

Retention and Classification Report

Agency: Governor. Office of Economic Opportunity (325)

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Records Officer: _____

28873	Accounts payable records
14246	Accounts receivable records
00538	*Advertising budget files
28801	Audit reports
28800	Audit work papers
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AGENCY: Governor. Office of Economic Opportunity

SERIES: 28873

1

TITLE: Accounts payable records

DATES: 1988-

ARRANGEMENT: Chronological.

DESCRIPTION:

These records support the agency's function to administer and coordinate state and federal economic development programs within Utah (Utah Code 63N-1-201(3)(a) (2015)). Records document payments made internally and to outside entities, international money transfers, and transfers to other governmental agencies.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is proposed and has not yet been approved.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

Computer data files: Retain in Office for 4 years and then delete.

APPRAISAL:

These records have administrative, and/or fiscal value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Governor. Office of Economic Opportunity

SERIES: 14246

3

TITLE: Accounts receivable records

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 3.00 cubic feet.

DESCRIPTION:

These records support the agency's function to administer and coordinate state and federal economic development programs within Utah (Utah Code 63N-1-201(3)(a) (2015)). Records document billing of non-state agencies or institutions for supplies, services, or repairs provided to the agency and include invoices and related accounting records.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Local government accounts payable and receivable records, GRS-106.

AUTHORIZED: 08-27-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

Computer data files: Retain in Office for 4 years and then delete.

APPRAISAL:

These records have administrative, and/or fiscal value(s).

AGENCY: Governor. Office of Economic Opportunity

SERIES: 14246

TITLE: Accounts receivable records

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Governor. Office of Economic Opportunity

SERIES: 538

3

TITLE: Advertising budget files

DATES: 1982-1986.

ARRANGEMENT: Chronological.

DESCRIPTION:

Files which document transactions of \$10,000 or less and construction contracts under \$2,000. They include contract, requisition, purchase order and lease records, correspondence, related records pertaining to award, administration, receipt, inspection, and payments.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Contract and lease records, GRS-1731.

AUTHORIZED: 07-30-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 6 years and then destroy.

APPRAISAL:

These records have fiscal value(s).

This disposition is based on general audit requirements.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 07/2017.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 28801

3

TITLE: Audit reports

DATES: 1980-

ARRANGEMENT: Chronological

DESCRIPTION:

These records support the agency's function to evaluate the effectiveness of programs and operations administered in order to facilitate economic development in the state (Utah Code 63N-1-201(3) (2015)). Reports document initial findings of the audit and final recommendations for improvement.

RETENTION:

Permanent. Retain for 8 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Audit records, GRS-1727.

AUTHORIZED: 10-23-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office for 8 years and then delete.

APPRAISAL:

These records have administrative, fiscal, and/or historical value(s).

These records track the development and execution of agency programs over time and are valuable for researchers.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 28801

TITLE: Audit reports

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2016.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 28800

3

TITLE: Audit work papers

DATES: 1980-

ARRANGEMENT: Numerical by project number

DESCRIPTION:

These records support the agency's function to evaluate the effectiveness of programs and operations administered by the agency in order to facilitate economic development in the state (Utah Code 63N-1-201(3) (2015)). Records are collected during the course of performing audits and substantiate the findings of the audit. Information may include financial records, feedback from agency staff members, and related correspondence.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 02/2016

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 8 years and then destroy.

Computer data files: Retain in Office for 10 years and then delete.

APPRAISAL:

These records have administrative value(s).

RETENTION JUSTIFICATION:

10-year retention period is requested by agency's auditor. Office of the State Auditor has a similar series (9412) with the same retention.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 28800

TITLE: Audit work papers

(continued)

PRIMARY DESIGNATION:

Protected Utah Code 63G-2-305(10 and 16)(2015)

SECONDARY DESIGNATION(S):

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2016.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 59909

3

TITLE: Board of Industrial Promotion minutes

DATES: 1983-1992.

ARRANGEMENT: Chronological

DESCRIPTION:

These files contain documentation relating to meetings held by the Board of Industrial Promotion and indicate plans for Utah's growth as an industrial center. The files include are minutes, agenda, correspondence, and attachments.

RETENTION:

Permanent. Retain for 5 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 10/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s). Meetings files have a permanent retention.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 14227

1

TITLE: Contract correspondence

DATES: 1993-

ARRANGEMENT: Alphabetical by computer file name

DESCRIPTION:

This series contains form letters used in correspondence with contractors. These letters are maintained in electronic form.

RETENTION:

Retain

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is proposed and has not yet been approved.

FORMAT MANAGEMENT:

Computer data files: Retain in Office for 3 years and then delete provided paper copy is filed in contractor's contract file.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Governor. Office of Economic Opportunity

SERIES: 14219

3

TITLE: Contract files

DATES: ca. 1984-

ARRANGEMENT: Alphabetical by subject or agency name, thereunder by private contracting party name

ANNUAL ACCUMULATION: 3.00 cubic feet.

DESCRIPTION:

These records support the agency's function to facilitate economic development in the state by actively creating, developing, attracting, and retaining business, industry, and commerce (Utah Code 63N-1-201(3)(c) (2015)). Records document agreements made between the agency and organizations that participate in technological innovation and business incentive programs, or in other projects related to economic development in Utah. Information includes participant applications and profiles, terms of the agreement, executed contracts, correspondence, and related materials.

RETENTION:

Retain for 7 year(s) after expiration of contractual agreement

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Contract and lease records, GRS-1731.

AUTHORIZED: 07-30-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after termination of contract and then transfer to State Records Center. Retain in State Records Center for 6 years and then destroy.

Computer data files: Retain in Office for 7 years after termination of contract and then delete.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 14219

TITLE: Contract files

(continued)

APPRAISAL:

These records have administrative, and/or legal value(s).

This disposition is based on Utah Code 78B-2-309(2) (2008), which says that actions cannot be brought six years after the expiration of the contract.

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Protected. Utah Code 63G-2-305(2)(c)(2015)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2015.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 528

3

TITLE: Executive correspondence

DATES: 1980-

ARRANGEMENT: Chronological.

DESCRIPTION:

These records support the agency's function to facilitate economic development in the state by actively creating, developing, attracting, and retaining business, industry, and commerce (Utah Code 63N-1-201(3)(c) (2015)). Records document the executive decision-making and directives of the director and other executives within the agency, and include correspondence and related materials.

RETENTION:

Permanent. Retain for 5 year(s) after separation

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State agency executive correspondence, GRS-1758.

AUTHORIZED: 07-12-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years after separation and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office until separation and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have historical value(s).

Disposition is based on the value of these records in documenting agency achievements, policies, programs, and function.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 528

TITLE: Executive correspondence

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 10/2019.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 30445

3

TITLE: Gifts

DATES: 2019

ARRANGEMENT: None.

DESCRIPTION:

This series contains gifts received by the agency in its interactions other governmental entities. The gifts document the relationships developed by the agency in the course of conducting business. The Archives currently holds a bronze statue dedicated to Chinese workers who helped construct the Central Pacific Railroad from California to Promontory Summit. It was created by sculptor Yuan Xikun (b. 1944) and gifted to the Governor's Office of Economic Development by a Chinese delegation in May 2012. The sculpture stands about 26 inches tall.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Artifacts, GRS-2049.

AUTHORIZED: 12-01-2016

FORMAT MANAGEMENT:

Artifacts: Retain in Office until administrative need ends and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have historical value(s).

The sculpture in this series has permanent historical value as physical evidence of the economic relationship between the State of Utah and China. It also has intrinsic value as a work of art.

PRIMARY DESIGNATION:

Public

AGENCY: Governor. Office of Economic Opportunity

SERIES: 59908

3

TITLE: Industrial development correspondence

DATES: 1981-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

This correspondence to and from the office of Industrial Development documents the plans and programs of the Department of Community and Economic Development to promote Utah's industrial growth.

RETENTION:

Permanent. Retain for 5 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 10/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s).
These records are business-related correspondence that provides unique information about agency functions, policies, procedures, or programs. The records document material discussions and decisions and may originate on paper, electronic mail, or other media.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 59908

TITLE: Industrial development correspondence

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Governor. Office of Economic Opportunity

SERIES: 3250

3

TITLE: Labor market area reports

DATES: i 1982-

ARRANGEMENT: Alphabetical by market area

DESCRIPTION:

Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

RETENTION:

Retain permanently

DISPOSITION:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10-30-2018

FORMAT MANAGEMENT:

Paper: For records beginning in 1982 and continuing to the present. Retain in State Archives permanently with authority to weed.

PRIMARY DESIGNATION:

Public

AGENCY: Governor. Office of Economic Opportunity

SERIES: 84450

3

TITLE: Personnel files of terminated employees

DATES: 1980-1993.

ARRANGEMENT: Alphabetical by employee name

DESCRIPTION:

This series contains personnel files used to verify the work history of employees. The files document the terms of the employment contract and track the performance of an employee. They include employment applications, resumes, test results, human resource profiles, position descriptions, performance reviews, performance plans, position request and authorization forms, performance appraisal reports, notices of personnel action, copies of social security cards, benefits forms, conflict of interest forms, and related correspondence. These files are not differentiated by type of employment, i.e. permanent, temporary, transfer, etc.

RETENTION:

Retain for 65 year(s) after separation

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 03/1988

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years after separation of employee and then transfer to State Records Center. Retain in State Records Center for 63 years and then destroy.

APPRAISAL:

These records have administrative, fiscal, and/or legal value(s). Beginning in Fiscal Year 1990 personnel files of the Economic Development Division will be centralized and maintained as part of the personnel files of the Department of Community and Economic Development.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 84450

TITLE: Personnel files of terminated employees

(continued)

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(e), 302(2)(a) (2008)

SECONDARY DESIGNATION(S):

Public. Dates of employment, educational and employment history relevant to job, gender, gross compensation from state-appropriated funds, job description, job qualifications, name, number of hours worked.

AGENCY: Governor. Office of Economic Opportunity

SERIES: 15190

3

TITLE: Publications

DATES: 1968-1995.

ARRANGEMENT: Chronological.

DESCRIPTION:

Documents created by the Division of Economic and Industrial Development, including pamphlets, reports, leaflets, file manuals, annual reports, other published or processed documents, and the last manuscript report, if not published, relating to management projects. Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10-30-2018

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have historical value(s).

Disposition based on the value of these records in documenting agency/program achievements, policies, procedures, and function.

PRIMARY DESIGNATION:

Public

AGENCY: Governor. Office of Economic Opportunity

SERIES: 28872

3

TITLE: Travel reimbursement records

DATES: 1988-

ARRANGEMENT: Alphabetical by surname.

DESCRIPTION:

These records support the agency's function to facilitate economic development in the state by actively creating, developing, attracting, and retaining business, industry, and commerce (Utah Code 63N-1-201(3)(c) (2015)). Records document the expenditure and reimbursement of eligible travel expenses and may include gas receipts, hotel reservations, transportation requests, itemized expenses, correspondence, and related records.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Reimbursement files, GRS-1833.

AUTHORIZED: 01-11-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

Computer data files: Retain in Office for 3 years and then delete.

APPRAISAL:

These records have administrative, and/or fiscal value(s).

AGENCY: Governor. Office of Economic Opportunity

SERIES: 28872

TITLE: Travel reimbursement records

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Governor. Office of Economic Opportunity

SERIES: 3261

3

TITLE: Utah update scrapbooks

DATES: 1983-

ARRANGEMENT: Alphanumerical.

DESCRIPTION:

Scrapbooks, photographs, articles, program notes and documentation of events sponsored or funded by an agency. Also included are narrative audio or audiovisual agency histories.

RETENTION:

Retain permanently

DISPOSITION:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 11-28-2018

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

PRIMARY DESIGNATION:

Public