, etc.)</b>	5 years	Fiscal value ends
<b>F. Parking Revenue</b>		
1. Income from Meters and Lots (daily receipts, monthly summaries, ledgers, deposit slips)	5 years	Fiscal value ends
2. Income from Violations (ticket copies, logs, daily receipts, monthly summaries, deposit slips)	5 years	Fiscal value ends
<b>G. Road Use Tax Funds</b>		
1. Application for Financial Aid (Forms 230001, 230002, agreement, invoices, payment vouchers, certificate of audit)	5 years	Fiscal value ends
2. Annual Street Finance Report	5 years	Fiscal value ends
3. Street Construction Program (Form RUT 1-A, 220001, 220002)	5 years	Fiscal value ends
4. Aerial Street Maps	Permanent	Continuing historical value
<b>H. Claims for Refunds of State Sales Tax</b>	5 years	Fiscal value ends
<b>I. Claims for Refunds of State Fuel Tax</b>	5 years	Fiscal value ends
<b>J. Special Assessments</b>		
1. Certified Mail Stubs from Notice to Property Owners	5 years after final payment	Fiscal and legal value ends
2. Assessment Title Searches	5 years	Fiscal and legal value ends
3. Preliminary and Fiscal Assessment Schedules	5 years after final payment	Fiscal and legal value ends
4. Petition and Waiver (agreements to special assessments)	5 years after final payment	Fiscal and legal value ends
5. Assessment Plats	5 years after final payment	Fiscal and legal value ends
6. Certificate of Levy and Final Assessment	5 years after final payment	Fiscal and legal value ends

**Schedule 2: Financial Records, continued**

Record Title	Retention Period	Reason
<b>K. Bond Issues and Proceedings</b>		
1. Bond Certificates	5 years after final recall	Fiscal value ends
2. Redeemed Coupons	5 years after final recall	Fiscal value ends
3. Bond Register	Permanent	<i>Code of Iowa, 372.13(5)</i> . Also continuing administrative, legal, and historical value.
4. Proceedings (notice and call of public meeting, minutes and certificate of meeting, certificate of referendum, legal opinions)		<i>Code of Iowa, 372.13(5) and 76.10</i> . Also continuing administrative, legal, and historical value
5. Remittance Advice Received with Payments	5 years	Fiscal value ends
<b>L. Records of Federally Funded Public Improvement Projects (applications, contracts, accounting and banking records, payroll, EEO compliance records) Also see Schedule 4, Public Works Records</b>	5 years after final payment, if audited	Fiscal value ends
<b>II. Accounting</b>		
<b>A. Source Documents</b>		
1. Accounts Payable		
a. Requisitions	5 years	Fiscal value ends
b. Purchase orders	5 years	Fiscal value ends
c. Invoices, statements, bills	5 years	Fiscal value ends
d. Claims presented to council	5 years	Fiscal value ends
e. Check/warrant copies or stubs	5 years	Fiscal value ends
f. Vendor ledger cards	5 years	Fiscal value ends
2. Accounts Receivable		
a. Receipt copies or books	5 years	Fiscal value ends
b. Daily cash receipt tabulation (cash register tapes, tallies, etc.)	5 years	Fiscal value ends
c. Invoices, statements, bills	5 years	Fiscal value ends
<b>B. Books of Original Entry</b>		
1. Receipt Journal	10 years	Fiscal value ends
2. Disbursement Journal	10 years	Fiscal value ends
3. General Journal	10 years	Fiscal value ends
4. Appropriations Journal	10 years	Fiscal value ends

## Schedule 2: Financial Records, continued

Record Title	Retention Period	Reason
<b>C. Ledgers</b>		
1. General Ledger	Permanent	Continuing fiscal value
2. Subsidiary Revenue Ledger Cards	10 years	Fiscal value ends
3. Subsidiary Appropriation/ Expenditure Cards	10 years	Fiscal value ends
<b>III. Banking</b>		
A. Checking Account Statements	5 years	Fiscal value ends
B. Check/Warrant Register (same as Disbursement Journal, above)	10 years	Fiscal value ends
C. Canceled Checks/Warrants	5 years	Fiscal value ends
D. Savings Account Statements	5 years	Fiscal value ends
E. Reconciliation Worksheets	5 years	Fiscal value ends
<b>IV. Financial Reports</b>		
A. Annual Financial Report	Permanent	Continuing fiscal value
B. Treasurer's/Clerk's Report	5 years	Fiscal value ends
C. Sales Tax and Use Tax Reports	5 years	Statute of limitations on audit
D. Grant Reports	5 years after audit; 7 years if not audited; grant terms if not stated therein	Fiscal value ends
V. Audits	Permanent	Fiscal value ends
<b>VI. Budget</b>		
A. Appropriation Requests from Departments	5 years	Fiscal value ends
B. Annual Budget Forms	5 years	Fiscal value ends
C. Final Budget and Certificate Summary	2 copies permanent	Continuing fiscal and historical value
D. Budget Amendments	2 copies permanent	Continuing fiscal and historical value

## Schedule 3: Payroll and Personnel Records

Record Title	Retention Period	Reason
<b>I. Payroll</b>		
<b>A. Payroll Journal (shows name, SSN, earnings, deductions, net pay/period and yearly totals)</b>	60 years	Fiscal value ends (satisfies long-term need for future salary and pension inquiries)
<b>B. Payroll Support Documents</b>	5 years	Fiscal value ends
<b>C. Federal Reporting Forms</b>		
1. W-2, W-3, W-4	5 years	Fiscal value ends
2. 941E Quarterly Report	5 years	Fiscal value ends
3. Copy of Deposit Card	5 years	Fiscal value ends
4. 1099, 1096	5 years	Fiscal value ends
<b>D. State Reporting Forms</b>		
1. Withholding Agents Reports	5 years	Fiscal value ends
2. Job Service Report	5 years	Fiscal value ends
3. Copy of Deposit Card	5 years	Fiscal value ends
4. IPERS	5 years	Fiscal value ends
5. MFPRSI	5 years	Fiscal value ends
<b>II. Payroll</b>		
<b>A. Individual Employee File</b>		
1. Job Description and History	Permanent	Continuing historical value
2. Application and Resume	60 years	Administrative value ends (satisfies the long-term need for future inquiries)
3. Civil Service Test, Scores, Placement	60 years	Administrative value ends
4. Evaluations, Discipline, Demotion, Promotion, Awards	60 years	Administrative value ends
5. Continuing Education	60 years	Administrative value ends
6. Medical Information (separate file)	60 years	Administrative value ends
7. Resignations, Reasons for Leaving	60 years	Administrative value ends
8. Claim for IPERS	60 years	Administrative value ends
9. Unemployment Insurance Claims	5 years	Fiscal value ends
10. Garnishments	Through closure plus 1 year	Fiscal value ends
11. Enrollment for Direct Deposit, Insurance, Savings Bonds, Etc.	While current	Administrative value ends
12. Centralized I9 (separate)	3 years after hire date, or one year after the date employment ends, whichever is later.	Administrative value ends
<b>B. Applications of Those Not Hired</b>	5 years	Administrative value ends

## Schedule 3: Payroll and Personnel Records, continued

Record Title	Retention Period	Reason
<b>C. Civil Service Records</b>		
1. Minutes of the Board or Commission	Permanent	Continuing administrative and historical value
2. Roster of Eligible Applicants	5 years	Administrative value ends
3. Case Files (actions, appeals, decisions)	10 years	Legal value ends
<b>D. Equal Employment Opportunity</b>		
1. EEO-4 Report	5 years	Administrative value ends
2. Plans		
a. City's	5 years	Administrative value ends
b. Potential contractors'	5 years	Administrative value ends
<b>E. Health Insurance Payments, Claims</b>		
1. Employer's Report	5 years	Administrative and fiscal value ends
2. OSHA Report	5 years	Administrative and fiscal value ends
3. Workers' Compensation Reports	2 years from the date of occurrence on which benefits are claimed or 3 years from the last payment of weekly compensation benefits	<i>Code of Iowa</i> , 85.26. Legal value ends.
<b>F. Union Records</b>		
1. Negotiations	As long as administratively useful; then appraise for permanent retention	Administrative value ends. Possible historical value.
2. Contracts	Permanent	Continuing administrative and historical value
3. Fact Finding and Arbitration Cases	5 years minimum then appraise for permanent retention	Administrative value ends. Possible historical value.
4. Case Files (actions, appeals, decisions)	10 years then appraise for permanent retention	Legal value ends. Possible historical value.
<b>G. Public Service (PSE) Contracts, Claims, Etc.</b>		
	5 years	Administrative and fiscal value ends
<b>H. Miscellaneous</b>		
1. Classification Studies	5 years	Administrative value ends. Appraise for possible historical value.
2. Compensation Surveys	5 years	Administrative value ends. Appraise for possible historical value.
3. Administrative Studies	5 years	Administrative value ends. Appraise for possible historical value.
4. Job Specifications	Permanent	Continuing historical value
5. Personnel Policies, Pay Plans, Etc.	Permanent	Continuing historical value
6. Internal Investigations	10 years	Administrative and legal value ends. Appraise for possible historical value.

## Schedule 4: Public Works Records

Record Title	Retention Period	Reason
<b>I. General Records Common to Engineering and Planning &amp; Zoning Departments</b>		
<b>A. Annexation Files</b>	Permanent	Continuing administrative and historical value
<b>B. Maps, Current and Outdated (road, street, zoning, park, flood plain, topography, utilities, etc.)</b>	Permanent	Continuing administrative and historical value
<b>C. Plats (subdivision, annexation, assessors, legal descriptions, plat books)</b>	Permanent	Continuing administrative and historical value
<b>D. Studies or Surveys</b>		
1. From Outside Source	As long as administratively useful	Administrative value ends
2. Pertaining to City	Appraise for permanent retention	Possible historical value
<b>E. Subdivision Files</b>	Permanent	Continuing administrative and historical value
<b>II. Engineering Records</b>		
<b>A. Blueprints or Plans of City-Owned Structures</b>	Permanent	Continuing administrative and historical value
<b>B. Bridge Records (inspection and maintenance)</b>	Life of structure	Administrative value ends
<b>C. Capital Improvement Projects</b>		
1. Authorization Phase	5 years	Administrative value ends
a. Minutes of Hearing, Clerk's Certificate, Resolutions	Permanent (part of minute and resolution books)	Continuing legal and historical value
b. Specifications	Permanent	Continuing administrative and historical value
c. Notice of Hearing and Letting (proof of posting documents, instructions to bidders, bid, bid bond, performance bond, certificate of insurance)	5 years after project completed, if audited	Fiscal and legal value ends
d. Contract	Life of structure	Administrative and legal value ends
2. Financing Phase	See Schedule 2, Financing Records	
a. Special Assessments, Bond Issues, State or Federal Grants		
3. Pre-Construction Phase		
a. Appraisals	5 years after project completed; if project not initiated, retain as administratively useful	Administrative and fiscal value ends
b. Environmental Impact Surveys	5 years	Administrative value ends
c. Historical Surveys of Buildings	Appraise for permanent retention	Possible historical value
d. Relocation Files	5 years after final payment	Administrative and fiscal value ends

## Schedule 4: Public Works Records, continued

Record Title	Retention Period	Reason
e. Condemnation Files	Permanent	Continuing legal and historical value
f. Demolition Files	Permanent	Continuing legal and historical value
<b>4. Construction Phase</b>		
a. Work Orders	5 years after project completed, if audited	Administrative and fiscal value ends
b. Daily Diaries	5 years after project completed, if audited	Administrative and fiscal value ends
c. Payroll Records	5 years after the project is completed, if audited	Administrative and fiscal value ends
d. Change Orders	5 years after the project is completed, if audited	Administrative and fiscal value ends
e. Cement or Other Purchases	5 years after project completed, if audited	Administrative and fiscal value ends
f. Inspections, Testing	5 years after project completed, if audited	Administrative and fiscal value ends
g. Progress Reports	5 years after project completed if audited	Administrative and fiscal value ends
h. Pay Requests	5 years after project completed, if audited	Administrative and fiscal value ends
i. Blueprints, Tracings	Permanent	Administrative, and fiscal value ends
j. Certificate of Completion and Acceptance	Permanent	Administrative and fiscal value ends
<b>D. Deeds, Easements or Right of Way Agreements</b>	Permanent	Continuing legal and historical value
<b>E. Land Survey Results</b>		
1. Field Notes	Permanent	Continuing administrative and historical value
2. Benchmark Books	Permanent	Continuing administrative and historical value
<b>F. Photos, Aerials</b>	As long as administratively useful; appraise for permanent retention	Administrative value ends; possible historical value
<b>G. Profile and Grade Books</b>	Permanent	Continuing administrative and historical value
<b>H. Reports to City Council</b>		
1. Monthly	5 years	Administrative value ends
2. Annual	Permanent	Continuing historical value
<b>III. Planning &amp; Zoning Records</b>		
<b>A. Case Files</b>		
1. Zoning Variance Requests and Decisions	10 years after settlement	Administrative and legal value ends
2. Non-compliance Violations	10 years after settlement	Administrative and legal value ends
3. Decisions and Orders	Permanent	Continuing administrative, historical, and legal value

**Schedule 4: Public Works Records, continued**

Record Title	Retention Period	Reason
<b>B. Community Development</b>		
1. Urban Renewal, HUD Block Grant	See Capital Improvement Projects in this schedule	
2. Public Housing		
3. Applications, Correspondence, Records of Ineligibility, Determinations, Tenant Files	5 years after case closed	Administrative value ends. (Federal Register, Guide to Record Retention Requirements suggests 3 year retention.)
<b>C. General Planning (comprehensive plan, land use, open space, recreation, capital improvements, regional, transportation, etc.)</b>	As long as administratively useful; appraise for permanent retention	Administrative value ends; possible historical value
<b>D. Minutes of the Board or Commission</b>	Permanent	Continuing administrative and historical value
<b>E. Rosters of Previous Board or Commission Members</b>	Permanent	Continuing historical value
<b>F. Reports to City Council</b>		
1. Monthly	5 years	Administrative value ends
2. Annual	Permanent	Continuing historical value
<b>IV. Building Inspection Records</b>		
<b>A. Building/Site Plans</b>		
1. Residential	5 years	Administrative value ends
2. Commercial	Life of structure	Long-term administrative value
3. Rental	5 years	Administrative value ends
<b>B. Case Files, Board of Adjustment</b>	10 years after disposition	Administrative and legal value ends
<b>C. Inspection Records</b>		
1. Card or Address File	5 years	Administrative value ends
2. Reports	5 years	Administrative value ends
3. Log Books	Permanent	Continuing administrative and legal value
<b>D. License Records (electricians, plumbers, mechanical)</b>	60 years	Long-term administrative and legal value
<b>E. Minutes of the Board of Adjustment</b>	Permanent	Continuing administrative and historical value
<b>F. Permits (or application, whichever has most info; building, plumbing, heating, A/C, electrical, sewer, excavation, demolition, occupancy, street, sidewalk)</b>	Permanent	Continuing administrative value
<b>G. Reports to City Council</b>		
1. Monthly	5 years	Administrative value ends
2. Annual	Permanent	Continuing historical value

**Schedule 4: Public Works Records, continued**

Record Title	Retention Period	Reason
<b>V. Maintenance of Streets and Grounds</b>		
<b>A. Complaints</b>	5 years after disposition	Administrative value ends
<b>B. Daily Diaries or Logs</b> (appointment calendars, telephone or radio logs, task lists, etc.)	5 years	Administrative value ends
<b>C. Equipment</b>		
1. Inventories	While current	Administrative value ends
2. Maintenance	Life of equipment	Administrative value ends
3. Cost of Operation Summaries	5 years	Administrative and fiscal value ends
<b>D. Purchasing</b>	See Schedule 2, Financial Records (Accounts Payable)	
1. Fuel Consumption Records	5 years	Fiscal value ends
2. Fuel, Gravel, Sand, Hauling, etc.	5 years	Fiscal value ends
<b>E. Reports to City Council</b>		
1. Monthly	5 years	Administrative value ends
2. Annual	Permanent	Continuing historical value
<b>F. Work Orders</b>	5 years	Administrative value ends

## Schedule 5: Fire Department Records

Record Title	Retention Period	Reason
<b>A. Blueprints of Commercial Buildings</b>	As long as administratively useful	Administrative value ends
<b>B. Daily Diaries or Logs (appointment calendars, activity, radio, phone)</b>	5 years	Administrative value ends
<b>C. Equipment Records</b>		
1. Inventories	5 years	Administrative value ends
2. Maintenance and Testing	5 years	Administrative value ends
<b>D. Inspection Records</b>		
1. Card File or Log Book with Results, Violations, Corrections	Life of structure	Administrative and legal value ends
2. Inspector Books, Copies of Inspection Certificates	5 years	Administrative value ends
<b>E. Iowa Incident Reports</b>	Permanent	Continuing administrative and historical value
<b>F. Investigation Files</b>		
1. Arson	Permanent	Continuing administrative and legal value
2. Fire Deaths	Permanent	Continuing administrative and legal value
<b>G. Log Book of Fires</b>	Permanent	Continuing administrative and historical value
<b>H. Maps of Area Served</b>	As long as administratively useful	Administrative value ends
<b>I. Miscellaneous Vehicle Run Reports</b>	5 years	Administrative value ends
<b>J. Roll Call or Minute Books</b>	Permanent	Continuing historical value
<b>K. Reports to City Council</b>		
1. Monthly	5 years	Administrative value ends
2. Annual	Permanent	Continuing historical value
<b>L. Rural Township Contracts</b>	5 years after expiration	Administrative and legal value ends
<b>M. Photos, Department History</b>	Permanent	Continuing historical value
<b>N. State Fire Marshal's Statistics</b>	As long as administratively useful	Administrative value ends

## Schedule 6: Parks and Recreation Records

Record Title	Retention Period	Reason
<b>A. General</b>		
1. Contracts, Agreements (concessions, services, equipment, personnel, facility use, projects)	10 years after expiration	Administrative and legal value ends
2. Minutes of the Board or Commission	Permanent	Continuing administrative and historical value
3. Facilities, Buildings, Other Structures	Life of building or until sold	Administrative value ends
4. Equipment (inventories, maintenance)	Until equipment retired	Administrative value ends
5. Facilities, park maintenance, pesticide applicator licenses	5 years minimum	Administrative value ends
<b>B. Miscellaneous Records</b>		
1. Program Files (class lists, rosters, scorebooks, permission slips)	5 years	Administrative value ends
2. Reservation Records (shelter houses, facilities, building spaces, etc.)	5 years	Administrative value ends
3. State Sales Tax Return	5 years	Fiscal value ends
4. Promotional Materials	5 years; appraise for permanent retention	Possible historical value
5. Photos, Park History	Permanent	Continuing historical value
<b>C. Swimming Pools, Golf Courses, and Other Enterprises that Charge Admission</b>		
1. Daily Cash Receipts, Cash Register Tapes, Deposit Slips	5 years	Fiscal value ends
2. Record of Season Ticket Sales	5 years	Fiscal value ends
3. User Statistics	5 years	Administrative value ends
4. Department of Public Health Water Quality Tests	5 years	Administrative value ends
5. Material Safety Data Sheets	30 years after last use	OSHA requirement; administrative value ends
<b>D. Reports to City Council</b>		
1. Monthly	5 years	Administrative value ends
2. Annual	Permanent	Continuing historical value

## Schedule 7: Airport Records

Record Title	Retention Period	Reason
<b>A. Contracts or Leases</b>	10 years after expiration	Administrative value ends
<b>B. Correspondence with Regulatory Agencies, FAA or Iowa DOT (inspections, certification, correction of violations, etc.)</b>	As long as administratively useful or until issue resolved; appraise for permanent retention	Administrative value ends; possible historical value
<b>C. Facilities</b>		
1. Land	See Schedule 1, Administrative and Legal Records, Title Documents	
2. Buildings, Runways, Other Structures	See Schedule 1, Administrative and Legal Records, Title Documents	
3. Equipment (inventories, maintenance)	See Schedule 1, Administrative and Legal Records, Title Documents	
<b>D. Master Plans (5-10 year projections)</b>	Until superseded; appraise for permanent retention	Administrative value ends; possible historical value
<b>E. Minutes of the Board or Commission</b>	Permanent	Continuing administrative and historical value
<b>F. Reports to City Council</b>		
1. Monthly	5 years	Administrative value ends
2. Annual	Permanent	Continuing historical value

## Schedule 8: Library Records

Record Title	Retention Period	Reason
<b>A. Circulation Records</b>	5 years	Administrative value ends
<b>B. Contracts for Service with Other Entities</b>	10 years after expiration	Administrative value ends
<b>C. Minutes of the Board or Commission</b>	Permanent	Continuing administrative and historical value
<b>D. Purchasing</b>	See Schedule 2, Financial Records, Accounts Payable	
<b>E. Reports to City Council</b>		
1. Monthly	5 years	Administrative value ends
2. Annual	Permanent	Continuing historical value
<b>F. Report to State Library Commission</b>	Permanent	Continuing historical value

## Schedule 9: Housing Records

Record Title	Retention Period	Reason
<b>A. Planning</b>		
1. Commercial Site Plans	180 days after completion of permitted work	International Building Code
2. Subdivision Plans	5 years after last final plat approval	Administrative value ends
3. PUD, P-C, P-1 Plans	Permanent	Continuing administrative and historical value
4. LUPP Requests	5 years	Administrative value ends; possible historical value
5. Neighborhood Planning (sub-area plans, neighborhood liaison activities)	5 years minimum	Administrative value ends; possible historical value
6. Historic Preservation Files	Permanent	Continuing administrative and historical value
7. Permitted Home Occupation Files	Permanent	Continuing administrative and historical value
<b>B. Affordable Housing</b>		
1. Home Buyer Files (applications, HUD settlement statements, purchase agreements, racial/ethnic documentation, rehabilitation contracts, and documentation)	7-30 years or until the property is sold	Administrative value ends
2. Grant Program Files (quarterly reports, monthly reports, close-out documents for audits)	5-year minimum after program completion and audit	Administrative value ends
3. Annual	Permanent	Continuing historical value

## Schedule 10: Police Records

Record Title	Retention Period	Reason
<b>A. Permits</b>		
1. Noise Permits	5 years	Administrative value ends
2. Keg Permits	5 years	Administrative value ends
<b>B. Personnel</b>		
1. Staff Meeting Minutes and Index	Permanent	Continuing administrative value
2. Personnel Records (discipline, demotion, promotion, awards)	60 years	Fiscal value ends (satisfies the long-term need for future salary and pension inquiries)
3. Personnel Training Records	5 years after termination of employment	Administrative value ends
4. Significant Exposure and Insignificant Exposure Reports	Permanent	Continuing administrative value
5. Internal Affairs Investigations	Permanent	Continuing administrative value
6. Grievances/Responses	Permanent	Continuing administrative value
7. Outside-event Overtime Requests, Assignments, Billings	5 years	Administrative value ends
8. Policies and Procedures Manuals and Updates	Permanent	Continuing historical value
9. Detective Division Policies and Procedures Manual and Updates	Permanent	Continuing historical value
10. Field Training Officers Manual and Updates	Permanent	Continuing historical value
11. Dispatchers Policies and Procedures Manual and Updates	Permanent	Continuing historical value
12. Liability Release Forms	Permanent	Continuing historical and legal value
<b>C. Records and Reports</b>		
1. Studies/Surveys	5-year minimum, as long as administratively useful	Administrative value ends
2. Arrest Book	Permanent	Continuing administrative value
3. Trip Cards	7 years	Administrative value ends
4. State of Iowa Grant Reports	5-year minimum, depending on grant requirements	Administrative value ends
5. Federal Government Grant Reports	5-year minimum, depending on grant requirements	Administrative value ends
6. Investigation Reports	Permanent	Continuing historical value
7. Accident Reports	Permanent	Continuing historical value
8. Pawn Records	7 years	Administrative value ends
9. Arrest Records	Permanent (hard copy)	Continuing historical value
<b>D. Accounting and Payroll</b>		
1. Department Employee Time Records	5 years	Administrative value ends
2. Department Accounting and Payroll Records	5 years	Administrative value ends

## Schedule II: Engineering Records

Record Title	Retention Period	Reason
1. Annexation Maps	Permanent	Continuing administrative and historical value
2. Plats of City-Owned Property and Easements Granted to the City	Permanent	Continuing administrative and historical value
3. Topography, Flood Plain Maps	Permanent	Continuing administrative and historical value
4. Utility Location Maps and Plats	Permanent	Continuing administrative and historical value
5. As-Built and Drawings of City Buildings, Streets, and Supporting Infrastructure	Permanent	Continuing administrative and historical value
6. Capital Improvement Project Specifications	Maintaining for the life of the bond or loan if the project was funded, or for 5 years after project completion if it was not funded by a loan or bond.	Administrative and fiscal value ends
7. Capital Improvement Project Files	Maintaining for the life of the bond or loan if the project was funded, or for 5 years after project completion if it was not funded by a loan or bond.	Administrative and fiscal value ends
8. Survey Notes	Permanent	Continuing administrative and historical value
9. Benchmark Books	Permanent	Continuing administrative and historical value
10. Material Safety Data Sheets	30 years after the last usage	OSHA requirement; administrative value ends
11. Nuclear Density Gauge Logs	Permanent	Permit requirement
12. Studies/Surveys	5 years	Possible historical value; appraise for permanent retention
13. Complaints	5 years after settlement	Administrative value ends
14. Daily Diaries or Logs (appointment calendar, activity, radio, phone)	5 years	Administrative value ends
15. Correspondence with Regulatory Agencies (inspections, certification, correction of violations)	5 years/permanent if correspondence serves as certification or evidence of correction of violations	Administrative value ends; appraise for possible historical value
16. Master Plans (5-10 year projections)	Permanent	Continuing historical value

## Schedule 12: Transit Records

Record Title	Retention Period	Reason
<b>A. Equipment and Maintenance</b>		
1. Inventories	While current	Administrative value ends
2. Leases	Life of equipment	Fiscal value ends
3. Fuel Consumption	Permanent	Continuing fiscal value
4. Cost of Operation	Permanent	Continuing administrative and historical value
5. Underground Tanks, Registration and Insurance	Permanent	Continuing administrative and fiscal value
<b>B. Maps</b>		
1. Time Schedules and Route Maps	Permanent	Continuing administrative and historical value
<b>C. Promotional Materials (pamphlets, brochures)</b>	Permanent	Continuing administrative and historical value
<b>D. Financial Records and Reports</b>		
1. Quarterly Reports	5 year minimum	Administrative value ends
2. Fuel Tax Reports	5 year minimum	Fiscal value ends
3. DBE/WBE Report	5 year minimum	Administrative value ends
4. Operating Grants	Life of structure, not less than 5 years	Fiscal value ends
5. Odometer Readings	Life of equipment	Administrative value ends
6. Time Sheets	5 years	Fiscal value ends
7. Material Safety Data Sheets	30 years after the last usage	OSHA requirement; administrative value ends
8. Claims for Refunds of State Fuel Tax	5 years	Fiscal value ends

## Schedule 13: Electric Utility Records

Record Title	Retention Period	Reason
<b>I. Electric Administration, Engineering and Plant Controls</b>		
<b>A. State and Federal Reports</b>		
1. EIA 412 – Annual Report of Public Electric Utilities	5 years	Administrative value ends; appraise for possible historical value
2. EIA 767 – Steam-Electric Plant Operation and Design Report	5 years	Administrative value ends; appraise for possible historical value
3. EIA 860 – Annual Electric Generator Report	5 years	Administrative value ends; appraise for possible historical value
4. EIA 861 – Annual Electric Power Report	5 years	Administrative value ends; appraise for possible historical value
5. Iowa Department of Revenue Annual Report of Transmission Lines and Equipment	5 years	Administrative value ends; appraise for possible historical value
6. Form ME-1 – Iowa Utilities Board Annual Report	5 years	Administrative value ends; appraise for possible historical value
<b>B. Iowa Utilities Board</b>		
1. Annual Inspection	5 years	Administrative value ends; appraise for possible historical value
<b>C. FCC Radio License</b>		
	5 years	Administrative value ends; appraise for possible historical value
<b>D. Licenses and Permits, State and Federal</b>		
1. Iowa Dept of Public Health Materials License	5 years	Administrative value ends; appraise for possible historical value
2. Continuous Emission Monitoring	5 years	Administrative value ends; appraise for possible historical value
3. Iowa DNR Permits	5 years	Administrative value ends; appraise for possible historical value
4. US EPA Permits	5 years	Administrative value ends; appraise for possible historical value
5. Iowa Utility Board Permits	5 years	Administrative value ends; appraise for possible historical value
<b>E. Distribution System</b>		
1. Electric Distribution Maps	Permanent	Continuing administrative value
2. Electric Switching Maps	Permanent	Continuing administrative value
<b>F. Security Lights, Rental Agreements</b>		
	Life of agreement, not less than 5 years	Continuing administrative value
<b>G. Miscellaneous</b>		
1. Iowa One Call Locates	7 years	Legal value ends
2. Primary Switching Log and Tags	Permanent	Continuing legal and historical value
3. Safety Glasses and Safety Footwear	7 years	Administrative and fiscal value ends
4. Siren Tests	7 years	Administrative value ends

## Schedule 13: Electric Utility Records, continued

Record Title	Retention Period	Reason
5. Job Orders (active)	Until completed, not less than 5 years	Administrative and fiscal value ends
6. Job Orders (completed)	Permanent	Continuing historical value
7. Maps	Permanent	Continuing historical value
8. Tree Trimming Maps/Permit Cards	7 years	Administrative, fiscal, and historical value
9. Material Safety Data Sheets	30 years after the last usage	OSHA requirement; administrative value ends
10. Disposal Record of Material from Truck Bay Pits	Permanent	Continuing legal value
<b>H. Inventory</b>		
1. Poles	Permanent	Continuing fiscal and historical value
2. Transformers	Permanent	Continuing fiscal and historical value
3. Job Issues	Permanent	Continuing fiscal and historical value
4. Material in Stock	While current	Administrative and fiscal value
5. Inventory Records	5 years	Fiscal, historical, and legal value ends
<b>I. Inspection/Maintenance Documents/Reports</b>		
1. OH Switch Maintenance	7 years	Administrative value ends
2. PCB Test Reports	Permanent	Continuing historical and legal value
3. Cap Bank Maintenance/Inspection	5 years	Administrative value ends
4. Tools	As long as possessed, not less than 5 years	Administrative value ends
5. OH Line Inspection	5 years	Historical and legal value ends
6. UG Line Inspection	5 years	Historical and legal value ends
7. Infrared Inspection	5 years	Historical and legal value ends
8. Equipment	As long as possessed, not less than 5 years	Administrative value ends
9. Fire Extinguisher Inspection	Permanent	Continuing legal value
10. Sling Inspections	Permanent	Continuing legal value
11. High-Voltage Testing (hot sticks and cover-up)	Permanent	Continuing legal value
12. Fork-Lift Inspection	As long as possessed, not less than 5 years	Historical and legal value ends
13. High-Voltage Testing of Substation Hot Sticks	Permanent	Continuing legal value
14. Miscellaneous Building Maintenance Records	Permanent	Continuing historical value

## Schedule 13: Electric Utility Records, continued

Record Title	Retention Period	Reason
<b>II. Electric Production Records</b>		
<b>A. Operations and Maintenance</b>		
1. Generation and Output Logs (monthly meter logs)	6 years	Federal Energy Regulatory Commission (17,704, 125.3)
2. Recording Charts	5 years	Federal Energy Regulatory Commission Regulations
<b>B. Payroll</b>		
1. Semi-Monthly Pay Sheets	5 calendar years	Administrative and legal value ends
<b>C. Records</b>		
1. Record of Unclaimed Deposits	3 years	Iowa Administrative Code, 199-20.4(8)
2. Customer Billing Records	3 years	Iowa Administrative Code, 199-20.4(13)
3. Meter Test Records	3 years after retirement of meter	Iowa Administrative Code, 199-20.6
4. Volunteer Records	2 years	Iowa Administrative Code, 199-20.7(7)
<b>D. OSHA Safety Programs</b>		
1. Written Programs	5 years	Administrative and legal value ends
2. Training Records	5 years	Administrative and legal value ends
3. Canceled Confined Space Entry Permits	5 years	Administrative and legal value ends
4. Portable Fire Extinguisher Inspections	5 years	Administrative and legal value ends
5. Ladder Inspections	5 years	Administrative and legal value ends
6. Sling Inspections	5 years	Administrative and legal value ends
7. Monthly Respirator Inspection Forms	5 years	Administrative and legal value ends
8. Material Safety Data Sheets	30 years after last usage	OSHA requirement; administrative value ends

## Schedule 14: Water Utility Records

Record Title	Retention Period	Reason
<b>A. General</b>		
1. Minutes of the Board or Commission	Permanent	Continuing administrative and historical value
2. Capital Improvement Projects	See Schedule 4, Public Works Records, Capital Improvement Projects	
a. Records relating to state and federal funding of planning and/or construction of water and wastewater facilities (correspondence, grant applications, approvals, wage determinations, adjustments)	5 years after completion	Administrative value ends
b. Records relating to the construction of wastewater treatment facilities (applications, permits, amendments, blueprints, complaints, investigations, reports, Municipal Operation Permits)	Permanent	Continuing administrative value
3. Operator's Certification	Length of employment	Administrative and legal value ends
4. Valuations	Permanent	Continuing administrative, fiscal, and historical value
5. Rate Surveys		
a. Monthly	3 years	Administrative value ends
b. Annual	Permanent	Continuing historical value
6. Report to Iowa Department of Revenue	5 years	Administrative and fiscal value ends

## Schedule 14: Water Utility Records, continued

Record Title	Retention Period	Reason
<b>B. System, Plant and Equipment</b>		
1. Blueprints or Plans of Plant and System	Permanent	Continuing administrative and historical value
2. Inventories (elevated water tanks, wells, pumps, engines, reservoirs, dams, pump stations, etc.)	While current	Administrative value ends
3. Equipment Records (water towers, wells, pumps, engines, tanks, reservoirs, dams, etc.)		
a. Inventories	While current	Administrative value ends
b. Maintenance History	Life of equipment	Administrative value ends
c. Depreciation	Life of equipment	Fiscal value ends
4. Maps of System	Permanent	Continuing administrative and historical value
5. Meter Records (location, testing, maintenance)	2 consecutive periodic tests or 2 years; if record made at retirement, retain for 3 years	Iowa Administrative Code, 199-21.6(9); administrative value ends
6. Record of Ys	Permanent	Continuing administrative value
7. Valve Records	Permanent	Continuing administrative value
8. Water and Sewer Tap Records	Permanent	Continuing administrative value
<b>C. Operations</b>		
1. Logs Indicating Pumping, Hours, Gallons, Chemicals Added, Maintenance, Testing	6 years	Administrative value ends
2. Recording Instrument Charts	5 years	Administrative value ends
3. Records Relating to Operations, Including Correspondence, Permits (NPDES, pretreatment, disposal water/wastewater sludge, water supply, historical consumption, usage records, trouble calls)	Permanent	Continuing historical and future projection value
4. Lab Records Supporting Lab Certification	7 years	Administrative value ends
5. IDNR Summary of Bacterial Analysis	7 years	Administrative value ends
6. Water Supply Monthly Operations Report	7 years	Administrative value ends
7. Operations Permits	Permanent	Continuing administrative value

## Schedule 14: Water Utility Records, continued

Record Title	Retention Period	Reason
<b>D. Water Treatment</b>		
1. Bacteriological Analysis	5 years	US EPA, 40 CFR 141.33. Administrative value ends.
2. Chemical Analysis	10 years	US EPA, 40 CFR 141.33. Administrative value ends.
3. Actions Taken to Correct Violations of Primary Drinking Water Regulations	5 years	US EPA, 40 CFR 141.33. Administrative value ends.
4. Copies of Reports Relating to Sanitary Surveys of System	10 years	US EPA, 40 CFR 141.33. Administrative value ends.
5. Records Relating to Variances or Exemptions	5 years after expiration	US EPA, 40 CFR 141.33. Administrative value ends.
6. Record of Residuals Analysis and Disposal	5 years	US EPA, 40 CFR 141.33. Administrative value ends.
7. Flood Prediction and Monitoring Data	Permanent	Continuing historical and future projection value
8. Groundwater Level Monitoring Data	Permanent	Continuing historical and future projection value
<b>E. Billing and Customer Services Records</b>		
1. Application Forms for Hydrant Meters and Unauthorized Use of Water (without meter)	5 years	Administrative value ends
2. Job Orders	5 years	Administrative value ends
3. Complaints	5 years	Iowa Administrative Code, 199-21.4(10). Administrative value ends.
<b>F. Meter Records</b>		
1. Meter Testing and Maintenance Records (meter cards)	5 years after the retirement of meter	Administrative value ends
2. Meter Location Records (address cards)	Permanent	Continuing historical value

## Schedule 14: Water Utility Records, continued

Record Title	Retention Period	Reason
<b>G. Cross-Connection Control Records</b>		
1. Facility/Customer Records (device test and facility survey forms; notifications for the need for containment, testing, and noncompliance; assembly information and test log)	Permanent	Continuing administrative and historical value
2. Wastewater Treatment (record of monitoring activities and results)	3 years	Iowa Administrative Code, 567-63.2(3). Administrative value ends.
3. Billing and Customer Service Records		
a. Applications, Certifications, or Permits for Hook-up, Initiation of Service or Discontinuation of Service	3 years	Administrative value ends
b. Contracts for Service	1 year after expiration	Administrative value ends
c. Rate Schedules and Descriptions of Rate Computations	50 years	Administrative value ends
d. Job Orders	3 years	Administrative value ends
e. Complaints	3 years	Iowa Administrative Code, 199-21.4(10). Administrative value ends.
f. Meter Readings	See Iowa Administrative Code, 199-21.6(9)	Iowa Administrative Code, 199-21.6(9). Administrative value ends.
g. Billing Records		
1) Stubs	5 years	Fiscal value ends
2) Receipts	5 years	Fiscal value ends
3) Daily Receipt Tabulations	5 years	Fiscal value ends
4) Cash Books (journals)	5 years	Fiscal value ends
5) Ledgers	5 years	Fiscal value ends
6) Summaries of Usage and Billing	5 years	Fiscal value ends
7) Delinquent Account Lists	5 years	Fiscal value ends
8) Bad Debt Write-Offs	5 years	Fiscal value ends
9) Adjustment Postings or Books	1 year	Fiscal value ends
10) Records of Customer Deposits and Refunds	7 years after the abandonment of service	Fiscal value ends
11) Record of Unclaimed Refunds	1 year	Code of Iowa, 556.4. Legal and fiscal value ends.

## Schedule 15: Gas Utility Records

Record Title	Retention Period	Reason
<b>A. Gas Utilities</b>	In general, gas utilities shall preserve records in accordance with the provisions of Part 225 of the Federal Power Commission Rules, 18 CFR 225	Iowa Administrative Code, 199-18.6(2)
1. Record of Unclaimed Deposits	2 years	Iowa Administrative Code, 199-19.4(8)
2. Customer Billing Records	5 years	Iowa Administrative Code, 199-19.4(13)
3. Meter Records (name of the manufacturer, number, type, capacity, multiplier, constants, pressure rating, dates of installation and removal, testing)	3 years after the retirement of the meter; before meter's retirement, retain last 2 tests	Iowa Administrative Code, 199-19.6
4. Pressure Surveys and Records	2 years	Iowa Administrative Code, 199-19.7(3)

**ORDINANCE #241**

**AN ORDINANCE AMENDING THE CODE OF ORDINANCES OF THE CITY OF ATKINS, IOWA, BY ADDING NEW SUB-SECTIONS TO CHAPTER 69.07 PARKING REGULATIONS**

**BE IT ENACTED** by the City Council of the City of Atkins, Iowa:

Section 1. CHAPTER MODIFIED. Chapter 69 "Parking Regulations" of the Code of Ordinances of the City Atkins, Iowa, is hereby amended by adding the following new sub-sections (19 and 20) to Section 69.07:

69.07 Parking Prohibited. No one shall stop, stand, or park a vehicle in any of the following specifically designated no parking zones, except when necessary to avoid conflict with other traffic or in compliance with the direction of a peace officer or traffic control signal.

69.19 Temporary No-Parking. The Public Works Director and the City Administrator each may, upon application and good cause being shown therefor, authorize temporary no parking upon those streets which are under the jurisdiction of the City and for such time period as deemed appropriate by them. Any such temporary no parking shall be designated by a posted sign.

69.20 Parking of Vehicles on Residentially Zoned Property. Other than for temporary purposes of loading and unloading; vehicles, recreational vehicles, boats, and trailers, shall not be parked or stored within the front yard, or street side yard, of a residentially zoned lot unless situated on a "permitted" paved driveway. Gravel is not permitted. In the case of an existing residential driveway that was unpaved at the time of the passage of this Ordinance, parking is allowed on such unpaved driveway until such time as site improvements are made which require the driveway to be paved. Recreational vehicles, including boats and trailers, may be parked or stored within the interior side yard or rear yard of a residential lot or within an enclosed garage. Vehicles or trailers of any kind or type without current license plates shall not be parked or stored on any lot other than in completely enclosed buildings.

SECTION 2. SEVERABILITY CLAUSE. If any section, provision, or part of this ordinance shall be adjudged invalid or unconstitutional, such adjudication shall not affect the validity of the ordinance as a whole or any section, provision, or part thereof not adjudged invalid or unconstitutional.

SECTION 3. WHEN EFFECTIVE. This ordinance shall be in effect from and after its final passage, approval, and publication as provided by law.

Passed and Approved by the Mayor and City Council on \_\_\_\_\_, 2026.

\_\_\_\_\_  
Brian Cruise, Mayor

Attest:

\_\_\_\_\_  
Shelley Annis, City Clerk/Treasurer  
First Reading: May 12, 2026  
Second Reading: May 26, 2026  
Third Reading: May 26, 2026

I certify that the foregoing was published as Ordinance #241 on the 26<sup>th</sup> day of May, 2026.

\_\_\_\_\_  
Shelley Annis, City Clerk

#### CLERK'S CERTIFICATE

I, Shelley Annis, City Clerk of the City of Atkins, Iowa, hereby certify that the Ordinance Amending the Code of Ordinances of the City of Atkins, Iowa, by amending provisions pertaining to Chapter 69 "No Parking" was adopted by the City Council of the City of Atkins, Iowa, and that Ordinance #241, was passed by the City Council of the City of Atkins, Iowa, on the -- day of ---, 2026, signed by the Mayor on the --day of --, 2026; duly recorded and published as provided by law, and that the effective date of said Code is --, 2026.

Witness my hand and official seal of the City of Atkins, Iowa, this \_\_\_\_ day of \_\_\_\_\_, 2026.

Signed

\_\_\_\_\_  
Shelley Annis, City Clerk/Treasurer

# The City of *Atkins*

~~Settled 1882~~    ~~Incorporated 1917~~



**Mayor:**

Brian Cruise

**Council:**

David Fisher  
Trevor Dursky  
Kevin DeMeulenaere  
Bob Stolen  
Jeremy Rolando

**City Administrator:**

Scott Flory  
sflory@cityofatkins.org

**City Clerk/Treasurer:**

Shelley Annis

**Utility Clerk:**

Marissa Stangl

**Public Works**

**Director:**

David Schrier

**Public Works Dept:**

Jarrod Tomlinson  
Mike Rammelsberg

**Fire Chief:**

Dan Rammelsberg

**Library Director:**

Pamela Duball

May 8, 2026

To: Scott Flory, City Administrator  
From: David Schrier, Public Works Director  
Re: Construction of new City sidewalk at 500 Cardinal Avenue

Dear Scott:

As you requested, I have solicited and received competitive quotes from contractors to construct a new City sidewalk along the detention pond on 500 Cardinal Avenue, which is City-owned Property.

This sidewalk will connect from the daycare driveway at 402 Cardinal Ave to the existing sidewalk at 504 Cardinal Ave. There will also be an ADA ramp in line with the existing ADA ramp across the road on Driftwood Lane.

The work would entail construction of approximately 226 lineal feet of sidewalk, 5 foot wide, 4" thick with rebar, including the ADA ramp which will be approximately 5 ft x 7 ft x 11 ft long.

I received two quotes for this project.

JDM from North Liberty, IA, quoted the work at \$8,650.75. At the time of quote, JDM was out 8-10 weeks for a start date.

Wirtanen from Atkins, IA, quoted the work at \$7,950.00. At the time of quote, Wirtanen was within a month for a start date.

Wirtanen having submitted the least costly quote for the work and able to proceed with the project more quickly would be my recommendation to be awarded the job.

Thank You



**AMENDED RESOLUTION NO. \_\_\_\_\_**

**A RESOLUTION AMENDING RESOLUTION NO. 2025-10-02 APPROVING THE PRELIMINARY PLAT AND FINAL PLAT FOR KOOPMAN HOLDING 2ND ADDITION**

WHEREAS, Koopman Holdings 2<sup>nd</sup> Addition, 84 Northview Avenue, Atkins, Iowa, 52206, has submitted a Preliminary and Final Plat for Koopman Holdings 2<sup>nd</sup> Addition; and

WHEREAS, the proposed Preliminary and Final Plat for Koopman Holdings 2<sup>nd</sup> Addition consists of a replating of Outlot "A", as identified in Koopman Holding 1<sup>st</sup> Addition into Lots 1 and 2 and no City utilities are proposed as part of the plat; and

WHEREAS, the City's consulting civil engineer and the Atkins City Administrator have heretofore reviewed the Plat and all necessary documents and reaffirm their respective recommendations of approval of the Amended Resolution of said preliminary and final plat; and

WHEREAS, the Atkins Planning & Zoning Commission heretofore met and recommended approval of the Preliminary and Final Plat for Koopman Holdings 2<sup>nd</sup> Addition; and

WHEREAS, as the deadline to record the documents is now past the required 120-day deadline, following approval, for various reasons.

NOW, THEREFORE, BE IT RESOLVED, the City Council of the City of Atkins, Iowa, hereby reaffirms its acceptance of the recommendation of the Planning & Zoning Commission and the City Engineer and deems it appropriate to authorize and approve a Resolution amending Resolution No. 2025-10-02 Approving Preliminary Plat and Final Plat for Koopman Holdings 2<sup>nd</sup> Addition.

PASSED AND APPROVED this 12<sup>th</sup> day of May, 2026.

\_\_\_\_\_  
Brian Cruise, Mayor

Attest:

\_\_\_\_\_  
Shelly Annis, City Clerk/Treasurer

**REGULAR CITY COUNCIL MEETING MINUTES  
CITY OF ATKINS, IOWA**

The Atkins City Council met in regular session on Tuesday, April 28, 2026, at 6:00 p.m., in the Community Room, at City Hall, with Mayor Brian Cruise presiding. Council members present were: Rolando, Dursky, Stolen, and DeMeulenaere. Absent: Council Member David Fisher and City Clerk Shelley Annis. Also present: City Administrator Scott Flory.

Meeting was called to order by Mayor Brian Cruise. Motion was made by Rolando, seconded by DeMeulenaere, to approve the agenda. Passed Unanimously.

Mayor Cruise announced that it was now the time and place for public comments. Bethany Hantz (412 Pleasant Hill Drive, Atkins), candidate for Benton County Board of Supervisors and Joy Wieditz (1011 C Ave, Vinton) candidate for Benton County Treasurer each addressed the Council regarding their respective candidacies for elective office in the June 2026 primary.

Motion was made by Stolen, seconded by Dursky, to approve the final reading of Ordinance #240, "An Ordinance amending the Code of Ordinances of the City of Atkins, Iowa, by adopting provisions pertaining to Water Meters". Roll Call: Passed Unanimously.

Motion was made by Stolen, seconded by Dursky, to take the request from the Atkins Community Club off the table. Passed Unanimously. Motion was made by Stolen, seconded by Rolando, to approve Resolution 2026-04-03, "A Resolution approving the leasing of property to the Atkins Community Club for 2026 Watermelon Days". Roll Call: Passed Unanimously.

City Administrator Scott Flory reviewed the proposal to amend the FY 2026 City budget (#2). He advised notice was published in the newspaper and that the City had not received any written comments. Mayor Cruise opened the public hearing at 6:16 p.m. and there being no public comment closed the public hearing at 6:16 p.m. Motion was made by Stolen, seconded by Dursky, to approve Resolution 2026-04-06, "A Resolution approving Fiscal Year 2026 budget amendment (#2) for the City of Atkins, Iowa". Roll Call: Passed Unanimously.

Motion was made by Stolen, seconded by Dursky to approve the consent agenda, which included: April 23, 2026, City Council Meeting Minutes (special & workshop); approval of the bills & claims as submitted by the City Clerk; Class "B" Retail Alcohol Permit for Dollar General (402 Stonebrook Drive) (change of ownership); and Memorandum of Understanding with the State Dept of Revenue and the City of Atkins regarding the State Setoff Program

There being no further business to come before the Council, motion by Stolen, seconded by DeMeulenaere to adjourn the meeting at 6:33 p.m. Passed Unanimously.

\_\_\_\_\_  
Brian Cruise, Mayor

Attest:

\_\_\_\_\_  
Scott Flory, City Administrator

**CITY OF ATKINS, IOWA**  
**PAVILION RENTAL APPLICATION & AGREEMENT**

*The City of Atkins Park Pavilion is located at 320 2nd Ave, Atkins, IA 52206. There is a full kitchen: two refrigerators with freezers above, microwave, electric stove with oven. There are a male and female restrooms, heat and A/C, Wi-Fi, there are 10 tables and 64 chairs*

**APPLICANT INFORMATION**

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*A copy of the applicant's driver's license will be taken at the time of reservation.*

**Applicant Name:** \_\_\_\_\_

**Full Address (street, city, zipcode):** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Group / Organization (if applicable):** \_\_\_\_\_

**Purpose of Rental:** \_\_\_\_\_

**Date Requested:** \_\_\_\_\_

**Time:**  Full Day (8am-9pm)       Half Day (8am-2pm)       Half Day (3pm-9pm)

**Pavilion:**  Resident of Atkins (\$150.00/full day)     Non Atkins Resident (\$250.00/full day)

Resident of Atkins (\$100.00/half day)     Non Atkins Resident (\$150.00/half day)

*Proof of residency is required. Accepted items: Photo ID or Utility Bill.*

**TERMS & CONDITIONS**

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**1. Rental Period.** The pavilion is available for reservation as a full day or half day. Applicants must select one of the following time slots at the time of reservation:

- **Full Day:** 8:00 a.m. – 9:00 p.m.
- **Half Day (Morning/Afternoon):** 8:00 a.m. – 2:00 p.m.
- **Half Day (Afternoon/Evening):** 3:00 p.m. – 9:00 p.m.

All setup, decorating, and cleanup must be completed within the reserved time slot. Entering the pavilion before your reserved start time or remaining past your reserved end time will result in forfeiture of the full security deposit. Any deviation from the reserved time slot requires prior written approval from City staff.

**2. Pavilion Access.** All entry to the pavilion is managed through a keypad door code. A unique access code will be sent to the Applicant via phone or email by City Hall the day before the reserved date. The Applicant is responsible for ensuring all members of their party are aware of the access policy. The code is valid for the reserved date only and must not be shared beyond the renter's immediate party.

Entry before **your scheduled time** on the reserved date will result in **forfeiture of the full \$100.00 security deposit**, as the door system records a time-stamped log of all entries. No exceptions will be made.

**Video Surveillance.** The City of Atkins maintains video surveillance cameras on the pavilion premises for the safety and security of the facility and its users. By signing this Agreement, the Applicant acknowledges and consents to the presence of surveillance cameras and agrees that recorded footage may be used by the City to verify compliance with the terms of this Agreement, including but not limited to confirming entry and exit times.

**3. Reservations.** Reservations are accepted on a first-come, first-served basis. The City of Atkins reserves the right to refuse rental privileges to any person or group. The reservation is not confirmed until the rental fee, security deposit, signed agreement, and a copy of the applicant's driver's license have all been received.

**4. Rental Fees.** The rental fee is due at the time the application is submitted. If the application is not approved, the fee will be refunded. Rental fees are based on residency and the time slot selected, as follows:

**Full Day (8am–9pm) Half Day (8am–2pm or 3pm–9pm)**

**Atkins Resident** \$150.00                      \$100.00

**Non-Resident**    \$250.00                      \$150.00

Proof of Atkins residency is required at the time of reservation. Accepted forms of proof are a current **photo ID** or **utility bill** showing an Atkins address. If residency cannot be verified, the non-resident rate will apply.

**5. Security Deposit** The rental fee is due at the time of application. A security deposit of **\$100.00** is due no later than 7 days prior to the rental date. If the deposit is not received by that deadline, the reservation will be cancelled, and the rental fee will not be refunded. The deposit will be refunded within 14 days of the event if the facility is returned in satisfactory condition with all rules followed. Partial or full deductions will be made per the fee schedule on page 3.

**6. Cancellation & Refunds.** Cancellations more than 30 days before the event will receive a full rental fee refund. Cancellations within 30 days, or no-shows, forfeit the rental fee. The deposit is subject to deductions per the fee schedule regardless of cancellation timing.

**7. Non-Profit Organizations.** Qualified non-profit organizations are exempt from the standard rental fee, provided a **Non-Profit Annual Use Agreement** is completed with the City at the start of each calendar year. Rules and cleaning requirements outlined in this Agreement apply to all non-profit users without exception.

Non-profit organizations are divided into two categories:

- a) **City of Atkins Community-Based Organizations.** Non-profits that are based in and primarily serve the Atkins community are exempt from both the rental fee and the security deposit. However, if the organization fails to follow the rules or cleaning requirements on any occasion, the City reserves the right to require a standard security deposit for all future reservations for the remainder of the calendar year, or to prohibit future use entirely, at the City's discretion.
- b) **All Other Non-Profit Organizations.** Non-profits that do not qualify as Atkins community-based organizations are exempt from the rental fee but are required to pay the standard **\$100.00 security deposit** at the start of their Annual Use Agreement, subject to the same deposit fee schedule and refund policy as standard renters. Non-compliance with rules or cleaning requirements may result in prohibition from future use, at the City's discretion.

**8. Alcohol Policy. No liquor of any kind is permitted.** All applicable laws must be followed. The City assumes no liability for alcohol consumed at the facility. The Applicant shall indemnify and hold the City harmless from any related claims.

**9. Release & Indemnification.** The Applicant and all guests assume all risk of use. The Applicant shall indemnify, defend, and hold harmless the City of Atkins, its officers, and employees from any and all claims, damages, costs, or expenses arising from this rental. The City is not responsible for items left on the premises.

## RULES

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- No smoking anywhere in or around the building.
- No pets inside the pavilion. Service animals are permitted.
- No nails, tacks, staples, tape, or command strips on walls, doors, tables, or ceiling. No hanging items from the ceiling. No leaning heavy items against walls.
- No confetti or glitter inside the building.
- Do not remove any City property from the building.
- Tables should remain set up unless arranged otherwise with staff.

## CLEANING REQUIREMENTS

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- Wipe off all tables, chairs, counters, and appliances.
- Sweep all floors. Mop all floors in the event of spillage on the floor.
- Clean all restrooms — toilets, sinks, stall doors, floors, and garbage cans.
- Clean the kitchen — stovetop, counters, sink, obvious spills
- Drape any damp or wet towels over the counter or sink to dry. Do not take them home.
- Remove all trash from inside and outside the building. **All trash must be taken to the dumpster out front before leaving.** Break down cardboard and take it to the cardboard dumpster on the north side of the parking lot.
- Turn off all lights and fans — including restrooms. Close restroom doors.
- Lock all windows and doors. Tug exterior doors to confirm they are locked.

## DEPOSIT FEE SCHEDULE

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The following fees will be deducted from the security deposit for each violation. The City will notify the Applicant by phone if the deposit check is being deducted.

Violation	Fee
Not clean — tables, chairs, appliances, sinks, toilets, stall doors, kitchen counters, kitchen sink	\$25.00
Nails, tacks, staples, tape, or command strips used on walls/doors/ceiling/tables	\$25.00
Garbage left in pavilion or restrooms / not taken to dumpster	\$25.00
Lights and/or fans left on	\$25.00
Floors not swept. If there is a spill, it was not mopped up	\$25.00
Toilets and/or sinks not cleaned (including stall doors and floor)	\$25.00
Items hung from ceiling or leaned against walls causing marks	\$25.00
Lock all windows and doors. Tug exterior doors to confirm they are locked.	\$25.00
Lose the dumpster key	\$25.00
Early entry or late departure from scheduled time.	\$100.00 — full deposit
Damage to park property (assessed case-by-case)	Actual cost

**ACKNOWLEDGMENT & SIGNATURES**

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By signing below, the Applicant(s) confirm they have read this Agreement in its entirety and agree to be bound by all provisions. The City of Atkins is not responsible for items left on the premises.

\_\_\_\_\_ **Date:** \_\_\_\_\_  
*Applicant Signature*

\_\_\_\_\_ **Date:** \_\_\_\_\_  
*Second Applicant Signature (if applicable)*

**FOR CITY USE ONLY**

Approved: \_\_\_\_\_

\_\_\_\_\_ **Date:** \_\_\_\_\_  
*Staff Signature*

**Rental Fee Paid:** \_\_\_\_\_ **Check # / Cash:** \_\_\_\_\_

**Deposit Paid:** \_\_\_\_\_ **Check # / Cash:** \_\_\_\_\_



< CITY OF ATKINS

## Retail Tobacco License Review

CITY OF ATKINS

1209373800



Application Information

### Legal Ownership Information

Name of sole proprietor, partnership, corporation, LLC, or LLP : CASEYS MARKETING COMPANY

Type of ownership : Corporation

Primary office address : 1 SE CONVENIENCE BLVD ANKENY IA 50021-9672

Legal Ownership Phone : 515-381-4090

Legal Ownership Email : licensingteam@caseys.com

### Application Information

Sales and Use Permit Number : 307700823

Location Name : CASEY'S #4647

Location Phone Number : 319-317-2663

Location Address : 401 STONEBROOK DR ATKINS IA 52206-6323

Location Mailing Address : 1 SE CONVENIENCE BLVD ANKENY IA 50021-9672

Renewal : Yes

Start Date : 01-Jul-2026

End Date : 30-Jun-2027

License Fee : 75.00

Types of Sales : Over the Counter

Type of Establishment : Convenience store/gas station

Types of Products Sold : Cigarettes, Tobacco, Vapor Products, Alternative Nicotine Products

Do you intend to make retail sales to ultimate consumers? : Yes

Do you have other permits issued under Iowa Code chapter 453A at this retail location? If yes, provide permit number(s) in the next step: : No

## Ownership Details

Owner	Position	Single Line Address
FABER, SCOTT	Officer	6749 CARDIFF CT JOHNSTON
LARSEN, ERIC	Owner	4407 NW 5TH ST ANKENY IA 5
BEECH, DOUGLAS	Owner	729 NE BROOK HAVEN DR AN
CASEY'S GENERAL STORES, IN	Company	1 SE CONVENIENCE BLVD ANK
JOHNSON, BRIAN	Officer	9129 NW 73RD CIR JOHNSTOI
JAMES, SAMUEL	Owner	3204 NE AVERY DR ANKENY IA

## Suppliers List

A list of suppliers for cigarettes, tobacco, alternative nicotine, and vapor products must be included with all retail tobacco permit applications. Applicants may submit this information



May 7th, 2026

Honorable Mayor and City Council, City of Atkins, 480 3<sup>rd</sup> Ave, Atkins, Iowa 52206

RE: Atkins Fire Station  
Garling Construction Payment Application 16

Honorable Mayor and Council:

Following is our review of Payment Application 16 for the Atkins Fire Station dated April 4th, 2026.

Included in this Payment Application:

1. Work
  - a. General Requirements – Complete.
  - b. Sitework/Demo – Completion of site seeding.
  - c. Concrete – Complete.
  - d. Masonry – Complete.
  - e. Metals – Complete.
  - f. Woods & Plastics – Complete.
  - g. Thermal & Moisture – Complete.
  - h. Doors & Windows – Complete.
  - i. Finishes – Complete.
  - j. Specialties – Complete.
  - k. Furnishings – Complete.
  - l. Special Construction – Complete.
  - m. Mechanical – Complete.
  - n. Electrical – Completing generator installation.
2. Stored Materials
  - a. None.

Solum Lang Architects, LLC certifies the attached Payment Application.

Respectfully Submitted,

A handwritten signature in black ink that reads "Michael Fritz". The signature is written in a cursive, flowing style.

Michael Fritz  
*Intern Architect*  
SOLUM LANG ARCHITECTS, LLC

**APPLICATION AND CERTIFICATE FOR PAYMENT**  
AIA DOCUMENT G702

TO (OWNER): CITY OF ATKINS 408 3rd Ave Suite 2 Atkins, IA 52206  
 PROJECT: Atkins Fire Station  
 APPLICATION NO: 16 INVOICE NO: 003721  
 PROJECT NO: 54259 ARCHITECT PROJECT NO: ARCHITECT PROJECT NO: ARCHITECT  
 OWNER PO NO: 54259 OWNER PO NO: 54259  
 FROM: Michael J Svatosch Garling Construction, Inc. Belle Plaine, IA 52208  
 (CONTRACTOR) 1120 11th Street  
 ARCHITECT: Solum Lang Architects 1101 Old Marion Rd NE Cedar Rapids, IA 52402  
 CONTRACT FOR: General Construction  
 CONTRACT DATE: 1/21/2025  
 FROM: 4/1/2026  
 TO: 4/30/2026

Distribution to:  
 OWNER  
 ARCHITECT  
 LENDOR  
 GENERAL CONTRACTOR  
 CONSTRUCTION MANAGER  
 OTHER

**CONTRACTOR'S APPLICATION FOR PAYMENT**

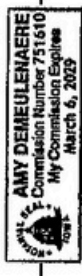
Application is made for Payment, as shown below, in connection with the Contract  
 Continuation Sheet, AIA Document G703, is attached.

Change Orders approved in previous months by Owner	APPROVED	DEDUCTIONS
Total	\$17,090.12	(\$781.82)
Approved this Month		
Number		
Date Approved		
<b>TOTALS</b>		
Net change by Change Orders		\$16,308.30

1. ORIGINAL CONTRACT SUM ..... \$3,376,000.00
  2. Net change by Change Orders ..... \$16,308.30
  3. CONTRACT SUM TO DATE (Line 1 + 2) ..... \$3,392,308.30
  4. TOTAL COMPLETED & STORED TO DATE ..... \$3,392,308.30  
 (Column J on G703)
  5. RETAINAGE:
    - a. 5.00% of Completed Work ..... \$169,615.41  
 (Column E + G on G703)
    - b. of Stored Material .....  
 (Column H on G703)
- Total Retainage (Line 5a + 5b or Total in Column M of G703) ..... \$169,615.41
6. TOTAL EARNED LESS RETAINAGE ..... \$3,222,692.89  
 (Line 4 less Line 5 Total)

7. LESS PREVIOUS CERTIFICATES FOR PAYMENT .....  
 (Line 6 from prior Certificate).....
8. CURRENT PAYMENT DUE ..... \$3,205,022.89  
 \$17,670.00
9. BALANCE TO FINISH, PLUS RETAINAGE ..... \$169,615.41  
 (Line 3 less Line 6)

State of: IA  
 Subscribed and sworn to before me this 13th day of April 2026  
 Notary Public: *Amy Demeulenaere*  
 My Commission Expires: 3-6-29



**AMOUNT CERTIFIED** ..... \$ 17,670.00  
 Seventeen Thousand Six Hundred Seventy Dollars and No Cents

**ARCHITECTS CERTIFICATE FOR PAYMENT**

In accordance with the Contract Documents, based on on-site observations and the data comprising the above application, the Architect certifies to the Owner that to the best of the Architect's knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the **AMOUNT CERTIFIED**.

ARCHITECT: *Michael Fritz* Solum Lang Architects Date: 05.07.2026  
 By: This certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

AIA Document G702, APPLICATION AND CERTIFICATE FOR PAYMENT, containing  
 Contractor's signed Certification is attached.  
 In tabulations below, amounts are stated to the nearest doll  
 Use Column L on Contracts where variable retainage for lin

1/21/2025  
 4/1/2026  
 4/30/2026

APPLICATION NO: 16  
 INVOICE NO: 003721  
 PROJECT NO: 54259  
 ARCHITECT PROJECT NO:

ITEM NO.	DESCRIPTION OF WORK	BILLING CODES	D		E		F		G			H		I		J		K		L		M	
			SCHEDULED VALUE	AMOUNT	PREVIOUS APPLICATION	AMOUNT	PERCENT COMPLETE	WORK IN PLACE	STORED MATERIALS	PERCENT COMPLETE	TOTAL COMPLETE AND STORED TO DATE	AMOUNT	COMPLETE	BALANCE	RETAINAGE								
1	<b>GENERAL REQUIREMENTS</b>																						
2	Bonds/Insurance		26,000.00	26,000.00	100%												26,000.00	100%				1,300.00	
3	PM/Supt/Admin		210,000.00	210,000.00	100%												210,000.00	100%				10,500.00	
4	Temp Facilities/Equip/Clean		24,000.00	24,000.00	100%												24,000.00	100%				1,200.00	
5	<b>SITework/DEMO</b>																						
6	Layout/SWPPP		24,000.00	24,000.00	100%												24,000.00	100%				1,200.00	
7	Mass Excavation		198,000.00	198,000.00	100%												198,000.00	100%				9,900.00	
8	Landscape/Retain Wall/Fence		20,000.00	19,000.00	95%	1,000.00											20,000.00	100%				1,000.00	
9	<b>CONCRETE</b>																						
10	Structural Concrete		235,000.00	235,000.00	100%												235,000.00	100%				11,750.00	
11	Site Paving		165,000.00	165,000.00	100%												165,000.00	100%				8,250.00	
12	Joint Seal/Stripping/Misc.		14,000.00	14,000.00	100%												14,000.00	100%				700.00	
13	<b>MASONRY</b>																						
14	Masonry		48,000.00	48,000.00	100%												48,000.00	100%				2,400.00	
15	<b>METALS</b>																						
16	Structural Steel Material		26,000.00	26,000.00	100%												26,000.00	100%				1,300.00	
17	Structural Steel Labor		55,000.00	55,000.00	100%												55,000.00	100%				2,750.00	
18	CFMF Material		44,000.00	44,000.00	100%												44,000.00	100%				2,200.00	
19	CFMF Labor		58,000.00	58,000.00	100%												58,000.00	100%				2,900.00	
20	<b>WOODS &amp; PLASTICS</b>																						
21	Framing		32,000.00	32,000.00	100%												32,000.00	100%				1,600.00	
22	Finishes		10,000.00	10,000.00	100%												10,000.00	100%				500.00	
23	<b>THERMAL &amp; MOISTURE</b>																						
24	Waterproofing		36,000.00	36,000.00	100%												36,000.00	100%				1,800.00	
25	Insulation/Caulking		39,000.00	39,000.00	100%												39,000.00	100%				1,950.00	
26	Break Metal		12,000.00	12,000.00	100%												12,000.00	100%				600.00	
27	<b>DOORS &amp; WINDOWS</b>																						
28	HM Doors		79,000.00	79,000.00	100%												79,000.00	100%				3,950.00	
29	OH Doors		77,000.00	77,000.00	100%												77,000.00	100%				3,850.00	
30	Coiling Doors		4,000.00	4,000.00	100%												4,000.00	100%				200.00	
31	Aluminum Frames/Glazing		65,000.00	65,000.00	100%												65,000.00	100%				3,250.00	
32	<b>FINISHES</b>																						
33	SS Framing		43,000.00	43,000.00	100%												43,000.00	100%				2,150.00	
34	Drywall		62,000.00	62,000.00	100%												62,000.00	100%				3,100.00	
35	ACT		13,000.00	13,000.00	100%												13,000.00	100%				650.00	
	<b>PAGE TOTALS</b>																						
	<b>REGULAR ITEM TOTALS</b>		\$1,619,000.00	\$1,618,000.00	100%	\$1,000.00											\$1,619,000.00	100%				\$80,950.00	
	<b>CHANGE ORDERS</b>		\$3,376,000.00	\$3,357,400.00	99%	\$18,600.00											\$3,376,000.00	100%				\$168,800.00	
	<b>GRAND TOTALS</b>		\$4,995,000.00	\$4,975,400.00	99%	\$19,600.00											\$4,995,000.00	100%				\$249,750.00	

AIA Document G702, APPLICATION AND CERTIFICATE FOR PAYMENT, containing  
 Contractor's signed Certification is attached.  
 In tabulations below, amounts are stated to the nearest dollar.  
 Use Column L on Contracts where variable retainage for lin.

CONTRACT DATE: 1/21/2025  
 FROM: 4/1/2026  
 TO: 4/30/2026

APPLICATION NO: 16  
 INVOICE NO: 003721  
 PROJECT NO: 54259  
 ARCHITECT PROJECT NO:

ITEM NO.	DESCRIPTION OF WORK	BILLING CODES	D SCHEDULED VALUE		E PREVIOUS APPLICATION		G COMPLETED THIS MONTH			I TOTAL COMPLETE AND STORED TO DATE		K BALANCE TO FINISH	
			AMOUNT	PERCENT COMPLETE	AMOUNT	PERCENT COMPLETE	WORK IN PLACE	STORED MATERIALS	PERCENT COMPLETE	AMOUNT	COMPLETE	BALANCE	RETAINAGE
36	Flooring		28,000.00	100%	28,000.00	100%				28,000.00	100%		1,400.00
37	Painting		22,000.00	100%	22,000.00	100%				22,000.00	100%		1,100.00
38	Sealed Concrete		8,500.00	100%	8,500.00	100%				8,500.00	100%		425.00
39	<b>SPECIALTIES</b>												
40	Accessories/Specialties		30,000.00	100%	30,000.00	100%				30,000.00	100%		1,500.00
41	Mapes Canopy		25,000.00	100%	25,000.00	100%				25,000.00	100%		1,250.00
42	<b>FURNISHINGS</b>												
43	Furnishings		9,500.00	100%	9,500.00	100%				9,500.00	100%		475.00
44	<b>SPECIAL CONSTRUCTION</b>												
45	PEMB		253,000.00	100%	253,000.00	100%				253,000.00	100%		12,650.00
46	Metal Wall Panels		111,000.00	100%	111,000.00	100%				111,000.00	100%		5,550.00
47	Erection		178,000.00	100%	178,000.00	100%				178,000.00	100%		8,900.00
48	Insulation		30,000.00	100%	30,000.00	100%				30,000.00	100%		1,500.00
49	<b>MECHANICAL</b>												
50	Plumbing Fixtures		69,000.00	100%	69,000.00	100%				69,000.00	100%		3,450.00
51	Plumbing Material		51,000.00	100%	51,000.00	100%				51,000.00	100%		2,550.00
52	Plumbing Labor		43,000.00	100%	43,000.00	100%				43,000.00	100%		2,150.00
53	Plumbing Insulation		14,000.00	100%	14,000.00	100%				14,000.00	100%		700.00
54	T&B		8,000.00	100%	8,000.00	100%				8,000.00	100%		400.00
55	HVAC Insulation		12,000.00	100%	12,000.00	100%				12,000.00	100%		600.00
56	Controls		54,000.00	100%	54,000.00	100%				54,000.00	100%		2,700.00
57	HVAC Equipment		121,000.00	100%	121,000.00	100%				121,000.00	100%		6,050.00
58	HVAC Materials		57,000.00	100%	57,000.00	100%				57,000.00	100%		2,850.00
59	HVAC Labor		69,000.00	100%	69,000.00	100%				69,000.00	100%		3,450.00
60	Sprinkler		52,000.00	100%	52,000.00	100%				52,000.00	100%		2,600.00
61	<b>ELECTRICAL</b>												
62	Electrical Gear		42,000.00	100%	42,000.00	100%				42,000.00	100%		2,100.00
63	Generator		88,000.00	80%	70,400.00	80%	17,600.00		20%	88,000.00	100%		4,400.00
64	DJE		9,000.00	100%	9,000.00	100%				9,000.00	100%		450.00
65	Lighting		62,000.00	100%	62,000.00	100%				62,000.00	100%		3,100.00
66	Cable Reels		3,000.00	100%	3,000.00	100%				3,000.00	100%		150.00
67	Panel Feeders		64,000.00	100%	64,000.00	100%				64,000.00	100%		3,200.00
68	Temp Power		5,000.00	100%	5,000.00	100%				5,000.00	100%		250.00
69	Electrical Materials		24,000.00	100%	24,000.00	100%				24,000.00	100%		1,200.00
70	Electrical Labor		68,000.00	100%	68,000.00	100%				68,000.00	100%		3,400.00
<b>PAGE TOTALS</b>					\$1,592,400.00	99%	\$17,600.00		1%	\$1,610,000.00	100%		\$80,500.00
<b>REGULAR ITEM TOTALS</b>					\$3,376,400.00	99%	\$18,600.00		1%	\$3,376,000.00	100%		\$168,800.00
<b>CHANGE ORDERS</b>					\$16,308.30	100%	\$18,600.00			\$16,308.30	100%		\$815.41
<b>GRAND TOTALS</b>					\$3,392,708.30	99%	\$18,600.00		1%	\$3,392,308.30	100%		\$169,615.41

AIA Document G702, APPLICATION AND CERTIFICATE FOR PAYMENT, containing  
 Contractor's signed Certification is attached.  
 In tabulations below, amounts are stated to the nearest doll  
 Use Column L on Contracts where variable retainage for lin

APPLICATION NO: 16  
 INVOICE NO: 003721  
 PROJECT NO: 54259  
 ARCHITECT PROJECT NO:

1/21/2025  
 4/1/2026  
 4/30/2026

A	B	C	D	E		F		G		H		I	J	K	L	M
				SCHEDULED VALUE	PREVIOUS APPLICATION	WORK IN PLACE	STORED MATERIALS	PERCENT COMPLETE	PERCENT COMPLETE	AMOUNT	STORED TO DATE					
ITEM NO	DESCRIPTION OF WORK	BILLING CODES	AMOUNT	AMOUNT	PERCENT COMPLETE	PERCENT COMPLETE	AMOUNT	AMOUNT	PERCENT COMPLETE	AMOUNT	PERCENT COMPLETE	AMOUNT	AMOUNT	PERCENT COMPLETE	BALANCE	RETAINAGE
71	Site Electrical and Utility		46,000.00	46,000.00	100%	100%						46,000.00	100%		2,300.00	
72	Fire Alarm		21,000.00	21,000.00	100%	100%						21,000.00	100%		1,050.00	
73	Access Control		24,000.00	24,000.00	100%	100%						24,000.00	100%		1,200.00	
74	Security		8,000.00	8,000.00	100%	100%						8,000.00	100%		400.00	
75	Network		32,000.00	32,000.00	100%	100%						32,000.00	100%		1,600.00	
76	Audio Video		16,000.00	16,000.00	100%	100%						16,000.00	100%		800.00	
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<b>PAGE TOTALS</b>			\$147,000.00	\$147,000.00	100%	100%	\$147,000.00	\$147,000.00	100%	\$147,000.00	100%	\$147,000.00	100%		\$7,350.00	
<b>REGULAR ITEM TOTALS</b>			\$3,376,000.00	\$3,357,400.00	99%	99%	\$3,357,400.00	\$3,376,000.00	100%	\$3,376,000.00	100%	\$3,376,000.00	100%		\$168,800.00	
<b>CHANGE ORDERS</b>			\$16,308.30	\$16,308.30	100%	100%	\$16,308.30	\$16,308.30	100%	\$16,308.30	100%	\$16,308.30	100%		\$815.41	
<b>GRAND TOTALS</b>			\$3,392,308.30	\$3,373,708.30	99%	99%	\$3,373,708.30	\$3,392,308.30	100%	\$3,392,308.30	100%	\$3,392,308.30	100%		\$169,615.41	

AIA Document G702, APPLICATION AND CERTIFICATE FOR PAYMENT, containing Contractor's signed Certification is attached.  
 CONTRACT DATE: 1/21/2025 APPLICATION NO:  
 FROM: 4/1/2026 INVOICE NO:  
 TO: 4/30/2026 ARCHITECT PROJECT NO:

ITEM NO.	DESCRIPTION OF WORK	CHANGE ORDER NUMBER	SCHEDULED VALUE		PREVIOUS APPLICATION		COMPLETED THIS MONTH			TOTAL COMPLETE AND TO DATE		BALANCE TO FINISH	
			AMOUNT	PERCENT COMPLETE	AMOUNT	PERCENT COMPLETE	WORK IN PLACE	STORED MATERIALS	PERCENT COMPLETE	AMOUNT	COMPLETE	STORED TO DATE	PERCENT COMPLETE
1	AIA 1 COR 001- 3rd Avenue Hydrant	0001	6,747.30	100%	6,747.30	100%				6,747.30	100%		337.36
2	AIA 2 COR2, COR3, COR6	AIA 2	(781.82)	100%	(781.82)	100%				(781.82)	100%		(39.09)
3	AIA 3 COR 7,8,9,10,11,12, and 13	AIA 3	4,754.47	100%	4,754.47	100%				4,754.47	100%		237.72
4	AIA 4 COR 14, 15, 16, and 17	AIA 4	5,588.35	100%	5,588.35	100%				5,588.35	100%		279.42
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<b>PAGE TOTALS</b>			\$16,308.30	100%	\$16,308.30	100%							\$815.41
<b>CHANGE ORDER TOTAL</b>			\$16,308.30	100%	\$16,308.30	100%							\$815.41
<b>REGULAR ITEMS TOTALS</b>			\$3,376,000.00	99%	\$3,357,400.00	99%	\$18,600.00		1%	\$3,376,000.00	100%		\$168,800.00
<b>GRAND TOTALS</b>			\$3,392,308.30	99%	\$3,373,708.30	99%	\$18,600.00		1%	\$3,392,308.30	100%		\$169,615.41

MODIFIED AIA G703 - CONTINUATION SHEET FOR G702