

Retention and Classification Report

Agency: South Davis Water Improvement District (Utah) (2168)

P.O. Box 140110
Salt Lake City, UT 84114-0110
801-295-4468

Records Officer: _____

28673	Annual budget and audit reports
30741	*Bond official transcripts
28413	Employee personnel files
27642	*Improvement District Plans

AGENCY: South Davis Water Improvement District (Utah)

SERIES: 28673

3

TITLE: Annual budget and audit reports

DATES: 1954-

ARRANGEMENT: Chronologically by year

DESCRIPTION:

These records support the agency's fiscal function to annually prepare a budget and perform an audit (Utah Code 51-2a-202(2004)). Records document the approved annual budget and any subsequent amendments (Utah Code 17-36-15(2012)). Records also document the auditor's findings, written opinion, and recommendations for improvement. Information includes related financial data and supporting documentation.

RETENTION:

Permanent. Retain for 15 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Audited financial statements, GRS-1857.

AUTHORIZED: 12-03-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 15 years and then transfer to State Archives.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 04/2015.

AGENCY: South Davis Water Improvement District (Utah)

SERIES: 30741

3

TITLE: Bond official transcripts

DATES: 1983-1999.

ARRANGEMENT: Chronological

DESCRIPTION:

Official files that provide information about the authority to issue bonds. Records may include Indenture of Trust, leases, authorizing resolutions, offering documents, certificates, specimen bonds, etc

RETENTION:

Retain permanently

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Bond official transcripts, GRS-1799.

AUTHORIZED: 12-01-2013

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public Utah Code 63G-2-301(3)(e) (2020)

AGENCY: South Davis Water Improvement District (Utah)

SERIES: 28413

3

TITLE: Employee personnel files

DATES: 1954-

ARRANGEMENT: Chronological thereunder alphabetical by last name

DESCRIPTION:

These records support the agency's administrative function to manage its human resources. These records document the hiring and employment of individuals. Information includes the original application, records necessary to calculate benefits, related professional training, and any final disciplinary actions or grievances.

RETENTION:

Retain for 65 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Employment history records, GRS-1965.

AUTHORIZED: 08-29-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 25 years after date of employment and then transfer to State Records Center. Retain in State Records Center for 40 years and then destroy.

APPRAISAL:

These records have administrative, and/or legal value(s).
Legal appraisal is based on retention requirement stated in Utah Code 49-11-602(2014).

AGENCY: South Davis Water Improvement District (Utah)

SERIES: 28413

TITLE: Employee personnel files

(continued)

PRIMARY DESIGNATION:

Private Utah Code 63G-2-302(2)(a)(2014)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 03/2015.

AGENCY: South Davis Water Improvement District (Utah)

SERIES: 27642

3

TITLE: Improvement District Plans

DATES: 1971.

ARRANGEMENT:

DESCRIPTION:

This includes unrelated records from the Davis County Planning agency's Improvement District Plans. Examples include a Sewer Improvement District request for federal funding to build a sewer plant, copies of requests for National Endowment for the Arts funding, request from the U.S. Department of Labor for unemployment insurance reports or hours worked by claimants.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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 value of these records in documenting the history, function and decisions of the South Davis Water Improvement District in 1971.

PRIMARY DESIGNATION:

Public