Retention and Classification Report

Agency: Salt Lake City School District (Utah). Whittier Elementary School (1605)
1600 South 300 East
Salt Lake City, UT 84115
801-481-4846

Records Officer Britta Barney

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AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84709 3
TITLE: Administrative subject files
DATES: 1978-1985; 1989-
ARRANGEMENT: Alphabetical by subject
DESCRIPTION:

These are subject files maintained for reference purposes. They contain information on various subjects which include: parent requests, Mountain Bell, year-round school, school carnival, career ladder, school schedules, Utah Principal's Academy, retention forms, school calendar 1989 - 1992, volunteer programs, and first day agenda.

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Paper: Retain in Office for 1 year or until updated or superseded and then destroy.

APPRAISAL:

Administrative

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

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84727 3
TITLE: Alumni oral history interviews
DATES: 1980-1982.
ARRANGEMENT: none
TOTAL VOLUME: 0.10 cubic feet.
DESCRIPTION:

These are oral interviews of Whittier Elementary alumni on twelve cassette tapes. The earliest graduate interviewed attended Whittier in 1911. These are interviews conducted by members of the Parent Teacher's Association (PTA) in the early 1980s. The interviews have not been transcribed.

RETENTION:

Retain 5 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

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

FORMAT MANAGEMENT:

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

APPRAISAL:

Historical

These interviews are valuable in documenting the history of Whittier Elementary from various perspectives.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84727
TITLE: Alumni oral history interviews

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84722 3
TITLE: Bank statements
DATES: 1984-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION: 0.10 cubic feet.
DESCRIPTION:

These are monthly statements from the First Security Bank showing the amount of money on deposit to the credit and withdrawals from the school's account. The file also contains cancelled bank checks. These are used as a back-up for justifying monthly expenditure reports. Individual schools maintain their own bank accounts.

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 3 years and then destroy.

APPRAISAL:

Administrative Fiscal

This retention is based on the School District General Records Retention Schedule (1/86) and the administrative and fiscal needs expressed by the school's principal.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84710 3
TITLE: Career ladder files
DATES: 1986-
ARRANGEMENT: Chronological.
ANNUAL ACCUMULATION: 1.00 cubic foot.
DESCRIPTION:

These files document the career ladder process at Whittier Elementary. They are used by the school principal to review the teachers' goals and accomplishments and to evaluate their teaching abilities. The school principal meets with each teacher on a regular basis to discuss their career ladder and teaching goals. These files include: the results of inventories taken on prerequisite skills, goals for the teachers and the school, various test results (including the California Achievement Test), teaching and observation results.

STATE RECORDS COMMITTEE STATUS:

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FORMAT MANAGEMENT:

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

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the school's principal.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84723 3
TITLE: Chapter I Program student records
DATES: 1984-
ARRANGEMENT: Chronological by year, thereunder alphabetical by name
ANNUAL ACCUMULATION: 0.20 cubic feet.
DESCRIPTION:

These files are the files of students who participate in the Chapter I program of the federal government. Chapter I is a federal program designed to help children who are below grade level in reading and math skills. The files include: a copy of the California Achievement Test (the test results of the whole school student body are provided), the Stanford Achievement Test, a list of students who qualify for Chapter I, ethnic background of the student, sex, birth date, and reading and arithmetic scores.

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 6 years after student leaves elementary school or until the student has moved from school district and then destroy.

APPRAISAL:

Administrative

This retention is based on 34 CFR 204.10 and the administrative needs expressed by the school's principal. Educational agencies are required "to maintain records of the amount and disposition of all Chapter I funds including records that show the share of the cost provided from non-Chapter I sources. To maintain other records that are needed to facilitate an effective audit" and to " maintain evaluation data collected under Chapter I for 5 years or until all audit findings have been resolved."

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84719 3
TITLE: Daily news bulletins
DATES: 1976-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION: 0.10 cubic feet.
DESCRIPTION:

These are daily bulletins printed by the principal's office for the faculty and staff of Whittier Elementary School. They include announcements and other items of interest to the school's employees.

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 and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the school's principal.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84718 3
TITLE: Hourly pay records
DATES: 1976-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION: 0.20 cubic feet.
DESCRIPTION:

These files include a pay record form and the original time sheet. The pay record form is used to record the hours worked by the Whittier Elementary School staff. The form is compiled from the original time sheets and is sent to the district's payroll office. The original time sheets are kept by the school as back-up. The time sheets include the following information: employee's name, hourly wage, hours worked, and job title.

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 3 years and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the school's principal.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84714 3
TITLE: Initial registration cards
DATES: 1985-
ARRANGEMENT: Alphabetical by student's name
ANNUAL ACCUMULATION: 0.20 cubic feet.
DESCRIPTION:

These are cards completed by the parents or guardians of each enrolled student. The cards are used as a record containing important information which is kept in the school office for future reference. The cards include: the student's name, student number, entry date, birth date and place, sex, school, grade, parents' names, legal address, phone number, names of other school aged children residing in the house, race or ethnic background, primary home language, and immunization records.

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 destroy.

APPRAISAL:

Administrative

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

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84725 3
TITLE: Library budget files
DATES: 1984-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION: 0.10 cubic feet.
DESCRIPTION:

These files are maintained by the school librarian in order to track the expenditures of the library budget and to account for monies spent on the different library items. The files include: purchase orders; requisitions; lists of books and other ordered items; copies of invoices; budget items for library books, periodicals, general office items, and audio-visual equipment; and Title IV materials accountable to the State Board of Education.

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 3 years and then destroy.

APPRAISAL:

Administrative

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84717 3
TITLE: Monthly absence files
DATES: 1976-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION:
DESCRIPTION:

These files are maintained to account for the number of children absent from school and is broken down per class, per day during the month. Information from this file is sent to the district's data processing officer. The district uses this information to compile reports for the State Board of Education.

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 and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the school's principal.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84715 3
TITLE: Monthly membership reports
DATES: 1976-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION:
DESCRIPTION:

These are computer reports. They are used to account for the number of students attending Whittier Elementary School. The printouts include the following information: the student's name and student number, birth date, school, grade, guardian or parent's name, 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.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84730 3
TITLE: Parent Teachers Association bank statements and receipt files
DATES: 1936-1973.
ARRANGEMENT: none
ANNUAL ACCUMULATION:
DESCRIPTION:

These files contain obsolete financial records of the Whittier Elementary School PTA. They include: bank statements, cancelled checks, and other financial information.

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 3 years and then destroy.

APPRAISAL:

Administrative Fiscal

These records are obsolete and should be destroyed.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84726 3
TITLE: Parent Teachers Association record books
DATES: 1932-1940; 1947-1948; 1954-1955.
ARRANGEMENT: Chronological.
TOTAL VOLUME: 0.10 cubic feet.
DESCRIPTION:

These are handwritten record books containing the minutes for the Parent Teachers Association (PTA) meetings. The minutes include the time and place of the meetings, names of those who were in attendence, major business conducted, and budget notations.

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 and then transfer to State Archives.

APPRAISAL:

Historical

Disposition based on the value of these records in documenting the association's achievements and function.

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84728 3
TITLE: Parent Teachers Association scrapbooks
DATES: 1942-1950; 1956-1980.
ARRANGEMENT: Chronological.
TOTAL VOLUME: 0.10 cubic feet.
DESCRIPTION:

These scrapbooks document the activities of the school children of Whittier Elementary School and its Parent Teacher Association (PTA). The scrapbooks include: photographs, news clippings, program flyers, letters, art work, announcements for various activities and events, party invitations, and various other assorted memorabilia.

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.

APPRAISAL:

Historical

Disposition based on the value of these records in documenting the association's activities, achievements, and function.

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84711 3
TITLE: Payroll files
DATES: 1976-
ARRANGEMENT: alphabetical by employee's name
ANNUAL ACCUMULATION: 0.10 cubic feet.
DESCRIPTION:

These files include completed payroll forms for all people employed at Whittier Elementary School. The forms include the employee's name and number of the employee; position; school; and hours worked during the pay period.

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 and then destroy.

APPRAISAL:

Administrative Fiscal

The record copies of all payroll records are maintained by the district's Payroll Division. The school's copy is only maintained for their convenience.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84716 3
TITLE: Purchase orders and requisition files
DATES: 1976-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION: 0.10 cubic feet.
DESCRIPTION:

These files contain purchase orders and requisitions for equipment and materials purchased by Whittier Elementary School. The orders and requisitions contain a description of the item being ordered as well as the price and actual amount paid. Some of the items ordered by the school include: textbooks, test kits, songbooks, cassette tapes, medical supplies, electrical items, tissue paper and other office supplies.

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 3 years and then destroy.

APPRAISAL:

Administrative Fiscal

This retention is based on the administrative and fiscal needs expressed by the school's principal.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84720 3
TITLE: Reimbursement information files
DATES: 1976-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION: 0.10 cubic feet.
DESCRIPTION:

This documents the expenditure of the school's petty cash fund which is used by the teachers and other school employees for items which are deemed too trivial to be used with a purchase order or requisition. Usually the amount of the purchase is under $50. Some of the items purchased with petty cash are food and drinks for the office as well as for employee parties. This file includes: check receipts, photocopies of order forms, store receipts and other information concerning purchases. The money spent by the teachers and staff of Whittier Elementary school is reimbursed by the accounting office of the school district.

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 3 years and then destroy.

APPRAISAL:

Administrative Fiscal

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

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84729 3
TITLE: School photograph albums
DATES: 1969-1972; 1974-1983.
ARRANGEMENT: Chronological.
TOTAL VOLUME: 1.00 cubic foot.
DESCRIPTION:

These are albums containing class pictures taken annually of the students and teachers at Whittier Elementary School. The pictures are of students and teachers and were taken as a souvenir for the students as well as a way of documenting the student body of Whittier.

RETENTION:

Retain 5 years.

DISPOSITION:

Transfer to the State Archives permanently.

STATE RECORDS COMMITTEE STATUS:

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

FORMAT MANAGEMENT:

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

APPRAISAL:

Historical

Disposition based on the value of these records in documenting the students that attended Whittier Elementary School.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84729
TITLE: School photograph albums

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84724 3
TITLE: Special education files
DATES: 1969-
ARRANGEMENT: Chronological, thereunder alphabetical by name of student
TOTAL VOLUME:
DESCRIPTION:

These are the individual case files for students enrolled in special education programs. The files are arranged according to the student's date of birth with 1969 being the earliest. The files may include some or all of the following information: learning disability assessment reports, approval for continued services, various completed tests and surveys, parent information, approval for placement in the Special Education Program, placement information, student information, pupil progress records, social and behavioral test results, medical information, student histories, therapy results, program information, student's performance report, parents' permission for various activities and learning programs, a Special Education Identification Card, Individualized Education Program information, and notes and correspondence concerning the student involved in Special Education.

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 and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

APPRAISAL:

Administrative

This retention is based on 34 CFR 300.563 and the administrative needs expressed by the school's principal. The Code of Federal Regulations indicates "a State and a subgrantee shall retain records for five years after completion of the activity for which

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84724
TITLE: Special education files

(continued)

they use grant or subgrant."

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84712 3
TITLE: Student records
DATES: 1983-
ARRANGEMENT: Alphanumerical by name of student and grade
ANNUAL ACCUMULATION: 0.50 cubic feet.
DESCRIPTION:

These are the individual student files for children attending Whittier Elementary School. They include: the name of the student, age, birth place and date, race, parent's names and occupations, immunization, eye tests, hearing tests, dental records, Addison-Wesley tracking card, attendance record, achievement record, progress reports, school grades, and individual analysis. These files are used for reference purposes by the school staff.

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 until student has graduated from elementary school and then send to district office.

APPRAISAL:

Administrative

This retention is based on a previously approved School Board Policy and the administrative needs of the school.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84713 3
TITLE: Textbook catalogs and order forms
DATES: 1989-
ARRANGEMENT: alphanumerical by name of teacher and grade
ANNUAL ACCUMULATION: 1.00 cubic foot.
DESCRIPTION:

The files document the ordering of textbooks. The files contain text catalogs and completed order files (which list textbooks, number ordered, and price per order).

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 3 years and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the school's principal.

AGENCY: Salt Lake City School District (Utah). Whittier Elementary School

SERIES: 84721 3
TITLE: Withdrawal files
DATES: 1988-
ARRANGEMENT: None
ANNUAL ACCUMULATION: 0.10 cubic feet.
DESCRIPTION:

These files contain completed forms requesting permission for the student to withdraw from the school. The completed forms include: name of student, the student's number, grade, new address, exit date, old address, days attended school, days absent from school, date of last attendance at school, reading level, math level, spelling level, teacher's comments, and a transfer record.

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 and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the school's principal.