

# Retention and Classification Report

**Agency:** Utah State Office of Education. School Finance and Statistics  
Section (1449)  
250 East 500 South  
Salt Lake City, UT 84114  
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## Records Officer

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**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 19986

3

**TITLE:** Annual Data Acquisition Calendars

**DATES:** 1992-1996.

**ARRANGEMENT:** Chronological by fiscal year.

**DESCRIPTION:**

These calendars are intended to make the reporting of data required by the Office of Education a more manageable task for local school districts. The calendar contains a list of reports by month and due date which all school districts will complete throughout the school year.

**RETENTION:**

Retain until administrative need ends

**DISPOSITION:**

Permanent. 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 administrative value(s).  
These calendars appear to have only temporary administrative value and need be kept until superseded by a new calendar.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 20376

3

**TITLE:** Annual program report

**DATES:** 1972-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

The Annual Program Report (APR) is an account of Local Education Agency (LEA) revenue and expenditures by source and program sufficient to meet the reporting requirements specified in Section 53A-1-301(3)(d) and (e). The information for this report is gathered from LEAs annually by October 1st.

**RETENTION:**

Retain until administrative need ends

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 10-01-2013

**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.

Computer data files: 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.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 20376

**TITLE:** Annual program report

(continued)

**APPRAISAL:**

These records have historical value(s).  
Publications document agency history and functions. They have  
ongoing research value.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 25457

3

**TITLE:** Annual School Finance and Statistics Workshop Book

**DATES:** 1979-2008.

**ARRANGEMENT:** Chronological by date

**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:**

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

**AUTHORIZED:** 10-01-2013

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

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

Provides historical statistics, financial information, audit guidelines and more about schools in Utah.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83271

3

**TITLE:** Annual school fall enrollment files

**DATES:** 1964-

**ARRANGEMENT:** Alphabetical by district

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

This file is used to document student attendance in all public and private schools. This information is used in compiling the Fall Enrollment Report of Utah School Districts and in the distribution of monies to the districts. This includes a breakdown of attendance and enrollment by grade, gender, and whether handicapped or home bound. It also contains a racial breakdown, but only in total attendance and not by grade.

**RETENTION:**

Retain for 5 year(s) after completion of publication or report

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 2 years after report is published and then transfer to State Records Center. Retain in State Records Center for 3 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.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83271

**TITLE:** Annual school fall enrollment files

(continued)

**APPRAISAL:**

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

This retention is based on the administrative needs expressed by the business office and the historical value of these records in understanding the numbers of students in each district.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 11328

3

**TITLE:** Audit reports

**DATES:** 1970-

**ARRANGEMENT:** Alphabetical by school district

**DESCRIPTION:**

This series consists of several audit reports maintained by School Finance: the Financial Audit Report, aka Comprehensive Annual Financial Report (CAFR), which includes audited financial statements, financial statements, reviewed financial statements or State Auditor's form (UCA 53A-3-404, 51-2a-201, 203, R277-484-3(k)); the MSP Selections Report, which is prepared by the Local Education Agency (LEA) external auditors identifying what programs within the Minimum School Program were audited; the Single Audit Report, which is required for certain LEAs whose federal revenues and/or expenditures exceed a certain level; as well as Student Membership and Fall Enrollment and Transfer Student Audit Reports, which are prepared by the LEA's external auditors identifying compliance with pupil accounting rules in reporting student membership, fall enrollment and transfer students in the clearinghouse submission (UCA 53A-191-101, R277-484-3(F)(1),

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 03-01-2016

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then microfilm and destroy provided microfilm has passed inspection.

Microfilm master: Retain in State Archives permanently.

Microfilm duplicate: Retain in Office permanently.



**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 11328

**TITLE:** Audit reports

(continued)

**APPRAISAL:**

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

Audit reports may be used during the next audit cycle to monitor compliance with internal control program recommendations. They document agency functions and have research value.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 10653

3

**TITLE:** Budgeting, accounting, and auditing handbooks

**DATES:** 1952-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These manuals are designed to provide uniform accounting terminology and procedures for Utah school districts. The reports contain information pertaining to accounting, auditing, budgeting and coding.

**RETENTION:**

Retain until administrative need ends

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 10-01-2013

**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 administrative, and/or historical value(s).  
Records in this series have historic value.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 10653

**TITLE:** Budgeting, accounting, and auditing handbooks

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83767

1

**TITLE:** Building projects records

**DATES:** 1978-

**ARRANGEMENT:** Alphabetical by district

**ANNUAL ACCUMULATION:** 0.20 cubic feet.

**DESCRIPTION:**

This series contains a collection of forms, a checklist, and other materials required by UCA 53A-21-118 (1989) to document the approval of plans and specifications of each building or remodeling project. The check list includes school name, district, project description, file number and date, project type, square footage, architect, and a check list of information and forms that are required to complete these files.

These files include the SBE-06-2530-64C Room File form (which includes district code, school code, building code, school name, room number, square footage, room location code, total teacher stations, and the room design code), form SP-4 or SOE-06-2530-65 the Preliminary Information on Proposed School Plant Construction (which has information on the nature of the project; school name; location and district; square footage; architect's name, address, and phone number; and state building aid funds to be used in construction and the preliminary cost estimates); SP-5 or SOE-06-2530-66 the Final Plans Data on Proposed School Plant Construction (which has information on the school name, location, grades, district, architect, nature of project, scheduled completion, number of special instructional rooms and type, regular rooms, other support staff requirement, total number of required rooms, date final plans signed, file number, and actual bid costs); SP-5a or SOE 06-2530-61 Architects School District's Certifications (which includes the school name, location, architect and contract architect signature of certification, also the school districts superintendent's signature as to certification); SOE 06-2530-62 Request for Withdrawal from the Critical School Building Aid Fund (school districts provide this financial information when they wish to withdraw from the fund); SOE 06-2530-63 Request for Withdrawal from the Continuing School Building Aid Fund (school districts provide this financial information when they wish to withdraw from this fund); form SP-6 Final Report on Building Project Cost (which includes school district, school, location, date of contract, date of completion, nature of project, square footage following construction, teacher stations, costs with breakdown, and the prime contractors); form SP-7 Existing Facilities Survey (which includes structural report of facility, school, type of construction, and includes a list of check point information); form SP-8 on Heating and Ventilating (which includes school, type of construction, and has them look

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83767

**TITLE:** Building projects records

(continued)

at these two major concerns asking for comments and whether replacements are needed and what the repairs might be); and lastly SP-10 Educational Space (which includes information regarding the classroom needs, such as what are the standard conditions or what is lacking and the changes that are necessary or required).

**RETENTION:**

Retain for 7 year(s) after end of project or program

**DISPOSITION:**

Permanent. Transfer to Archives.

**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 after completion of project 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 historical value(s).  
This retention is based on the historical significance of the information to researchers.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83763

3

**TITLE:** Eligible and ineligible transported pupils files

**DATES:** 1970-

**ARRANGEMENT:** Alphabetical by school district

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These files provide information regarding all school bus routes in a particular district for documentation and provide required information for funding. Information includes bus numbers, routes, actual eligibles transported (including special education students) in elementary and secondary, total eligibles, and the number of actual eligibles. This information is duplicated on a computer printout.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 6 months or until information is transferred to the computer file and then destroy.

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

**APPRAISAL:**

These records have administrative value(s).

This retention is based on the administrative needs expressed by the office. No specific state statute nor federal guidelines were identified which indicate a retention period.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83763

**TITLE:** Eligible and ineligible transported pupils files

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83272

3

**TITLE:** Fall school enrollment reports

**DATES:** 1953-2005.

**ARRANGEMENT:** Chronological by year

**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:** 10-01-2013

**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.

Computer data files: Retain in Office for 1 year or until yearly update and then delete.

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, and/or historical value(s). This retention is based on the administrative needs expressed by the office and the historical value of this report to document the education and district activities in Utah.



**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83272

**TITLE:** Fall school enrollment reports

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 4063

3

**TITLE:** Five-year school building program files

**DATES:** 1975-2001.

**ARRANGEMENT:** Alphabetical by district.

**DESCRIPTION:**

These files document the population projections of schools for every five years. The information is then used to develop five-year building plans. Information includes school name, priority, grades, additional capacity requirements, types of projects, estimated costs, and location.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative, and/or historical value(s). This series would be valuable to historical researchers in understanding the building projections for the state of Utah.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83273

3

**TITLE:** Intentions and accomplishments of Utah high school graduates files

**DATES:** 1964-before 2011.

**ARRANGEMENT:** Alphabetical by school district, thereunder by school  
**DESCRIPTION:**

These files include information on high school seniors and their plans following graduation. The information is collected for the Board of Regents and is compiled into the report September intention of Utah high school seniors (series 83274). Students are asked to identify if they are planning on attending college and if they are they are asked for information on the school or college they are planning on attending, why that selection was made, and the type of education program they intend to complete; if they have indicated that they are not going to further their education they are asked for information on employment plans, military plans, marriage, or future plans. They are asked to provide information on high school accomplishments, types of classes taken, identification of high school program followed, sex, ethnic or racial background and grade point average. During the 1989-90 school year the Office of Education revised some of the information they request and students are no longer required to provide personal information, but that information is optional.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year or until report is completed and then destroy.

**APPRAISAL:**

These records have administrative value(s).  
This retention is based on the administrative needs expressed by the office.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83273

**TITLE:** Intentions and accomplishments of Utah high school graduates files

(continued)

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private. Address of student.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 1436

3

**TITLE:** Minimum school program reports

**DATES:** 1957-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These reports are for the benefit of those who are interested in making analyses, comparisons and doing research on the Minimum School Programs of the state school districts. These reports include legislative estimates and mid-year updates. Prior to 1990, this report was published annually. After 1990, the report is published bi-annually with estimates issued in the spring and actual data issued in the fall.

**RETENTION:**

Retain until administrative need ends

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 10-01-2013

**FORMAT MANAGEMENT:**

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

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

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

Digital image: Retain in Office until administrative needs end and then delete.

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

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

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 1436

**TITLE:** Minimum school program reports

(continued)

**APPRAISAL:**

These records have historical value(s).  
Publications document agency history and functions. Publications  
have ongoing research value.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83758

3

**TITLE:** New bus route change approval request files

**DATES:** 1970-

**ARRANGEMENT:** Chronological.

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

This is a request for approval from the School Board to change bus routes that are providing transportation to and from schools. It includes the date of request, district request came from, effective date of new route or change in existing route, authorized signature, information on existing route, how that would change, type of route, ineligible students that are transported on the existing bus route and how the possible change would affect those students, and a short test for appreciable increase in cost for change or new route. This request has additional space for approval or denial and is sent to the Pupil Transportation Section at the Board of Education for their review.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative value(s).  
This retention is based on the administrative needs expressed by the office.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83758

**TITLE:** New bus route change approval request files

(continued)

**PRIMARY DESIGNATION:**

Public



**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 23943

3

**TITLE:** School building construction and inspection resource manuals

**DATES:** 2000-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

This series contains resource manuals that are distributed to school districts throughout the state. The manuals provide district officials with guidelines for the design and construction of new facilities, and for managing existing facilities. The manual was first produced in October 2000. Periodic updates or revisions are included in the series.

**RETENTION:**

Retain until administrative need ends

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**AUTHORIZED:** 10-01-2013

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have historical value(s).  
Publications document agency history, functions, and decisions.  
Publications have ongoing research value.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 23943

**TITLE:** School building construction and inspection resource manuals

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83766

3

**TITLE:** School building program district-wide population projection files

**DATES:** 1950-1986.

**ARRANGEMENT:** Alphabetical by school district

**DESCRIPTION:**

These files provide varied information to the Board of Education regarding the building needs of the districts. Included are form CSBP-1 titled School Building Program District-Wide Population Projection (which requests projections from 0-1 year old, kindergarten through twelfth grade); form CSBP-2 titled School Building Program Date-List of Existing School Buildings in District (it gives the particulars on a building such as grades housed, number of teachers, acres in site, year built and years of additions, condition of building, is it being considered for year round school, estimated cost to air-condition); form CSBP-3 the Five-Year School Building Program (includes school name, priority, grades, additional capacity requirements, types of project, estimated costs and location); form CSBP-3a Five-Year School Building Program Non-Instructional Facilities (includes priority number, intended use of building, date needed, location, and estimated costs); form CSBP-3b Site Acquisition Program (includes priority listing, type of school, school population, number of acres, estimated cost, expected date of construction, and date of acquisition); form CSBP-4 Debt Service Data is filled out for the school year (includes school district, monetary estimates of value and need, bonds information and how payments will be sold and made); form CSBP-5 Alternatives To School Building Construction (includes district information, information on what school district intents are, alternate solutions to building needs that can be implemented and comments); form CSBP-6 District Classroom Data (includes information on district, what is required in that district for each level of education to alleviate the over crowding problems which the state is encountering); form CSBP-7 Summary Five-Year Costs for School Facilities (is a breakdown of what funds each district will require to be able to accomplish there mission). This file also includes a School District Population Survey which is filled out on each family in the school district and it includes information of family head, number of children under 18, street number, city, area number, date, block number, type of dwelling, date of construction, occupancy, residence, lists children in family unit, age, sex, relationship, school attending, also information on the adults in the family, and why any person between the ages of 16-18 are not in school.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83766

**TITLE:** School building program district-wide population projection files

(continued)

**APPROVED:** 09/1990

**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.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s). This retention is based on the administrative needs expressed by the office.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83760

3

**TITLE:** School bus driver training certification file

**DATES:** 1970-

**ARRANGEMENT:** Alphabetical by district

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These files are maintained on anyone driving a bus for a school district in the state of Utah. They document that drivers have been certified to drive school buses and also provide information on all applicable training that has been received. The files could include the form SOE 06-2552-75, which states the school district, date, driver's name, type of employment that the driver has (part-time or a regular full-time driver), training courses completed and date of completion, information on whether the driver is a state certified driver trainer, and a motor vehicle check result on each driver, and a signature line for who verified this information with Motor Vehicles. They might also include form SOE 06-2552-74, which is a sign-in sheet for courses and includes information on which courses have been completed and by whom, and is signed by the Certified Driver Trainer and includes their certification number.

**RETENTION:**

Retain for 7 year(s) after after separation

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 7 years after termination of driver and then destroy.

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

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83760

**TITLE:** School bus driver training certification file

(continued)

**APPRAISAL:**

These records have administrative, and/or legal value(s).  
This retention is based on the administrative needs expressed by  
the office and to document that all drivers are certified and  
have been certified for that position.

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private. Social Security Number

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83275

3

**TITLE:** School district annual statistical report files

**DATES:** 1969-

**ARRANGEMENT:** Alphabetical by school district

**ANNUAL ACCUMULATION:** 1.50 cubic feet.

**DESCRIPTION:**

These are the reports that are filled out by each school district and returned to the Business office. They are used to compile the Annual Statistical Report. These reports include an accounting of enrollment of all students enrolled and attending Federal and State adult basic education and adult high school completion programs. These figures are all certified. It also includes the number of participants by sex, age range, grade level, race, selected ethnic groups, and also by functional grade levels. It contains an accounting of the number of participants leaving the program and the reason associated with that. The report provides information on the adult basic and high school program. Included are authorized course titles; total number of units of adult basic credit awarded from all sources by program categories and by authorized course title; profile of education participant; the number of participants; and number of daytime and evening classes by type of location, number of personnel organizations, placement and type of job performed by amount of training, involvement (discussion and planning involvement) processes, new courses, services and activities initiated from this public involvement, continuing courses, and services and activities.

These reports are then compiled into the Annual statistical report of Utah school districts (series 83276) which is published each year.

**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:** 05/2001

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83275

**TITLE:** School district annual statistical report files

(continued)

**FORMAT MANAGEMENT:**

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

Microfiche master: Retain in Archives for 5 years and then destroy.

Microfiche duplicate: Retain in Archives for 5 years and then destroy.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s). This retention is based on the administrative needs expressed by the office. No specific state statute nor federal guidelines were identified which indicate a retention period. The State Office of Educations receives the S-3 report from all forty school districts and then creates an annual report from the data.

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private. Name and social security number.



**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83276

3

**TITLE:** School district annual statistical reports

**DATES:** 1937-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

This annual report is prepared by the Office of Education and provides a detailed presentation of pupil and staff statistical information for the forty school districts in the State of Utah. Data in the report are gathered directly from the forty school districts at the end of each school year. The information for this report is taken from the S-3 form, and the intent is to provide raw data needed for accurate and detailed analysis of the needs of each school district.

**RETENTION:**

Retain for 5 year(s) after completion of publication or report

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 05/2001

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years after report is published 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.

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

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

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83276

**TITLE:** School district annual statistical reports

(continued)

**APPRAISAL:**

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

This disposition is based on the historical value of the information. It summarizes information in other files and would save researchers a great deal of time.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 10818

3

**TITLE:** School district budget bulletins

**DATES:** 1964-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

This series contain budget estimates for the school districts in Utah. The reports contain information pertaining to fund balances, revenue, and expenditures.

**RETENTION:**

Retain until administrative need ends

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 10-01-2013

**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 value of records which provide school district budgets including revenues and expenses.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 10818

**TITLE:** School district budget bulletins

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83277

3

**TITLE:** School districts annual financial report

**DATES:** 1930-

**ARRANGEMENT:** Chronological, thereunder alphabetical by school district.

**ANNUAL ACCUMULATION:** 0.60 cubic feet.

**DESCRIPTION:**

The Annual Financial Report (AFR) is an account of Local Education Agency (LEA) revenue and expenditures by source and fund sufficient to meet the reporting requirements specified in Utah Code 53A-1-301(3)(d) and (e). The information for this report is gathered from each LEA annually by October 1st.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Permanent. 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:** 12-01-2016

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 2 years and then microfilm and destroy provided microfilm has passed inspection.

Microfilm master: Retain in State Records Center for 5 years and then transfer to State Archives.

Microfilm duplicate: Retain in Office for 5 years and then destroy.

Paper: For records beginning in 1979 through 1987. Retain in State Archives until microfilmed and then destroy provided microfilm has passed inspection.

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

Microfiche duplicate: Retain in State Archives permanently with

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83277

**TITLE:** School districts annual financial report

(continued)

authority to weed.

Computer data files: Retain in Office for 7 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

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

Budgets document the use of public funds.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 13859

3

**TITLE:** School transportation electronic system data

**DATES:** 1975-

**ARRANGEMENT:**

**DESCRIPTION:**

These computer data are used by School Finance and Statistics to track how many bus route miles districts have logged, the average cost per mile, and number of students transported. The information is created within the framework of the School transportation electronic system (series 13699).

**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:** 05/2001

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative, and/or fiscal value(s). This disposition is based on the administrative needs expressed by the agency and by general audit requirements of financial records.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 13859

**TITLE:** School transportation electronic system data

(continued)

**PRIMARY DESIGNATION:**

Public



**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83274

3

**TITLE:** September intentions of Utah high school seniors report

**DATES:** 1964-before 2011.

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

This report is prepared at the request of the Board of Regents and provides a statistical understanding of students' plans. This report includes longitudinal trends and intentions of high school seniors by district, and preferences for specific post-secondary institutions. A summary of the particular year's information is collected from Intentions and accomplishments of high school graduates files (series 83273). The reports provide a ten-year chart of intentions showing breakdown of post-secondary education, work, military, marriage, etc., and also shows influence of student recruitment and how that affected the student's choice.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative, and/or historical value(s). This retention is based on the administrative needs expressed by the office and the historical value of these studies to provide statistical information on high school seniors.

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 4066

3

**TITLE:** Small school applications

**DATES:** 1978-

**ARRANGEMENT:** Alphanumerical by school district

**ANNUAL ACCUMULATION:** 0.20 cubic feet.

**DESCRIPTION:**

These applications are required to determine if schools qualify for small school monies. It includes school district, school name, grade span, estimated enrollment and average daily membership (ADM) for kindergarten and grades one through twelve, and superintendent's signature.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**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 destroy.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s). The office has indicated that the disposition is based on the needs of the office.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 4066

**TITLE:** Small school applications

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 4059

3

**TITLE:** Summer vocational program planning and final report files

**DATES:** 1980-2011.

**ARRANGEMENT:** Alphabetical by school district

**DESCRIPTION:**

This report is filled out in two parts, the first part is completed at the beginning of the school year and the second part is completed at the end of the school year. The purpose of this information is to determine what monies the district will be receiving each year according to what has been previously reported. It includes the names of the district, school, and teachers. The first part discusses preliminary planning and includes course period number, assigned course number (CIP), vocation course title, whether it meets standards, and enrollment estimates for elementary as well as secondary. The second part is the final report and includes the actual enrollment for elementary and secondary, number of weeks in program, weighted pupil unit (WPU), Vocational Education use (USOVE USE), and final approval.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**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 administrative, and/or fiscal value(s). This disposition is based on the administrative needs expressed by the office and reflects the fiscal needs as well.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 4059

**TITLE:** Summer vocational program planning and final report files

(continued)

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private. Teacher's Social Security number

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 4265

3

**TITLE:** Transporting handicapped students budget files

**DATES:** 1970-

**ARRANGEMENT:** Chronological, thereunder alphabetical by school district

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These budget files are maintained for each school district to document the number of handicapped students transported to classes and the funds requested to facilitate the service. These requests would include the completion of either the Budget Request for Transporting Severely Multiple-Handicapped Students to Extended Year Classes (form number SOE 06-2522-03) or the Budget Request for Transporting Pre-School Three and Four Year Old Handicapped Students (form number SOE 06-2522-04). These files include information on the number of qualified students, the budget amount requested, person responsible for the program at the district level, total number of miles traveled, and the yearly estimate cost per bus mile.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative, and/or fiscal value(s). This disposition is based on agency need as the audit would occur within three years.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83768

3

**TITLE:** Uniform budget report for school districts

**DATES:** 1973-1990.

**ARRANGEMENT:** Alphabetical by district name

**DESCRIPTION:**

This report identifies the funding levels and expenditures for education in Utah. The information for this report is gathered from each of the school districts by a large booklet which contains numerous pages of information regarding their financial needs in a year's period. The record includes comparative statistical data, summary statement of revenues, expenditures, changes in unappropriated fund balances, unrestricted grants-in-aid, minimum school programs, uniform school district budget reports broken down by revenues, sources, and expenditures by line item and fund. The last page of the report is a detail schedule of property tax.

The reports are collected from each district, the district is responsible for the preparation of the report and the Office of Education compiles the information into this report and provides this information as requested.

The Uniform budget report for school districts (series 83768) and the School districts annual financial report (series 83277) were combined by the Utah State Office of Education in 1990.

**RETENTION:**

Retain for 10 year(s)

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 09/1990

**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 transfer to State Archives with authority to weed.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83768

**TITLE:** Uniform budget report for school districts

(continued)

**APPRAISAL:**

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

This retention is based on the administrative needs expressed by the office and provides documentation on the funding levels and expenditures for education in the state of Utah. It provides a helpful research tool.

**PRIMARY DESIGNATION:**

Public



**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83765

3

**TITLE:** Vocational program planning and final report file

**DATES:** 1940-before 2011.

**ARRANGEMENT:** Alphabetical by school district

**DESCRIPTION:**

This report is filled out in two parts. The first part is completed at the beginning of the school year (due by the first of October) and the second part at the end of the year (due at the end of June). The purpose of this information is to determine what monies the district will be receiving each year according to what they reported previously. It includes information such as district, school, and teachers. The first part is the preliminary planning and includes course period number, assigned course number (CIP), vocational course title, whether it meets standards, and enrollment estimates for elementary as well as secondary. The second part is the final report and includes the actual enrollment for elementary and secondary, the membership (aggregate), field for Vocational Education use (USOVE USE), and final approval.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 05/2001

**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 administrative, and/or fiscal value(s). This disposition is based on the administrative needs expressed by the office and reflects the fiscal needs as well.

**AGENCY:** Board of Education. Office of Education. School Finance Section

**SERIES:** 83765

**TITLE:** Vocational program planning and final report file

(continued)

**PRIMARY DESIGNATION:**

Public

**SECONDARY DESIGNATION(S):**

Private. Teacher's Social Security Number