

Retention and Classification Report

Agency: Governor's Office of Economic Opportunity. Business Development (1825)

324 South State Street, Suite 500
Salt Lake City, UT 84111
801-538-8820

Records Officer: _____

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AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14247

1

TITLE: Adjustment forms

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Adjustments created by agency accounting officers and sent to the Division of Finance to correct errors on warrant requests and interdepartmental transfers.

RETENTION:

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

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14645

4

TITLE: Advertising correspondence

DATES: 1989-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

Correspondence between the Division of Business and Economic Development and advertising agencies facilitates efficient contract management. Information includes the status of projects contracted to advertising firms, responses to previous efforts, and similar information.

RETENTION:

Retain for 2 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1995

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

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

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14644

4

TITLE: Advertising invoices

DATES: 1991-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

Invoices, work orders, and similar documents from advertising firms retained by the Division (DBED) to facilitate efficient contract management. Information includes document dates, amounts charged, itemization of charges, and similar information. They are duplicated in DBED Accounting for billing purposes, but are held here as well to provide contract history information.

RETENTION:

Retain for 2 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1995

FORMAT MANAGEMENT:

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

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. Business Development

SERIES: 14644

TITLE: Advertising invoices

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14248

1

TITLE: American Express monitoring report

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Report generated by American Express showing expenditures made by state employees on agency American Express Cards.

RETENTION:

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

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14269

1

TITLE: Appropriation allotment files

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Allotment records showing status of obligations and allotments under each authorized organization number.

RETENTION:

Retain for 10 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 copy: Retain in Office for 10 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14244

4

TITLE: Board general correspondence

DATES: 1989-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

Correspondence of the board members primarily concerning issues of meeting attendance, placing items on the agenda, and related issues.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1995

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then destroy.

APPRAISAL:

These records have administrative value(s).

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

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14240

3

TITLE: Board of Business and Economic Development Executive Committee minutes

DATES: 1992-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.30 cubic feet.

DESCRIPTION:

This series contains the minutes, agenda, and any related documents or supporting materials associated with the meetings of the Board of Business and Economic Development Executive Committee. The information is maintained in order to document the history of the board and its decisions or conclusions.

Information includes the names of persons present, dates of meetings, items considered, and decisions or conclusions reached. Items discussed generally include the agenda for the upcoming meeting of the full board and approval/screening of task force recommendations for the board.

RETENTION:

Permanent. Retain for 3 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 3 years and then transfer to State Archives with authority to weed.

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

Sound recordings: Retain in Office until administrative need ends and then erase provided written minutes of the meeting have been approved.

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14240

TITLE: Board of Business and Economic Development Executive Committee minutes

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14243

3

TITLE: Board of Business and Economic Development legislative correspondence

DATES: 1990-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

This series contains the correspondence of the board with members of the legislature. Topics of the correspondence concern the development of legislation related to areas of responsibility of the board.

RETENTION:

Permanent. Retain for 10 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Proposed legislation records, GRS-1690.

AUTHORIZED: 12-01-1992

FORMAT MANAGEMENT:

Paper: Retain in Office for 10 years and then transfer to State Archives with authority to weed.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14241

3

TITLE: Board of Business and Economic Development member disclosure statements

DATES: 1992-

ARRANGEMENT: Alphabetical by board member surname

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

This series contains the forms or letters which disclose the involvement of members of the Board of Business and Economic Development in business with the State of Utah. They are maintained in order to comply with the requirements of the Utah Public Officers' and Employees' Ethics Act [UCA 67-16-1 et seq. (1994)]. The records include the name of the board member, home address, any firms which the member is assisting in their dealings with the state, and any firms which do business with the state for which a member is an officer. Miscellaneous related correspondence may also be included.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State employee financial disclosure reports, GRS-1923.

AUTHORIZED: 07-01-1990

FORMAT MANAGEMENT:

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

PRIMARY DESIGNATION:

Public UCA 67-16-6(2), 7(4) (2008)

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14221

1

TITLE: Board of Business and Economic Development member expense records

DATES: 1991-

ARRANGEMENT: Chronological, thereunder alphabetical by board member surname

ANNUAL ACCUMULATION: 0.30 cubic feet.

DESCRIPTION:

This series is maintained in three-ring binders and contains payroll reimbursement forms and travel reimbursement requests in part I, and copies of warrants and correspondence in part II. The records provide documentation of payments to the members of the Board of Economic Development for their attendance at board meetings. Part I includes the names of the members of the board and any staff attending; date of meeting; low organization number; meeting code; traveler home address; meal costs claimed; accounts charged; and total amounts of reimbursement sought. Part II includes name and address of the board members, social security numbers, payroll deductions, and amounts of payments. Additional miscellaneous correspondence, including letters of recusal for particular decisions may be included in Part II.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

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.

Paper: Retain in Office for 3 years and then destroy.

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. Business Development

SERIES: 14221

TITLE: Board of Business and Economic Development member expense records

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private.

Home address, social security number, payroll deductions UCA
63G-2-302(1)(e) (2008)

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 23121

3

TITLE: Business and industry directories

DATES: 1989-

ARRANGEMENT: Chronological.

DESCRIPTION:

The directory is an annual publication designed primarily to provide its users with a ready reference of Utah's major employers. It is intended as an Economic Development tool for use in evaluating the nature of Utah's employers and the Utah labor market. Data presented are obtained mainly from the records of the Utah Department of Workforce Services. Included are all employers considered to be manufacturers and those non-manufacturing establishments who employ 20 or more workers.

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.

APPRAISAL:

These records have historical value(s).

Disposition based on the historical value of the records as they document businesses within the state for specific time periods.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14270

3

TITLE: Cash receipts

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Agency copy of receipts given to customers who pay the agency for services rendered.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State government accounts payable and receivable records, GRS-1854.

AUTHORIZED: 02-11-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 7 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14231

3

TITLE: Centers of Excellence monitoring records

DATES: 1989-

ARRANGEMENT: Alphabetical by center or university name

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

This series contains correspondence and audit-related documents, created to track the progress of individuals receiving funds from the Centers of Excellence Program. Information includes project goals and criteria for evaluation, evaluation of compliance with goals, and matching funds received by the contractor from non-agency sources.

RETENTION:

Retain for 3 year(s) after expiration of contractual agreement

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1995

FORMAT MANAGEMENT:

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

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. Business Development

SERIES: 14231

TITLE: Centers of Excellence monitoring records

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Protected.

Any commercial information, trade secrets, or other valuable proprietary information; or any information which might jeopardize audit procedures [UCA 63G-2-305(1),(2),(8) (2008)]

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14288

3

TITLE: Contract purchasing files

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 2.50 cubic feet.

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:

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 copy: Retain in Office for 7 years after contract termination and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14233

3

TITLE: Copy machine reports

DATES: 1992-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

This series contains reports from the Division of Business and Economic Development (DBED) and its constituent entities to Copy Services at the Department of Administrative Services. They are maintained in order to have a properly apportioned billing for services among DBED units and to provide information necessary for the restocking of copier supplies. The report contains the date of issue, the low organization number, and the number of copies being reported.

RETENTION:

Retain for 2 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Supply management files, GRS-1987.

AUTHORIZED: 07-01-1990

FORMAT MANAGEMENT:

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

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14271

3

TITLE: Cost accounting reports

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

Reports maintained by receiving and reporting units, which document how much it costs an entity to provide a service and the fee they charge for that service.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State government accounts payable and receivable records, GRS-1854.

AUTHORIZED: 02-11-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 7 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14272

3

TITLE: Cost report data files

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Ledgers and forms used to accumulate data for use in cost reports.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

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 3 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 28710

3

TITLE: Denied applications

DATES: 1984-

ARRANGEMENT: Alphabetically by production name.

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)). Applications document requests from entities wishing to participate in technological innovation and business incentive programs, or in other projects related to economic development in Utah, which have been denied. Information includes applicant profiles, details regarding the proposed project, and related correspondence and materials.

RETENTION:

Retain until final action

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 09/2015

FORMAT MANAGEMENT:

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

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

APPRAISAL:

These records have administrative value(s).

RETENTION JUSTIFICATION:

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 28710

TITLE: Denied applications

(continued)

This retention matches that of canceled solicitation files (item 13-2) and request for proposals records (item 13-17), both of which function similarly to these records.

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 09/2015.

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14277

1

TITLE: Employee travel files

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Records relating to reimbursing individuals, such as travel orders, travel authorizations, per diem vouchers, transportation requests, hotel reservations, and all supporting records documenting official travel by officers, employees, dependents, or others authorized by law to travel.

RETENTION:

Retain for 3 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 2 years and then transfer to State Records Center. Retain in State Records Center for 1 year and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14224

3

TITLE: Ethnic Affairs staff meeting minutes

DATES: 1994-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

This series includes the minutes, agenda, and any related supporting documents for the meetings of the Division Director and the directors of all of the ethnic offices within the division. The information in this series is maintained in order to document the history of the Ethnic Affairs offices and their decisions or conclusions. These meetings occur approximately bimonthly and are concerned with human resources issues, general program coordination, and other administrative matters as needed. Information includes the names of the persons present, date and place of meeting, a summary of matters discussed, and any decisions reached.

RETENTION:

Permanent. Retain for 3 year(s) after approval of minutes

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 3 years and then transfer to State Archives with authority to weed.

Sound recordings: Retain in Office until administrative need ends or until the written minutes have been approved and then erase.

Computer data files: Retain in Office until administrative need ends or until a paper copy has been generated and then delete.

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14224

TITLE: Ethnic Affairs staff meeting minutes

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14278

3

TITLE: Expenditure accounting general correspondence and subject files

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Correspondence or subject file maintained by operating units responsible for expenditure accounting, pertaining to their internal operations and administration.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State government routine administrative correspondence, GRS-48.

AUTHORIZED: 11-18-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 7 years and then destroy.

Computer data files: Retain in Office for 7 years and then delete.

APPRAISAL:

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

PRIMARY DESIGNATION:

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

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14278

TITLE: Expenditure accounting general correspondence and subject files

(continued)

SECONDARY DESIGNATION(S):

Protected. Utah Code 63G-2-305(2) and (3) (2023)

Private. Utah Code 63G-2-302(2)(b) (2023)

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14279

1

TITLE: Financial Information Resources System (FIRMS) periodic reports

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

Includes the following: FICAA01T Trail balance monthly. FICAA05P Outstanding encumbrance. FICAA09P Outstanding reservation. FICAA10P Cash deposits. FICAA30P General ledger activity. FICAA85P Revenue and expenditure status by fund. FICAED01 Expenditure detail by sub-account. FICAES01 Expenditure status by sub-account. FICAES02 Work program/expenditure comparison by summary account. FICARD01 Revenue detail by sub-account within organization. FICARS01 Revenue status by sub-account. FICARS02 Estimated revenue/realized revenues. FICAER01 Expenditure/revenue summary by level 2. FICAMP01 Revenue account status by activity other than Department of Transportation. OBSOLETE RECORD SERIES BY 1998.

RETENTION:

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

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14279

TITLE: Financial Information Resources System (FIRMS) periodic reports

(continued)

SECONDARY DESIGNATION(S):

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

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14280

1

TITLE: Financial Information Resources System (FIRMS) year end report

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

Yearly or period 13 edition of FIRMS reports. OBSOLETE RECORD
SERIES BY 1998.

RETENTION:

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

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

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

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14281

1

TITLE: Inter-departmental transfer requests

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

An accounting document that requests the transfer of funds between agencies for services rendered or materials purchased.

RETENTION:

Retain for 3 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 3 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14234

3

TITLE: Mailing lists

DATES: 1991-

ARRANGEMENT: Alphabetical by surname

DESCRIPTION:

Computerized WordPerfect files of mailing lists which facilitate communication with members of the Board of Business and Economic Development. The lists include the names, home addresses, and office addresses of members of the board. Different files may maintain identical information in different formats.

RETENTION:

Retain until superseded

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1995

FORMAT MANAGEMENT:

Computer data files: Retain in Office until obsolete or superseded and then delete.

APPRAISAL:

These records have administrative value(s).

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

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14234

TITLE: Mailing lists

(continued)

SECONDARY DESIGNATION(S):

Private. Home addresses [UCA 63G-2-302(1)(e) (2008)]

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14230

3

TITLE: Opinions of counsel

DATES: 1993-

ARRANGEMENT: Alphabetical by name of requesting agency

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

This series contains the opinions offered by Department of Community and Economic Development (DCED) counsel in response to requests from DCED executives. These opinions may concern any matter which arises and is pertinent to the administration of DCED, its agencies, or its programs.

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 Legal counsel records, GRS-1721.

AUTHORIZED: 06-01-2015

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years 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. Business Development

SERIES: 14230

TITLE: Opinions of counsel

(continued)

SECONDARY DESIGNATION(S):

Protected.

Any opinions concerning specific litigation or threats of specific litigation [UCA 63G-2-305(15)-(17)].

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14282

3

TITLE: Petty cash records

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.40 cubic feet.

DESCRIPTION:

Records which verify all monies received or expended through a petty cash account. Includes cash receipts, adding machine tapes, daily accounting records, reconciliation, transmittals, etc.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State government accounts payable and receivable records, GRS-1854.

AUTHORIZED: 02-11-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 29646

3

TITLE: Press releases

DATES: 2008-

ARRANGEMENT: Chronological.

DESCRIPTION:

These records support the agency's function to promote industry and facilitate economic development in the state by actively creating, developing, attracting, and retaining business, industry, and commerce (Utah Code 63N-1-201(2) and (3) (2017)). These are statements issued to the press for release about the participants, management, and effectiveness of programs administered by the agency. Information may include names and profiles of incentivized companies, details of agreements and plans, quotes from company and agency executives, statistics and accolades, changes in leadership, and similar types of information.

RETENTION:

Permanent. Retain for 3 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Public relations records, GRS-1716.

AUTHORIZED: 12-01-2014

FORMAT MANAGEMENT:

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

Computer data files: Retain in Office permanently.

APPRAISAL:

These records have administrative, and/or historical value(s). Records document the effectiveness of agency programs and the agency's interaction with businesses and the public over time.

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 29646

TITLE: Press releases

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2018.

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 82878

4

TITLE: Private Activity Bond Review Board case files

DATES: i 1984-

ARRANGEMENT: Alphanumerical by date and applying agency.

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

This series contains applications submitted by political subdivisions on behalf of the project owner/operator requesting allocation of volume cap for tax-exempt bonding. These applications are maintained to document the requests of political subdivisions which issue Private Activity Bonds for these projects for private owners using their tax-exempt status. Information included in the application includes name of the political subdivision, project summary, name of owner/operator of the project, confidential information on project owner/operator, amount of bonds requested, confidential financing terms of the project, amount of volume cap allocated, certificates of allocation, legal documentation of bond sale, IRS Filings of Bond Sale, Inducement and TEFRA Resolution, political subdivision public meeting minutes, engineering reports, impact studies and statements, architectural plans, drawings, detailed costs of project, related correspondence, and related documents.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after approval of allocation and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 82878

TITLE: Private Activity Bond Review Board case files

(continued)

APPRAISAL:

These records have administrative value(s).

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

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Protected. UCA 63G-2-305(1)

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 23333

3

TITLE: Publications

DATES: 1986-

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 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.

APPRAISAL:

These records have historical value(s).

Publications document the history of the agency and provide the public information about services and programs provided by the state.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14905

3

TITLE: Requests for proposal

DATES: 1981-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These records are solicited and unsolicited unsuccessful bids and proposals to provide products or services to an agency by a private contractor.

RETENTION:

Retain for 6 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Request for proposal records, GRS-1991.

AUTHORIZED: 12-21-2018

FORMAT MANAGEMENT:

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

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14220

3

TITLE: Staff meeting minutes

DATES: 1992-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

This series includes the minutes, agenda, and any related supporting documents for the meetings of the Division Director and the directors of all of the subordinate agencies within the division, excluding the ethnic offices. The information in this series is maintained in order to document the history of the Division of Business and Economic Development and its decisions or conclusions. These meetings occur approximately bimonthly and are concerned with human resources issues, general program coordination, and other administrative matters as needed. Information includes the date and place of meeting, names of the persons present, a summary of the matters discussed, and any decisions reached.

RETENTION:

Permanent. Retain for 3 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 3 years and then transfer to State Archives with authority to weed.

Sound recordings: Retain in Office until administrative need ends and then erase provided written minutes of the meeting have been approved.

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

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14220

TITLE: Staff meeting minutes

(continued)

APPRAISAL:

These records have historical value(s).

Minutes document decisions made by the agency. These records have research value.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14285

1

TITLE: Stores accounting files

DATES: 1988-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.30 cubic feet.

DESCRIPTION:

Files used for the acquisition of items purchased through the Division of Central Stores. Information includes accounting records and returned items form.

RETENTION:

Retain for 3 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 2 years and then transfer to State Records Center. Retain in State Records Center for 1 year and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14226

3

TITLE: Subordinate agency oversight records

DATES: 1992-

ARRANGEMENT: Alphabetical by agency name, thereunder chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Quarterly budget reports, monthly activity reports, statements of agency goals, and correspondence in three-ring binders relating to oversight of subordinate agencies by the division administration. Quarterly budget reports include expenditure descriptions, fiscal year budget, comparisons of budgeted and actual expenditures, encumbrances, and balances remaining unencumbered. Monthly activity reports comprise the second section of each binder. These reports include a summary of staff activity for each month, including meetings, training, projects underway, and projects planned or completed during the month. Agency goals include action plans, quantifiable goals, budget goals, and programmatic objectives. Miscellaneous correspondence between the division and agency, and copies of selected letters of import from the agencies to outside entities are included.

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: 06/1995

FORMAT MANAGEMENT:

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

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14226

TITLE: Subordinate agency oversight records

(continued)

APPRAISAL:

These records have historical value(s).

This disposition is based on the historical value of this information which is not fully duplicated elsewhere.

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14286

3

TITLE: Telephone bills

DATES: 1988-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION: 0.40 cubic feet.

DESCRIPTION:

Bills which document calls made from state offices and state cellular phones. Bills also include the number called and the length, time, and date of phone call.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State government accounts payable and receivable records, GRS-1854.

AUTHORIZED: 02-11-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2019.

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 25827

3

TITLE: Utah Incentives Program audit records

DATES: 1991-

ARRANGEMENT: Chronological by audit date.

ANNUAL ACCUMULATION: 10.00 cubic feet.

DESCRIPTION:

The State of Utah through the Governor's Office of Economic Opportunity offers a variety of incentives to companies either expanding within the state or companies looking to move into Utah. These incentive programs include the Industrial Assistance Fund, the Film Incentives Fund, and the Tax Increment Funds. These records include verification records required for disbursement of the incentives, verification of milestones such as construction and employment, and receipts of dollars spent in the state. All detailed documents include summaries.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/2005

FORMAT MANAGEMENT:

Paper: Retain in Office until final disbursement and then transfer to State Records Center. Retain in State Records Center for 7 years and then destroy.

CD-ROM: Retain in Office until final disbursement and then transfer to State Records Center. Retain in State Records Center for 7 years and then destroy.

Computer data files: Retain in Office for 7 years after final disbursement and then delete.

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 25827

TITLE: Utah Incentives Program audit records

(continued)

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2015.

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14287

3

TITLE: Warrant requests

DATES: 1988-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION: 2.50 cubic feet.

DESCRIPTION:

Requests from state agencies to the Division of Finance to pay vendors for supplies and/or services the vendors have provided to the agencies.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State government accounts payable and receivable records, GRS-1854.

AUTHORIZED: 02-11-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Governor's Office of Economic Opportunity. Business Development

SERIES: 14287

TITLE: Warrant requests

(continued)

SECONDARY DESIGNATION(S):

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

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2019.