Retention and Classification Report

Agency: Legislature. Office of the Legislative Fiscal Analyst (572)

P.O. Box 145310
W310 State Capitol Complex
Salt Lake City, UT 84114-5310
801-538-1034

Records Officer: _____

03205	Administrative records
25392	Analyst working papers
03210	Appropriations reports
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AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3205 3

TITLE: Administrative records

DATES: 1968-

ARRANGEMENT: Alphanumerical

DESCRIPTION:

Appropriations reports include: 1967-69, 1969-70, 1970-71, 1971-72, 1972-73; 1973-74, 1974-1975; 1975-1976; 1976-1977; 1977-78, 1978-1979; 1980-1981; 1980-1981; 1981-1982; 1982-83, 1989-90).
Other reports include: Interim Progress Report (1 July 1968); Government of Higher Education in Utah (January 1969); Annual Salary Survey (August 1970); Executive Compensation Commission (December 1969); Recommended Compensation Practices for Elected and Appointed Officials (August 1970); Recommendations of the Legislative Analyst for Administrative Improvement (January 1967 and January 1969); An Analysis of Utah Departmental Reorganization and Consolidation (October 1968); Legislative Control Through Fiscal Oversight (4 May 1966); Findings and Recommendations of the Legislative Auditor, 1959-1960 (December 1960); First Biennial Report to the Joint Budget-Audit Committee and the 38th Utah State Legislature (January 1968); A Program for Legislative Fiscal Review (circa 1966); Legislative Computer Application (August 1968); and State Revenue Projections for the Biennial Fiscal Period July 1, 1969, to June 30, 1971 (January 1969). There's a binder from 1978-1979 dealing with the topic of tax relief (1979 HB 303 and reports leading up to it. Fiche includes various other compensation reports,USU analyst, etc.

RETENTION:

Permanent. Retain until administrative need ends

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

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

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3205
TITLE: Administrative records

(continued)

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

APPRAISAL:

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

These records are created by the agency administration to document the history of: research, programs, policies, procedures, leadership, and decision making processes of the agency.

PRIMARY DESIGNATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 25392 3
TITLE: Analyst working papers
DATES: 1995-
ARRANGEMENT: Alphabetical by Sub-committee name.
DESCRIPTION:

These records contain unique information in rough notes or drafts assembled or created and used to prepare or analyze other documents. The information adds proper understanding to the formulation and execution of policies, decisions, actions, or responsibilities.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series are authorized by the Legislature.

APPROVED: 06/2015

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.

APPRAISAL:

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

PRIMARY DESIGNATION:

Protected UCA 63G-2-305 Secs. 21 and 30

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3210 3

TITLE: Appropriations reports

DATES: 1967-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION: 0.20 cubic feet.

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 administrative need ends

DISPOSITION:

Transfer to Archives.

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: For records beginning in 1969 through 1970. Retain in State Archives permanently with authority to weed.

Microfiche duplicate: For records beginning in 1969 through 1970. Retain in State Archives permanently with authority to weed.

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

APPRAISAL:

These records have historical value(s).

Disposition based on the value of these reports in documenting agency procedures and function.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3210
TITLE: Appropriations reports

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3700 3

TITLE: Appropriations requests

DATES: 1963-

ARRANGEMENT:

DESCRIPTION:

Copies of budget estimates and justification prepared or consolidated in formally organized budget offices. Included are appropriation language sheets, narrative statements, workload/expansion plans and related schedules and data.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-17-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

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

This disposition is based on the State Archivist's review and general schedule determination 4/5/1999.

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (1)(b) (2008)

SECONDARY DESIGNATION(S):

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

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3164 3

TITLE: Budget analysis records

DATES: 1971-

ARRANGEMENT: Alphanumerical.

DESCRIPTION:

Correspondence or subject files of formally organized budget offices documenting agency policy and procedures governing budget administration, and reflecting policy decisions affecting expenditures for agency programs.

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 7 years and then transfer to State Records Center. Retain in State Records Center for 8 years and then transfer to State Archives 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).

This disposition is based on the historical and research value of these records to document the actions and function of the Legislature.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3164
TITLE: Budget analysis records

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22958 3
TITLE: Committee audio recordings
DATES: 1992-
ARRANGEMENT: Chronological
DESCRIPTION:

This series consists of audio tape recordings of the Appropriation Committee and Executive Committee. Access to these recordings is often requested for research purposes. The written meeting minutes are retained as part of Series 22952. Records created by an official committee or board, including advisory committees, relating to executive establishment, organization, membership, and policy. Includes agenda, meeting minutes, final reports, and related records documenting the accomplishments of official boards and committees. May include audio and video recording.

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:

Audio cassettes: Retain in Office for 5 years and then transfer to State Archives.

APPRAISAL:

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

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22958
TITLE: Committee audio recordings

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22954 3
TITLE: Fiscal notes
DATES: 1974-
ARRANGEMENT: Chronological
DESCRIPTION:

These records support the agency's function to provide objective, accurate, and relevant budget advice and documentation to the state legislature. These records contain fiscal notes prepared by the agency for proposed legislation. Information includes an analysis of the fiscal impact that each item of proposed legislation would have on state and local governments and on Utah residents and businesses.

RETENTION:

Permanent. Retain

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series are authorized by the Legislature.

APPROVED: 01/2006

FORMAT MANAGEMENT:

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

Computer data files: For records beginning in 2015 and continuing to the present. Retain in Office for 5 years and then transfer to State Archives with authority to weed.

Digital image: Retain in Office permanently.

APPRAISAL:

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

These records document financial factors that affect law creation and are therefore historically valuable.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22954
TITLE: Fiscal notes

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22957 3
TITLE: Interim studies
DATES: 1973-
ARRANGEMENT: Chronological
DESCRIPTION:

Provides documentation of reports to the Executive Committee during interim sessions. The studies are conducted on any appropriation issue which may be an issue during the upcoming legislative session.

RETENTION:

Permanent. Retain for 15 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: 02/2003

FORMAT MANAGEMENT:

Paper: Retain in Office for 10 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives.

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

Value is based on the analysis provided on appropriation issues as reported in these interim studies by the Legislative Fiscal Analyst.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22957
TITLE: Interim studies

(continued)

PRIMARY DESIGNATION:
Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22952 3
TITLE: Meeting minutes
DATES: 1965-
ARRANGEMENT: Chronological
DESCRIPTION:

Provides documentation of the appropriation committee meetings and executive committee meetings. Information includes minutes, agendas and related records.

RETENTION:

Permanent. Retain for 15 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/2000

FORMAT MANAGEMENT:

Paper: Retain in Office for 10 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.

APPRAISAL:

These records have historical value(s).

These records have evidentiary value and serve as a history of board and committee actions. They contain minutes of open committee and board meetings as required by UCA 52-4-7. (2005) Records may also include agenda, recordings, recordings and minutes of closed portions of meetings, and other supporting documentation.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22952
TITLE: Meeting minutes

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22953 3
TITLE: Personnel records
DATES: 1997-
ARRANGEMENT: Alphabetical
DESCRIPTION:

Complete work history of an individual employed by the Legislative Fiscal Analyst Office. May include application for employment or resume, verification of employment eligibility, performance plans, performance evaluations, position description, employee awards, letters of commendation, termination forms, etc. Retirement and pension records are retained permanently by the Office.

RETENTION:

Retain for 65 year(s) after separation

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 until separation or retirement and then transfer to State Records Center. Retain in State Records Center for 65 years and then destroy.

APPRAISAL:

These records have administrative value(s).

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22953
TITLE: Personnel records

(continued)

PRIMARY DESIGNATION:

Private

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 23977 3
TITLE: Public Education Data Book
DATES: 1993-
ARRANGEMENT: Chronological.
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 administrative need ends

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 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 achievements, policies, programs, and function.

PRIMARY DESIGNATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 23292 3
TITLE: Publications
DATES: 1967-
ARRANGEMENT: Chronological.
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 administrative need ends

DISPOSITION:

Transfer to Archives.

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).

This disposition is based on the historical and research value of these publications to document the function of the Office of the Legislative Fiscal Analyst.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 23292
TITLE: Publications

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3187 3

TITLE: State agency budget hearing records

DATES: 1957-

ARRANGEMENT: Alphabetical by subcommittee.

DESCRIPTION:

Records of hearings conducted as part of the regulatory process and hearings on proposed rules and changes; they may be maintained with related information including meeting notices, proofs of publications, meeting minutes, and the conclusions reached. UCA 52-4-200 (2009) requires that written minutes be kept of all open meetings. May include audio and video recordings.

RETENTION:

Permanent. Retain until administrative need ends

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Administrative hearing records, GRS-1655.

AUTHORIZED: 11-06-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have historical value(s).

This disposition is based on the historical and research value of these records to document the actions and function of the Legislature.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3187
TITLE: State agency budget hearing records

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22956 3
TITLE: Subcommittee reports
DATES: ca. 1970-
ARRANGEMENT: Chronological
DESCRIPTION:

Provides a record of reports made by various subcommittees assigned to research issues for the Appropriations Committee. Information includes the findings of the subcommittee, background information, proposals, committee actions, etc.

RETENTION AND DISPOSITION AUTHORIZATION:

These records have historical value(s).

APPROVED: 05/2000

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 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.

APPRAISAL:

These records have historical value(s).

This retention and disposition is based on the retention schedule approved by the Utah Legislature.

PRIMARY DESIGNATION:

Public