

WASATCH PEAKS RANCH PUBLIC INFRASTRUCTURE DISTRICT

36 S. State Street, Suite 500 Salt Lake City, UT 84111

NOTICE OF REGULAR MEETING AND AGENDA

DATE: Monday, April 13, 2026

TIME: 4:00 p.m.

LOCATION: 36 S. State Street, Suite 500
Salt Lake City, UT 84111

ACCESS: To attend via Microsoft Teams Videoconference, use the below link:
https://teams.microsoft.com/l/meetup-join/19%3ameeting_MGY5OGNkMTctZDk0Ny00OTU2LWI1ZDktMTg1ODc0NWNmYjNk%40thread.v2/0?context=%7b%22Tid%22%3a%223e95e77c-c839-42d7-a767-aac8531785ff%22%2c%22Oid%22%3a%228d48df21-9763-40d0-ba52-983e5a92dcea%22%7d

BOARD OF TRUSTEES: Gary Derck
Ed Schultz
Jenny Robinson

PUBLIC NOTICE is hereby given that the Board of Trustees (the “Board”), of the Wasatch Peaks Ranch Public Infrastructure District (the “District”), will hold a meeting of the Board on Monday, April 13, 2026, commencing at 4:00 p.m., at 36 South State Street, Suite 500, Salt Lake City, Utah, 84111 and via Microsoft Teams, at which time the Board shall proceed according to the following agenda.

“As the Chair of the Board of Trustees of the Wasatch Peaks Ranch Public Improvement District, I hereby call this regular meeting of the Board to order at ___ P.M. on April 13, 2026, at 36 S State Street, Suite 500, Salt Lake City, UT 84111. In compliance with the requirements of Utah’s Open and Public Meetings Law: (i) notice of this meeting has been duly posted and published, and (ii) this meeting is being recorded and minutes of the meeting, in its entirety, are being kept.”

I. ADMINISTRATIVE MATTERS

- A. Call to order.
- B. Public Comment. Members of the public may express their views to the Board on matters that affect the District that are otherwise not on the agenda. Comments will be limited to three (3) minutes per person

- C. Review and approval of the December 8, 2025, Meeting Minutes (enclosure).

II. FINANCIAL MATTERS

- A. Approve and/or ratify approval of payment of claims (enclosure).
- B. Q4 2025 Financials (enclosure).

III. LEGAL MATTERS

- A. Review and approve Records Retention Schedule (enclosure).
- B. 2026 Ethics Policy Acknowledgements.

IV. TRUSTEES' MATTERS

- A. Comments, reports, updates, and discussion of ongoing issues and future agenda topics.

V. OTHER BUSINESS

VI. ADJOURNMENT

[This notice to be posted at the District office and published on the Utah Public Notice Website at least 24 hours prior to the meeting.]

December 8, 2025, Meeting Minutes

MINUTES OF A REGULAR MEETING OF
THE BOARD OF TRUSTEES OF THE
WASATCH PEAKS RANCH PUBLIC INFRASTRUCTURE DISTRICT (THE “DISTRICT”)
HELD
DECEMBER 8, 2025

A regular meeting of the Board of Trustees of the Wasatch Peaks Ranch Public Infrastructure District (referred to hereafter as the “Board”) was convened on Monday, December 8, 2025, at 4:00 p.m., at 36 S. State Street, Suite 500, Salt Lake City, UT 84111 and via Microsoft Teams. The meeting was open to the public.

ATTENDANCE

Trustees in attendance were:

Gary Derck

Ed Schultz

Jenny Robinson

Also, In Attendance Were:

Todd Godfrey, Esq.; Hayes Godfrey Bell, P.C. (“HGB”)

Carley Herrick, Matt Musil, Suzanne Bennett, Evan Tufts, and Kelli Reid; Wasatch Peaks Ranch

ADMINISTRATIVE MATTERS

Call to Order:

The meeting was called to order at 4:03 p.m. by Trustee Derck, who recited the following: *“As a Trustee of the Board of Trustees of the Wasatch Peaks Ranch Public Improvement District, I hereby call this regular meeting of the Board to order at 4:03 p.m. on December 8, 2025, at 36 S State Street, Suite 500, Salt Lake City, UT 84111. In compliance with the requirements of Utah’s Open and Public Meetings Law: (i) notice of this meeting has been duly posted and published, and (ii) this meeting is being recorded and minutes of the meeting, in its entirety, are being kept.”*

Public Comment:

None.

Minutes of November 10, 2025 Meeting:

Trustee Derck reviewed the minutes with the Board. Trustee Robinson made a motion to approve the Minutes of the November 10, 2025, Meeting. Trustee Schultz seconded the motion. The motion passed unanimously by Trustee Robinson, Schultz, and Derck.

2026 Meeting Schedule

Trustee Derck reviewed the proposed 2026 Annual Meeting Schedule with the Board. Trustee Schultz made a motion to approve the 2026 Annual Meeting Schedule. Trustee Robinson seconded the motion. The motion passed unanimously by Trustee Robinson,

Schultz, and Derck.

FINANCIAL MATTERS

Payment of Claims

Trustee Derck reviewed the payment of claims with the Board. Trustee Schultz made a motion to approve the payment of claims. Trustee Robinson seconded the motion. The motion passed unanimously by Trustee Robinson, Schultz, and Derck.

Public Hearing on the 2026 Operating and Capital Budget and Adoption of Same

The Board open and closed the Public Hearing on the 2026 Operating and Capital Budget, noting no members of the public were present. Mr. Musil reviewed the operating and capital budget for calendar year 2026 with the Board. Various questions were asked and answered. Trustee Schultz made a motion to approve the 2026 Operating and Capital Budget. Trustee Robinson seconded the motion. The motion passed unanimously by Trustee Robinson, Schultz, and Derck.

LEGAL MATTERS

None.

TRUSTEES' MATTERS

None.

ADJOURNMENT

There being no further business to come before the Board at this time, Trustee Robinson made a motion to adjourn the meeting at 4:12 p.m. Trustee Schultz seconded the motion. The motion passed unanimously by Trustee Robinson, Schultz, and Derck.

Respectfully submitted,

By _____
District Chair

Attest:

District Clerk

Payment of Claims

WPR PID District
For the period 11/1/2025-4/6/2026

Paid Claims

Date	Person/Description	Reference	Amount	Remarks
12/18/2025	UTAH LOCAL GOVERNMENT TRUST (v0000427)	9999121825	(3,500.00)	General Liability Endorsement
1/27/2026	Transfer to Ranch - Interco Reimbursement		(1,193.00)	Transfer to Ranch - Interco Reimbursement
1/30/2026	UMB BANK, N.A. (v0000697)	9999013026	(4,000.00)	1/1/26-12/31/26
3/20/2026	SQUIRE & COMPANY (v0000809)	9999032026	(2,250.00)	Progress Billing - 2025 Audit
			(10,943.00)	

Unpaid Claims

Date	Vendor	Amount
There are no unpaid claims as of 4/6/2026		-

Q4 2025 Financials

Wasatch Peaks Ranch Public Infrastructure District
Balance Sheet
Governmental Funds
December 31, 2025

	<u>General Fund</u>	<u>Debt Service Fund</u>
ASSETS		
Cash	\$ 43,202	\$ 163
Property taxes receivable	779,810	-
TOTAL ASSETS	<u>\$ 823,013</u>	<u>\$ 163</u>
 LIABILITIES		
Accounts Payable	<u>1,193</u>	<u>-</u>
TOTAL LIABILITIES	1,193	-
 DEFERRED INFLOWS OF RESOURCES		
Unavailable revenue - property taxes	<u>-</u>	<u>-</u>
TOTAL DEFERRED INFLOWS OF RESOURCES	-	-
 FUND BALANCE		
Fund balance	<u>821,820</u>	<u>163</u>
TOTAL FUND BALANCE	821,820	163
 TOTAL LIABILITIES, DEFERRED INFLOWS, AND FUND BALANCE	<u>\$ 823,013</u>	<u>\$ 163</u>

Wasatch Peaks Ranch Public Infrastructure District
Statement of Revenues, Expenditures, and Changes in Fund Balance
Governmental Funds
For the Fiscal Period Jan 1, 2025 - Dec 31, 2025

	General Fund			Debt Service Fund		
	PTD Actuals	PTD Budget	Variance	PTD Actuals	PTD Budget	Variance
REVENUE AND OTHER SOURCES						
Property Taxes	\$ 2,021,071	\$ -	\$ 2,021,071	\$ -	630,987	\$ (630,987)
Interest Income	-	-	-	2,102	2,500	(398)
TOTAL REVENUE AND OTHER SOURCES	2,021,071	-	2,021,071	2,102	633,487	(631,385)
EXPENDITURES AND OTHER USES						
Payment of bond interest	-	-	-	1,761,900	578,548	(1,183,352)
Management Expense	4,256	10,000	5,744	-	-	-
Insurance	3,500	4,500	1,000	-	-	-
Professional Fees - Accounting	545	10,000	9,455	-	-	-
Professional Fees - Other	223	-	(223)	4,000	4,000	-
Professional Fees - Assurance	11,000	12,000	1,000	-	-	-
Professional Fees - Legal	3,138	12,000	8,862	-	-	-
Miscellaneous Expense	-	2,500	2,500	-	-	-
Bank Service Fees	0	-	(0)	-	-	-
TOTAL EXPENDITURES AND OTHER USES	22,661	51,000	28,339	1,765,900	582,548	(1,183,352)
TRANSFERS BETWEEN FUNDS						
Transfer from other fund	-	51,000	\$ (51,000)	1,763,908	-	(1,763,908)
Transfer to other fund	(1,763,908)	-	\$ (1,763,908)	-	(51,000)	(51,000)
TOTAL TRANSFERS BETWEEN FUNDS	(1,763,908)	51,000	(1,814,908)	1,763,908	(51,000)	(1,814,908)
NET CHANGE IN FUND BALANCE	234,502	-	177,825	109	(61)	(1,262,941)
BEGINNING FUND BALANCE	587,318	-	587,318	53	61	(8)
ENDING FUND BALANCE	\$ 821,820	\$ -	\$ 765,143	\$ 163	\$ -	\$ (1,262,948)

Wasatch Peaks Ranch Public Infrastructure District
Statement of Long-Term Liabilities
December 31, 2025

	Beginning Balance 12/31/2024	Additions	Retirements	Ending Balance
Governmental Activities:				
<i>Direct Placement</i>				
Bonds payable	\$ 167,712,000	\$ -	\$ -	\$ 167,712,000
Accrued interest	9,663,231	12,414,224	1,761,900	20,315,555
	<u>\$ 177,375,231</u>	<u>\$ 12,414,224</u>	<u>\$ 1,761,900</u>	<u>\$ 188,027,555</u>

Records Retention Schedule

WASATCH PEAKS RANCH PUBLIC INFRASTRUCTURE DISTRICT RECORDS RETENTION SCHEDULE

PREFACE

General Rule. The [Utah Government Records Access and Management Act](#) (GRAMA) mandates that government entities—including public infrastructure districts—establish and submit to the [Records Management Committee](#) a records retention schedule. [Utah Code § 63G-2-604](#).

Definition. A records retention schedule is “simply a practice by which an organization maintains their records for set lengths of time, and systems in which they use to either redirect, store, or dispose of those records.” [Heidi Steed, Create a Basic Retention Schedule in 5 Steps, UTAH DIV. ARCHIVES RECS. SERV. \(Aug. 31, 2022\)](#).

Outline; Minimum Descriptors. Retention schedules vary. However, it is typical for each record to contain the following items:

Description: A description of the retained record’s substance and the context behind such, including any statutory authority mandating retention (this may be included in “Retention”).

Retention: The length of time the record must be retained. This may include the record’s format, in short- or long-term storage. For example, records that must be retained in the State Archives permanently upon transfer may be stored on microfilm, while paper duplicates may be retained by the collecting entity until the administrative need for the record ends.

Appraisal: The (historical, administrative, fiscal, legal, etc.) value of the records and the basis for such.

See, e.g., [General Retention Schedule Items, UTAH DIV. ARCHIVES RECS SERVICE \(visited Nov. 21, 2025\)](#); [Retention Schedule, VINEYARD CITY, UTAH \(Aug. 8, 2018\)](#).

DRAFT RECORDS RETENTION SCHEDULE

The following is a draft records retention schedule for WPR Public Infrastructure District based on the Preface and various records that a public infrastructure district may keep.

Certain items may be missing or erroneously included, as each district is unique and will retain different records. Additionally, categorization is relatively basic given the lower number of records specified.

The record numbers have been listed using a unique “Style” assigned to each Section, and imbedded references use “cross-references.” Thus, the numbering should be automatically updated upon any addition, removal, or reorganization, including headings and internal references. The Table of Contents should be updated by selecting “Update Table” at the top-left corner following any substantial edits.

RECORDS RETENTION SCHEDULE

WPR PUBLIC INFRASTRUCTURE DISTRICT

Adopted April 13 ,2026

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SCHEDULE 1

ADMINISTRATIVE RECORDS

RS101. Constitution and Bylaws

Description: These are the charters, bylaws, and constitution of the District. They establish the organization and operational procedures for the board. They may include the date of adoption and amendments, description and purpose of board, membership, description and responsibilities of board's positions, meeting frequency, voting procedures, explanation of what constitutes a quorum, and the establishment of procedural rules.

Retention: Retain permanently. Records may be transferred to the archives.

Appraisal: Historical value based on their evidence of significant policy formulation and business processes of the government.

RS102. Open Meeting Minutes and Supplementary Materials

Description: Approved minutes of an open meeting are the official record of the meeting of a public body. Per Utah Code 52-4-203 (2024), contained in or with the minutes shall be the substance of all matters proposed, discussed, or decided, and votes taken. This retention schedule includes agendas, notices, any public materials distributed or presented during the meeting, as well as meeting packets or other documents in final form distributed to body members prior to or during the meeting to provide context for matters proposed, discussed, or decided. This may include public and non-public materials.

Retention: Retain permanently. Records may be transferred to the archives.

Appraisal: Historical value based on their importance for documenting legal status, rights, and obligations of individuals.

RS103. Open Meeting Recordings

Description: Audio or video recordings document what transpired in open meetings of public bodies and are the official record of the meeting until and unless written meeting minutes are approved. Recordings used in place of written minutes per Utah Code 52-4-203 (2024) are meeting minutes and are subject to the general retention schedule for open meeting minutes and public materials, per Utah Code 52-4-203(6) (2024).

Retention: Retain for 3 years after approval of written minutes, then destroy.

Appraisal: Value is based on their usefulness in carrying out the agency's current business.

RS104. Closed Meeting Records

Description: Recordings are required for the closed portion of meetings of a public body, except as provided by statute. Per Utah Code 52-4-206(1)(a) (2023), the recording is the official record of a closed meeting.

Retention: Retain permanently. Records may be transferred to the archives.

Appraisal: Historical value based on their evidence of District deliberations, decisions, and actions relating to major social, economic, and environmental issues.

RS105. District Agenda Files

Description: These files document the public notification of regular and special commission meetings. The files include agenda (containing date, time, location of meeting, items to be discussed) and completed forms requesting items to be included on the agenda.

Retention: Retain for 5 years, then destroy.

Appraisal: Value is based on their usefulness in carrying out the agency's current business.

SCHEDULE 2 FINANCIAL RECORDS

RS201. Budget Records

Description: These records are used to document the intended appropriation of funds. Information may include budget requests, proposals, and reports documenting the status of appropriations.

Retention: Retain for 4 years, then destroy.

Appraisal: Fiscal value based on the need to maintain the records for financial audit or financial obligations.

RS202. Audited Financial Statements

Description: The budget is a plan for financial operations for a fiscal year. It documents the actual spending of the District and may be certified by a budget officer and filed with the state auditor.

Retention: Permanent. Retain for 4 years, then transfer to the archives.

Appraisal: Historical value based on their evidence of significant policy formulation and business processes of the District.

RS203. Accounts Payable and Receivable

Description: These are records related to monies collected, paid, or invested in the conduct of business. Information may include bank records, invoices, revenue, expenses, and related accounting records. Trust records are not included.

Retention: Retain for 4 years, then destroy.

Appraisal: Fiscal value based on the need to maintain the records for financial audit or financial obligations.

RS204. Bond Official Transcripts

Description: Official files regarding authority to issue bonds (general obligation or revenue). Records may include Indenture of Trust, leases, authorizing resolutions, offering documents, certificates, specimen bonds, etc.

Retention: Permanent. Retain for 5 years after final action. Transfer records to the archives.

Appraisal: Historical value to researchers interested in business activities in Utah.

RS205. Bonds, Notes, and Interest Payments

Description: These are critical bond documents that are used for the life of bills, notes, debt securities, debt obligations, or bonds. Included are book entries, statements and payment confirmations, application and certificate for eligibility, and related records.

Retention: Retain for 3 years after final action, then destroy.

Appraisal: Fiscal value based on the need to maintain the records for financial audit or financial obligations.

RS206. General Obligation Bonds

Description: These issued bonds are not payable solely from revenues other than those derived from ad valorem taxes. They constitute a full general obligation of the District for the prompt and punctual payment of principal and interest. The revenue derived from the sale of bonds shall be applied only to the purpose specified in the order of the legislative body.

Retention: Retain for 1 year after resolution of issue, then destroy.

Appraisal: Fiscal value based on the need to maintain the records for the duration of the bond.

RS207. Municipal Special Improvement Bonds

Description: The governing body of the municipality levying the assessment, by ordinance or resolution, may authorize the issuance of special improvement bonds to pay costs of improvements in the District against funds created by the assessment.

Retention: Retain until final action, then destroy.

Appraisal: Administrative and/or fiscal value based on their usefulness in carrying out the agency's current business.

SCHEDULE 3

PROJECT, IMPROVEMENT, AND ASSESSMENT FILES

RS301. Planning and Cadastre (Geospatial) Records

Description: These geospatial records contain information pertaining to reference locations (or points on the earth), parcel boundaries, parcel identifiers, parcel addresses, owner types, county recorder contact information, and planning and zoning data.

Retention: Permanent. Retain for 1 year. Records may be transferred to the archives.

Appraisal: Administrative and/or historical value based on the records' evidence of District deliberations, decisions, and actions relating to major social, economic, and environmental issues.

RS302. Assessment Roll Records

Description: These records document real property assessments and payments.

Retention: Retain permanently. Records may be transferred to the archives.

Appraisal: Historical value based on their importance for documenting legal status, rights and obligations of individuals, groups, organizations, and governmental bodies despite the passage of time.

RS303. Special Assessment Plats

Description: These plats show the location of properties that are affected by special assessments. Plats are used for reference and for compilation of the tax roll. They include footage, actual property lines, township and range, rights-of-way, monument markers, lot measurements, blocks, subdivision names, and color coding to indicate properties being assessed.

Retention: Retain for 5 years, then destroy.

Appraisal: Administrative and/or fiscal value based on their evidence of how the affected properties are assessed.

RS304. Special Assessment Books

Description: These books record the levy and assessment of special taxes. They contain extension number, address, plat, or subdivision; block and lot numbers; name of owner; address; number of front feet; amount paid on principle; interest; when paid; total amount paid and principal interest.

Retention: Retain permanently. Records may be transferred to the archives.

Appraisal: Historical value based on their importance for documenting the legal status, rights, and obligations of individuals, groups, organizations, and governmental bodies despite the passage of time.

RS305. Special Assessment Project Administrative Records

Description: Special assessments are charges levied against a specific geographic area for specific benefits from public projects. The records document the process of designating the assessment area, improvements, recommendations, protests, appeals, and related records. Project governance records are not included in this schedule.

Retention: Retain for 5 years after final action, then destroy.

Appraisal: Administrative, and/or fiscal value based on their usefulness for carrying out the agency's current business.

RS306. Special Assessment Project Governance Records

Description: Special assessments are charges levied against a specific geographic area for specific benefits from public projects. These records are used to ensure legal requirements are met to establish the area. These records document the District's resolutions, hearings, ordinances, maps, and related records.

Retention: Retain permanently. Records may be transferred to the archives.

Appraisal: Historical value based on their importance in providing evidence of the significant effects of District programs and actions on individuals, communities, and the natural and manmade environment.

SCHEDULE 4

CONTRACTS, PROCUREMENT, AND VENDOR FILES

RS401. Contract and Lease Records

Description: These records document contractual agreements for property use, products, or services. Records may include requirements and terms, and the signed contract. Contractor payroll records are included.

Retention: Retain for 7 years after expiration of contractual agreement, then destroy.

Appraisal: Administrative, fiscal, and/or legal value based on the statute of limitations for contracts under Utah Code 78B-2-309 (2019).

RS402. Purchasing Records

Description: These records document the purchase of equipment and other materials. Information includes a description of the item being ordered, requesting party, name of vendor, delivery, and payment details.

Retention: Retain for 7 years, then destroy.

Appraisal: Administrative and/or fiscal value based on the records' evidence of the District's administrative purchasing decisions using allocated funds.

RS403. Request for Proposal Records

Description: These records are bids and proposals to provide products or services for the District. Information includes preliminary requirements for procurement of a commodity or service.

Retention: Retain for 6 years after end of project or program, then destroy.

Appraisal: Administrative and/or legal value under Utah Code 63G-6a-2002 (2020).

SCHEDULE 5 LEGAL RECORDS

RS501. Formal Opinion Records

Description: These are the formal legal opinions researched, written, and published by attorneys. They are necessary to maintain consistency of opinion in related matters.

Retention: Retain permanently. Transfer records to the archives.

Appraisal: Administrative and/or historical value based on their evidence of significant policy formulation and business processes of the government.

RS502. Legal Counsel Records

Description: These are legal interpretations given by attorneys at the request of the District asking for guidance in enforcing, obeying, and/or interpretation of the law.

Retention: Retain until resolution of issue, then destroy.

Appraisal: Administrative value based on their usefulness for carrying out the agency's current business.

SCHEDULE 6 PROPERTY RECORDS

RS601. Deed Records

Description: These records are deeds and conveyances of real estate owned by the District, including original deeds, titles, insurance, and tax information.

Retention: Retain permanently. Transfer records to the archives.

Appraisal: Historical value based on their importance for documenting legal status, rights and obligations of individuals, groups, organizations, and governmental bodies despite the passage of time.

RS602. Special Assessment Plats

See **RS303**.

RS603. Easements

Description: These files contain documents executed by property owners granting the District rights to access their property for the District's purposes. They include the names of parties, purposes, and terms of access and terms of easement. They are used to provide legal access to enter or modify private property.

Retention: Retain permanently. Transfer records to the archives.

Appraisal: Historical value for their documentation of property uses and ownership.

RS604. Right-of-Way Records

Description: These records document both the acquisition of property for the purpose of right-of-way projects and the sale of surplus property after project completion. Information may include a description of the property, property appraisal, offer to purchase, statement of compensation, copies of contracts, agent log, payment closing statements, maps, and plat.

Retention: Retain permanently. Transfer records to the archives.

Appraisal: Historical value based on their evidence of the significant effects of District programs and actions on individuals, communities, and the natural and man-made environment.

SCHEDULE 7

PERSONNEL/PAYROLL RECORDS

RS701. Personnel Reports

Description: These records are used to update and inform the District's Board about the status of employment and include the names of the individuals being hired, as well as their position and location of work. The report also gives the names of people who have left as well as their position, school, and reason for leaving.

Retention: Retain for 1 year, then destroy.

Appraisal: Administrative value based on their usefulness for carrying out the agency's current business.

RS702. Performance Plans and Evaluations

Description: This information documents an employee's performance, including awards, performance plans, qualification records, and evaluations.

Retention: Retain for 3 years after separation, then destroy.

Appraisal: Administrative value based on their usefulness for carrying out the agency's current business.

RS703. Payroll Processing Records

Description: These records verify compensation data for each employee, including salary, hourly rate, and type of pay. Deductions are confirmed in processing payroll before employees are paid.

Retention: Retain for 3 years, then destroy.

Appraisal: Fiscal value based on the need to maintain the records for financial audit or financial obligations.

RS704. Payroll Post-Processing Records

Description: This schedule is for payroll reporting. Each payroll period is closed out when disbursement information is verified using payroll reports.

Retention: Retain for 7 years, then destroy.

Appraisal: Fiscal value based on the need to maintain the records for financial audit or financial obligations.

RS705. Employment History Records

Description: Employment history documents the application, hiring, cumulative salary, and employment with the District of all personnel, including all records necessary to calculate benefits.

Information may include employee details, department and position information, earnings, deductions, and other records. Final actions taken because of disciplinary action are included in this schedule.

Retention: Retain until three years after retirement or death, or 65 years after the date of hire, whichever happens sooner, then destroy.

Appraisal: Administrative, fiscal, and/or legal value as they document employment and eligibility for benefits per Utah Code 49-11-602 (2025).

SCHEDULE 8 REPORTS

RS801. Annual or Official Reports

Description: These are official reports summarizing activities and accomplishments of the District which are produced and distributed. They may include statistics, narrative reports, graphics, and diagrams.

Retention: Retain permanently. Records may be transferred to the archives.

Appraisal: Historical value as evidence of the significant effects of governmental programs and actions on individuals, communities, and the natural and man-made environment.