

Retention and Classification Report

Agency: Salt Lake City School District (Utah). Business Services (1591)
440 East 100 South
Salt Lake City, UT 84111-1891
801-578-8334

Records Officer: Britta Barney

84681 *Administrative staff minutes
84496 Administrative subject files
84502 *Annual financial report
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84701 *Tax anticipation notes and bond files
84704 Uniform school budget reports
84702 *Unsuccessful insurance bids

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84681

4

TITLE: Administrative staff minutes

DATES: i 1976-1982.

ARRANGEMENT: Chronological

DESCRIPTION:

These are copies of minutes of administrative staff meetings. The meetings concern issues and problems of daily business and administration of the Salt Lake City School District. The minutes include the time and place of the meetings, names of persons present, and items discussed. The minutes are taken by the superintendent's office.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 1 year or until until administrative need ends and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the office. The Superintendent's Office maintains the record copy of these minutes.

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84496

4

TITLE: Administrative subject files

DATES: i [ca.1952]-

ARRANGEMENT: Alphabetical by subject

ANNUAL ACCUMULATION: 8.00 cubic feet.

DESCRIPTION:

These files are used by the business coordinator for reference purposes and to support the daily activities of the business office. They contain various types of information including correspondence, reports, brochures, flyers, and news clippings. They concern a wide range of topics: accounting; adult high school; art inventory; bonds and bonding; budget; career ladder information; civil rights; Consolidation study; committees; computers; data processing; earthquake information; equipment information; financial statements; food services; government information; graduation requirements; historical preservation; human affairs; insurance; juvenile courts; legislature; motor vehicle numbers; pedestrian safety; personnel changes; policies; productivity proposals; recreation; requisitions; student travel; textbooks; transportation; Utah League of Women Voters; Wage and Price Standards; and zoning changes.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

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Paper: Retain in Office for 1 year or until updated and superseded and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the office.

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84496

TITLE: Administrative subject files

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84502

4

TITLE: Annual financial report

DATES: i 1971-1976.

ARRANGEMENT: Chronological

TOTAL VOLUME: 0.20 cubic feet.

DESCRIPTION:

This was a three-part annual report (Annual Financial, Program Section, and Vocational Education) completed by the district's business office for the previous fiscal year. It was submitted by the school district to the State Office of Education School Finance and Business Section. The report was used to create the Office of Education's annual report and to determine allotted funds due to the school district. It is now obsolete and has been replaced by the F-16 report.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

This retention is based on the administrative needs expressed by the office. All copies are now obsolete and should be destroyed.

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84666

4

TITLE: Educational program and services pamphlets

DATES: i 1965-1977.

ARRANGEMENT: None

TOTAL VOLUME: 0.10 cubic feet.

DESCRIPTION:

These are brochures and pamphlets published by the Salt Lake City School District. They are used to enhance public awareness of the various programs and services offered by the school district. They include various topics of interest to the general public and parents of school children. Some of the topics include the services available at the district's administration building, district policies, and available programs, pupil services, and the Rainbow Honor Society.

STATE RECORDS COMMITTEE STATUS:

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FORMAT MANAGEMENT:

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Paper: Retain in Office for 1 year or until outdated or superseded and then transfer to State Archives with authority to weed.

APPRAISAL:

Historical

This retention is based on the historical value of these publications to document the programs and services offered by the school district. These publications are no longer needed administratively and have been transferred to the State Archives.

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84666

TITLE: Educational program and services pamphlets

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84695

4

TITLE: Equipment standards and planning guidelines

DATES: i 1986-

ARRANGEMENT: Alphabetical by school name

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These standards are provided by the district's Equipment Planning Committee for each elementary, intermediate and high school. The purpose of these standards is to ensure equitable distribution of resources. The standards are broken down by subject and include a detailed description of each item, how many are allowed, and the estimated cost. The notebook also includes completed equipment and furniture budget planning guides, request forms, as well as notes concerning whether or not the item requested had been approved.

STATE RECORDS COMMITTEE STATUS:

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FORMAT MANAGEMENT:

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Paper: Retain in Office for 1 year or until outdated or superseded and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the business coordinator.

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84662

4

TITLE: Legal files

DATES: i 1961; 1971-1986.

ARRANGEMENT: None

TOTAL VOLUME: 0.10 cubic feet.

DESCRIPTION:

These files contain correspondence with the district's attorneys and others concerning legal opinions. They include research performed by the various law firms hired by the district, legal opinions written to address questions from the school board or the business office, notes from the business office concerning the legal opinions, and policy statements from the State Board of Education. Though some of these legal opinions are similar to those found in the Superintendent's Office, many are different.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

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

APPRAISAL:

Historical

This retention is based on the administrative needs expressed by the business coordinator and the historical value of these records to document the legal advice provided to the district.

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84664

4

TITLE: Monthly accounting printouts

DATES: i 1987-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These monthly computer printouts contain a current accounting of the school district's revenues and expenditures. They are broken down by fund, object code, and programs. The printouts log not only actual revenues and expenditures but also the original and current budget estimates.

RETENTION:

Retain 2 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the business coordinator.

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84664

TITLE: Monthly accounting printouts

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84694

4

TITLE: Personnel directories

DATES: i 1893-1908; 1931-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These are address and telephone directories used by the employees of the Salt Lake City School District for both professional and personal purposes. The directories include the address and telephone numbers, and names of all schools and other offices within the district. They also include all personnel, their jobs within the district, home address and telephone number.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative Historical

This retention is based on the administrative needs of the department. All previous issues (1893-1988) have been transferred to the State Archives and the Superintendent's Office has placed the State Archives on their mailing list to receive new issues.

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84694

TITLE: Personnel directories

(continued)

SECONDARY CLASSIFICATION(S):

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

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84679

4

TITLE: Procedures manual

DATES: i 1982-

ARRANGEMENT: Numerical by subject code

ANNUAL ACCUMULATION:

DESCRIPTION:

This manual contains procedures adopted by the school board. The manual lists and explains the rules and procedures for conducting business in the Salt Lake City School District and is used throughout the district. The procedures are constantly being revised and updated.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office until updated and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the district. The Superintendent maintains the record copy of the procedures manual.

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84663

4

TITLE: Salary negotiation records

DATES: i 1976-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These records document salary negotiations between the district and its employees. District employees are represented by different associations who act as negotiators with the school district representatives. Those who have negotiated for salary or benefits increases have included teachers, office personnel, building and grounds personnel, and school food service employees. The records include information on unions, benefits, statistical comparisons with previous years and other districts, correspondence, memos, charts, graphs, meeting notes and other information.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 10 years after negotiations completed and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the district. These negotiations are documented in the minutes of the school board.

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84663

TITLE: Salary negotiation records

(continued)

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Protected. UCA 63G-2-305(32)

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84672

4

TITLE: School board guidelines and indexes

DATES: i 1961; 1973-

ARRANGEMENT: Numerical by subject code

ANNUAL ACCUMULATION:

DESCRIPTION:

These are policies approved by the Salt Lake City School District Board of Education. The policies concern the methods, structure, and administration of curriculum and other aspects of education and business within the school district. The policies include such subjects as: teacher's leave of absence, maternity leave of absence, smoking on campus, discipline, and the rental of school buildings for civic and political meetings. The policies also contain a subject index.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until updated or superseded and then destroy.

APPRAISAL:

This disposition is based on the administrative needs expressed by the business coordinator. The Office of Superintendent maintains the record copy of all policies.

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84700

4

TITLE: School organization pamphlets

DATES: i 1968-1969; 1973-1977; 1979-1982.

ARRANGEMENT: Alphabetical by employee's name

TOTAL VOLUME: 0.20 cubic feet.

DESCRIPTION:

These pamphlets list all employees of the school district. They are similar to personnel directories in that they give the employee's position at the school as well as the employee's home address and telephone number. However, these are more specific in the actual organization of the school district and were probably used to help employees understand the line of authority and areas of responsibility within the school district. They were published and distributed by the Personnel Department.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Historical

This retention is based on the historical value of these records to document the organization of the district. Though they are published by the Personnel Department, no copies were found when that office was inventoried. Since Business Services no longer needs them administratively, they have been transferred to the State Archives.

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84700

TITLE: School organization pamphlets

(continued)

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private. UCA 63G-2-301(1)(e)

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84503

4

TITLE: School real property records

DATES: i 1955-

ARRANGEMENT: Alphabetical by school name

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These are reference files on all property owned by the district. They are used to reference information on individual schools and other school property. They include correspondence, memoranda, contracts and other items of information concerning school property. The series also include information on closed schools. Although several schools have closed, not all school property has been sold.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year after school property sold and then microfilm and destroy provided microfilm has passed inspection.

Microfilm master: Retain in State Archives permanently.

Microfilm duplicate: Retain in Office for 25 years and then destroy.

APPRAISAL:

Administrative Historical Legal

This retention is based on the administrative needs expressed by the district and the historical value of these records to document the ownership, development, construction, demolition, and the sale of district buildings and property.

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84503

TITLE: School real property records

(continued)

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Protected. UCA 63G-2-305(6); 63G-2-305(7)

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84665

4

TITLE: Special reports

DATES: i 1970-

ARRANGEMENT: None

ANNUAL ACCUMULATION:

DESCRIPTION:

These are special reports requested by the school board or a district department. The reports concern questions of interest and importance to the administration. The reports contain information concerning various topics such as a review of the financial data of the school district, a five-year building program, compliance with civil rights laws, program report on driver's education, a detailed study of earthquake potential in the Salt Lake area and how an earthquake would affect the schools within the district, suggestions for improving the quality of education within the school district and comparisons of Utah's educational standards and achievements with those of other states, and a detailed study of pedestrian safety around the district's elementary schools.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year or until administrative needs have been met and then transfer to State Archives with authority to weed.

APPRAISAL:

Administrative Historical

This retention is based on administrative needs expressed by the district and the historical value of these studies to document education and district activities in Salt Lake City. While numerous reports are generated in the day to day business of the school district, only the completed official reports written by those within the school district or by experts who have been directed by the district to perform and report on specific issues

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84665

TITLE: Special reports

(continued)

will be transferred to the State Archives.

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84701

4

TITLE: Tax anticipation notes and bond files

DATES: i 1957-1985.

ARRANGEMENT: Chronological

TOTAL VOLUME: 3.00 cubic feet.

DESCRIPTION:

These files document the issuance of short-term bonds in anticipation of tax monies. They include reports, correspondence, notes, financial statements and bond certificates estimates. The files also include information on bonding and bonding elections held within the Salt Lake City School District as well as tax revenue information. The tax anticipation notes are based on Utah Code Annotated (UCA) 11-14-19.5 (1990).

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Fiscal Legal

This retention is based on the administrative needs expressed by the district and the provisions of UCA 11-14-19.5 (1990) .

Records concerning bonds and bonding should be retained "until paid or cancelled".

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84704

4

TITLE: Uniform school budget reports

DATES: i 1981-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These are reports which are submitted to the State Office of Education and include information on comparative statistical data, a summary statement of revenues, expenditures, and changes in unappropriated fund balances, unrestricted grants-in-aid, minimum school programs, uniform school district budget reports broken down by expenditures, revenues, funds, and sources, as well as information concerning property tax as required by law. This report is used to create the Office of Education's annual report on funding levels and expenditures for education in Utah.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Fiscal Legal

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. A five year period is the most common federal requirement for education records.

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84704

TITLE: Uniform school budget reports

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Business Services

SERIES: 84702

4

TITLE: Unsuccessful insurance bids

DATES: i 1983-1984; 1986-1987.

ARRANGEMENT: chronological

TOTAL VOLUME: 0.50 cubic feet.

DESCRIPTION:

These bids for providing insurance plans were not accepted by the district. They are used for reference purposes by the business administrators in the selection of new insurance bids.

STATE RECORDS COMMITTEE STATUS:

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Paper: Retain in Office for 3 years or until outdated or superseded and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the district.

PRIMARY CLASSIFICATION:

Public