

## Retention and Classification Report

**Agency:** Division of Business and Economic Development. Bureau of Procurement Outreach (1829)  
324 South State Street STE 500  
Salt Lake City, UT 84111

**Records Officer:** \_\_\_\_\_

14292	*Budget papers
14293	Client case files
14245	Correspondence
14264	Defense Logistics Agency contract files
14291	*Fixed asset inventory
19962	Meeting minutes and newsletters
14262	Monthly activity reports
14290	Parking validation disbursement record
14294	Publications
14289	Regional affiliate monthly reports
14265	Regional affiliate office files
19961	Scrapbooks
14263	Travel reimbursement files
14261	Weekly activity reports
19960	Workshop records

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14292

3

**TITLE:** Budget papers

**DATES:** 1985-1995.

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

Records used to assist in the preparation of the division budget and to justify budget requests presented to the department director. They also contain work programs, etc.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Budget records, GRS-1856.

**AUTHORIZED:** 12-17-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 4 years and then destroy.

**APPRAISAL:**

These records have legal value(s).

This disposition is based on 32 CFR 278.42(3)(c) (1991), which says that records relating to federal grant funds be maintained for four years. The 1993 Utah General Retention Schedule, schedule 2 item 6, specifies three years for these records.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14293

3

**TITLE:** Client case files

**DATES:** 1985-

**ARRANGEMENT:** Alphabetical by client/firm name, thereunder chronological

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

These records document businesses seeking assistance from the Procurement Outreach Program and are used to track the work that the consultants do with a specific client. Consultants counsel businesses on how the government purchases items, how to market a product, and they also conduct data base searches to let the company know who is buying widgets on that particular day. Information includes the correspondence, hand-written consultant notes, and data regarding client firm name, a contact person's name and phone number, address and size of firm, geographic distribution, and bonding capability.

**RETENTION:**

Retain for 3 year(s) after end of project or program

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 07/1998

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years after close of grant period or until client is inactive and then destroy.

**APPRAISAL:**

These records have legal value(s).

This disposition is based on 7 CFR 3016.42 (1992), which says that these records must be kept at least three years.

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14293

**TITLE:** Client case files

(continued)

**PRIMARY DESIGNATION:**

Protected

Provided the firm has made a business confidentiality claim, UCA 63G-2-305(1)-(2), 308 (2008).

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14245

3

**TITLE:** Correspondence

**DATES:** 1985-

**ARRANGEMENT:** Chronological by month

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

Business-related correspondence which provide unique information about agency functions, policies, procedures, or programs. These records document material discussions and decisions made regarding all agency interests, and may originate on paper, electronic mail, or other media. This correspondence is filed separately from program case files, and project files.

**RETENTION:**

Permanent. Retain for 5 year(s)

**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 1 year and then transfer to State Records Center. Retain in State Records Center for 4 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

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

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14245

**TITLE:** Correspondence

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14264

3

**TITLE:** Defense Logistics Agency contract files

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

This series is composed of grant requests to the Defense Logistics Agency (DLA), contracts between the Procurement Outreach Office and the DLA, quarterly reports to the DLA, and any related documents. They document the reciprocal obligations of the office and the DLA. Information includes reasons for the grant request, agreement terms, dollar-value of client firm contracts, budget information, and lists of individual contract amounts and numbers.

**RETENTION:**

Retain for 6 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 07/1998

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 4 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**APPRAISAL:**

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

This disposition is based on the administrative needs expressed by the agency. According to 7 CFR 3016.42 (1992), the records must be kept at least three years.

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14264

**TITLE:** Defense Logistics Agency contract files

(continued)

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Protected.

Business confidentiality claims, provided such are made. UCA 63G-2-305(1)-(2), and 308 (2008).



**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14291

1

**TITLE:** Fixed asset inventory

**DATES:** 1985-1995.

**ARRANGEMENT:** Various

**DESCRIPTION:**

These records are used to track and control capital outlay such as office equipment (chairs, typewriters, etc.) and other fixed assets including tools, machinery, and other large equipment.

**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 2 years and then delete.

Paper: Retain in Office for 1 year and then destroy.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 19962

3

**TITLE:** Meeting minutes and newsletters

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These records document staff meeting minutes, newsletters, and similar data that illustrate the history of the Procurement Outreach office.

**RETENTION:**

Permanent. Retain for 5 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Open meeting minutes & supplementary materials, GRS-1709.

**AUTHORIZED:** 10-28-2020

**FORMAT MANAGEMENT:**

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

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14262

3

**TITLE:** Monthly activity reports

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These monthly reports of the Procurement Outreach Office facilitate legislative and administrative oversight and provide historical documentation of agency activities. The information is derived from the Weekly activity reports, series 14261, and is edited to allow public access. Copies of this report go to the State Legislature and to the Division of Business and Economic Development Administration.

**RETENTION:**

Permanent. Retain for 2 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:** 07/1998

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have historical value(s).

This disposition is based on the evidential value of this information to researchers interested in agency activities.

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14262

**TITLE:** Monthly activity reports

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14290

3

**TITLE:** Parking validation disbursement record

**DATES:** 1991-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These forms document the disbursal of parking validations to Procurement Outreach visitors. Information includes the date of visit, visitor name, name and type of firm represented, and number of validations issued.

**RETENTION:**

Retain for 2 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Non-secure area access logs, GRS-2019.

**AUTHORIZED:** 04-03-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 2 years and then destroy.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14294

3

**TITLE:** Publications

**DATES:** 1991-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**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:**

Permanent. Retain until completion of publication or report

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Publications, GRS-1678.

**AUTHORIZED:** 10-30-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office until publication and then transfer to State Archives with authority to weed.

Paper copy: Retain in Office until administrative need ends and then destroy.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14289

3

**TITLE:** Regional affiliate monthly reports

**DATES:** 1985-

**ARRANGEMENT:** Chronological, thereunder numerical by region number

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

These reports are summaries of local affiliate office activity. They facilitate effective oversight of the procurement outreach program and contain information collected from the local offices, which is entered into a database. Included are the names of firms receiving contracts, contract value, total number of contracts awarded, and related information.

**RETENTION:**

Retain for 6 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 07/1998

**FORMAT MANAGEMENT:**

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

Computer data files: Retain in Office until administrative need ends and then delete provided paper copy has been filed.

**APPRAISAL:**

These records have administrative value(s).

This disposition is based on the administrative needs expressed by the agency.

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14289

**TITLE:** Regional affiliate monthly reports

(continued)

**PRIMARY DESIGNATION:**

Protected

Provided all firms have made a business confidentiality claim, UCA 63G-2-305(1)-(2), 308 (2008).



**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14265

3

**TITLE:** Regional affiliate office files

**DATES:** 1985-

**ARRANGEMENT:** Alphabetical by region name, thereunder chronological

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

These contracts (between the Procurement Office and the local affiliates), activity reports, correspondence, and related documentation are maintained to provide administrative oversight of the affiliated procurement offices, operated by nine councils of government. The information includes summaries of activities by the local office, policy statements from the main office, and other related information.

**RETENTION:**

Permanent. Retain for 3 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:** 07/1998

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have historical value(s).

This disposition is based on the evidential value of these records to researchers.

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14265

**TITLE:** Regional affiliate office files

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 19961

3

**TITLE:** Scrapbooks

**DATES:** 1985-

**ARRANGEMENT:** Chronological, thereunder alphabetical by subject

**ANNUAL ACCUMULATION:** 0.20 cubic feet.

**DESCRIPTION:**

These scrapbooks and news clippings document the history of the Procurement Office, which exists to assist small companies in selling their products to the federal government, particularly the Dept. of Defense.

**RETENTION:**

Permanent. Retain for 5 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Agency history records, GRS-1723.

**AUTHORIZED:** 11-28-2018

**FORMAT MANAGEMENT:**

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

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14263

3

**TITLE:** Travel reimbursement files

**DATES:** 1985-

**ARRANGEMENT:** Alphabetical by employee surname

**ANNUAL ACCUMULATION:** 0.20 cubic feet.

**DESCRIPTION:**

These records document payments made to state employees and agencies for the purpose of reimbursing travel, transportation, equipment, service, training, and other reimbursable costs. Records include correspondence, forms, travel reservations, travel authorizations, per diem vouchers, transportation requests, hotel reservations, invoices, itemized expenses, and other supporting records used to validate reimbursable expenses.

**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 copy: Retain in Office for 3 years and then destroy.

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14263

**TITLE:** Travel reimbursement files

(continued)

Private.

Home address and phone number, social security number, and employee credit card numbers. UCA 63G-2-302(1)(e) and 302(2)(d) (2008).

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 14261

3

**TITLE:** Weekly activity reports

**DATES:** 1985-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These weekly reports of the employees provide source information for the Monthly activity reports, series 14262, and provide a means of reporting employee activity to supervisors. The information includes an activity summary of employees, including identification of newly registered clients, problems with existing contracts, employee projects, and number of consultations during the week.

**RETENTION:**

Retain for 4 year(s) after completion of publication or report

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 07/1998

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 4 years after creation of related monthly report and then destroy.

**APPRAISAL:**

These records have administrative, and/or legal value(s).  
This disposition is based on 7 CFR 3016.42 (1992), which states to retain the records three years. The division needs these records for an additional year for administrative purposes.

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 19960

3

**TITLE:** Workshop records

**DATES:** 1991-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.40 cubic feet.

**DESCRIPTION:**

These records document the annual Utah Supplier Development Conference, sponsored by the Procurement Outreach office. This large event, in which 300-400 small companies in Utah participate, assists businesses in working with the federal government. All related government agencies and large commercial entities are invited to come and help the small business get acquainted with each other, their buyers, and to sell their products. Products needed by the federal government change frequently, so the conference serves as a way to keep small business informed of current demand. Information includes informal minutes from meetings following the conference, handouts, a directory, mailers, correspondence sent, budget records, publicity items, speaker information, brochures, news articles, and other data gathered to organize the conference. These data are summarized in the Monthly activity reports, series 14262, and retained permanently there.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 07/1998

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then destroy.

**AGENCY:** Governor's Office of Economic Opportunity. Procurement Assistance

**SERIES:** 19960

**TITLE:** Workshop records

(continued)

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public