# Retention and Classification Report

**Agency:** Board of Education. Office of Education. Projects Assistance Services (1810)
250 East 500 South
Salt Lake City, UT 84111
538-7820

**Records Officer**

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|---|---|---|
| 10674 | | Educational reform programs reports |
| 12416 | * | Governor's awards for excellence grant files |
| 13022 | * | Outcome-based education project grant files |
| 05876 | * | Productivity project grant files |
| 12851 | * | Publications |
| 12796 | * | Shift in Focus Program project grant files |
| 12797 | * | Strategic Planning Program project grant files |
| 12375 | * | Technology grant files |
| 12374 | * | Year-round school grant files |

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 10674 3
**TITLE:** Educational reform programs reports
**DATES:** 1988-
**ARRANGEMENT:** Chronological
**DESCRIPTION:**

These are pamphlets, leaflets, studies, proposals and similar material printed by or for the school district or any of its departments, programs or schools, and made available to the public, or the last manuscript report if not published.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 12/01/1996.

**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 State Archives permanently with authority to weed.

**APPRAISAL:**

Historical
This disposition is based on Utah School Districts General Retention Schedule, Schedule 1, Item 24.

Publications document agency history and functions. Publications have ongoing research value.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12416 3
**TITLE:** Governor's awards for excellence grant files
**DATES:** 1992-1993.
**ARRANGEMENT:** Numerical by application number
**TOTAL VOLUME:** 3.00 cubic feet.
**DESCRIPTION:**

These records document grants received by schools in recognition of overall excellence. The grant applications are reviewed by the Utah State Office of Education personnel. These files include an award application from the local school district and screening sheets completed by reviewers of the applications. The application includes identification of the school and nominating committee; demographic information about the school's students and community; a narrative discussion of demographic data which may be of interest to the reviewers; school mission statement; and statements about the following: students as full partners in learning, parental and community involvement, effective instruction and curriculum with measurable outcomes, a positive learning climate in the school, satisfaction of teachers and other staff with the school, technological application in the school, and other factors which make the school excellent and deserving of the award. The screening sheets indicate the reviewer's evaluations in each of the areas listed in the application on a low-middle-high rating system, the total score for the project, and the initials of the reviewer. Also included is the amount awarded to recipient schools and correspondence.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 07/01/1990.

**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 after end of grant period and then destroy.

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12416
**TITLE:** Governor's awards for excellence grant files

(continued)

**APPRAISAL:**
This disposition is based on Utah State General Records Retention Schedule, Schedule 2, Item 9.

**PRIMARY CLASSIFICATION:**
Public

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 13022 3
**TITLE:** Outcome-based education project grant files
**DATES:** 1985-1991.
**ARRANGEMENT:** Alphabetical by school district
**TOTAL VOLUME:**
**DESCRIPTION:**

Accepted proposals and applications, contracts, project reports, studies, certificates, agreements, memoranda, correspondence, and other records relating to receipt, review, award, evaluation, status and monitoring of grants; allocation of funds and project budgets.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 07/01/1990.

**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 transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**APPRAISAL:**

This disposition is based on Utah State General Records Retention Schedule, Schedule 2, Item 9.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 5876 3
**TITLE:** Productivity project grant files
**DATES:** 1981-1993.
**ARRANGEMENT:** Alphabetical by district, thereunder chronological
**TOTAL VOLUME:** 4.00 cubic feet.
**DESCRIPTION:**

School districts submit applications for competitive grants each year to acquire funding for productivity projects. These projects are initiated by teachers, and the files are kept as reference materials for future grant writers. After about ten years the records become obsolete. The files include grant applications, related correspondence, budget records, mid and year-end reports, and may include an evaluation.

**RETENTION:**

Retain 10 years.

**DISPOSITION:**

Destroy.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 08/01/1996.

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

**APPRAISAL:**

Administrative

The disposition is based upon the administrative needs expressed by the agency.

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 5876
**TITLE:** Productivity project grant files

(continued)

**PRIMARY CLASSIFICATION:**
Public

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12851 3
**TITLE:** Publications
**DATES:** 1989-1993.
**ARRANGEMENT:** None
**TOTAL VOLUME:**
**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)

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 07/01/1990.

**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 publication and then transfer to State Archives with authority to weed.

Paper copy: Retain in Office until administrative need ends and then destroy.

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

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

**APPRAISAL:**

Administrative Historical
This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 25.

Disposition based on value of these diverse publications to the State Department of Education and Board of Education.

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12851
**TITLE:** Publications

(continued)

**PRIMARY CLASSIFICATION:**
Public

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12796 3
**TITLE:** Shift in Focus Program project grant files
**DATES:** 1990-1991.
**ARRANGEMENT:** Alphabetical by school district
**TOTAL VOLUME:** 1.00 cubic foot.
**DESCRIPTION:**

The Utah State Legislature appropriated funds for one year to assist schools in implementation of educational restructuring in the spirit of a strategic plan called "A Shift in Focus" (November 1988), which was developed by a commission appointed by the State Board of Education. The funds were allocated non-competitively, but schools had to submit applications and comply with rules promulgated by the State Board of Education to qualify. These files include grant applications and related correspondence and reports from schools.

**RETENTION:**

Retain 3 years after program funding is terminated.

**DISPOSITION:**

Destroy provided final reports are retained permanently in Archives.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 08/01/1996.

**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 program funding is terminated and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy provided final reports are retained permanently in Archives.

**APPRAISAL:**

Administrative Historical

This disposition is based on the historical value of the final reports from the schools to researchers in understanding educational funding.

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12796
**TITLE:** Shift in Focus Program project grant files

(continued)

**PRIMARY CLASSIFICATION:**
Public

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12797 3
**TITLE:** Strategic Planning Program project grant files
**DATES:** 1991-1992.
**ARRANGEMENT:** Alphabetical by school district
**TOTAL VOLUME:**
**DESCRIPTION:**

The Utah State Legislature appropriated funds for one year to assist schools in planning activities. The funds were allocated non-competitively, but schools had to submit applications and comply with rules promulgated by the State Board of Education to qualify. These files include grant applications, related correspondence, and reports from schools.

**RETENTION:**

Retain 3 years after program funding is terminated.

**DISPOSITION:**

Destroy provided final reports are retained permanently by Archives.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 08/01/1996.

**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 program funding is terminated and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy provided final reports are retained permanently by Archives.

**APPRAISAL:**

Administrative Historical

This disposition is based on the historical value of the final reports from the schools to understand the program and projects associated with it.

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12797
**TITLE:** Strategic Planning Program project grant files

(continued)

**PRIMARY CLASSIFICATION:**
Public

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12375 3
**TITLE:** Technology grant files
**DATES:** 1987-1991.
**ARRANGEMENT:** Chronological, thereunder alphabetical by school district
**TOTAL VOLUME:** 0.70 cubic feet.
**DESCRIPTION:**

In 1987, the Utah State Legislature initiated a program which would provide funding on a competitive basis for the following sorts of programs: reducing non-teaching activities that encumber teachers; increasing learning opportunities for students; and minimizing, stabilizing, or both, the costs of the current instructional system. In addition, districts could apply for administrative technology funds to be used for developing a technology master plan, technology inservice for staff, or on-site technology assistance for classroom teachers.

The files include approved applications and associated documentation, as well as mid-year and final reports on the projects which have received state funding. The information includes correspondence regarding the committee which is to review the applications; a list of the applications received including the district, title, amount approved, and notes; a C-20 Awarded Funds Approval form which requests funding for the approved programs; a Card 4 which shows the distribution of funds among the school districts in Utah; and abstracts of the projects. Another section of the files pertain to school districts. This includes correspondence between the Utah State Office of Education and the schools or districts; copyright release forms; applications for funds, showing applicant agency identification, project director, proposed funding source, a budget; narrative summaries of project, conformity with program rules, statement of need basis of evaluation and evaluator, objectives, and costs by category.

The final report includes title of project and school district identification, how the project did or did not meet its objectives and time schedule, summary of evaluation information, potential for statewide or districtwide use of the program, narrative outline of the project to date, plans for continuation, and financial reports.

**RETENTION:**

Retain 3 years

**DISPOSITION:**
Destroy.

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12375
**TITLE:** Technology grant files

(continued)

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 07/01/1990.

**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 after grant has expired and then destroy.

**APPRAISAL:**

This disposition is based on Utah State General Records Retention Schedule, Schedule 2, Item 9.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12374 3
**TITLE:** Year-round school grant files
**DATES:** 1985-1991.
**ARRANGEMENT:** Chronological, thereunder alphabetical by school district
**TOTAL VOLUME:** 1.50 cubic feet.
**DESCRIPTION:**

In 1985, the Utah State Legislature created the Year-Round Schools grant program in response to rapidly rising enrollments and limited resources. During the program's existence (to 1991), appropriated funds were distributed to school districts on competitive applications under State Board of Education Rule R277-404. This funding was intended to help school districts develop and implement year-round schedules and alleviate the need for extensive construction expenditures on larger facilities.

These files include applications by school districts for grants, identifying the school district, an estimate of the grant funds necessary to complete the project, a statement of need, project objectives and activities, projected completion dates, and a budget which indicates amounts of funding to come from the grant and from the local school board; financial reports which indicate the amount of grant funds allocated, expended, encumbered, returned and on balance for the following categories: salaries, employee benefits, purchase of professional and technical services, inservice activities, supplies and materials, equipment, evaluation costs, travel, indirect costs restricted, and totals; correspondence between Project Assistance Services and the school or district; final reports on the use of grant funds which include identification of the school district, the district's assessment of the impact of the grant, obstacles encountered, adequacy of funds, attitude shifts, need for technical assistance to complete project, and a narrative report evaluating the success of the program; and progress reports identifying the school district with similar information to the final report.

**RETENTION:**

Retain 3 years

**DISPOSITION:**
Destroy.

**STATE RECORDS COMMITTEE STATUS:**
This retention was approved by the State Records Committee on 07/01/1990.

**AGENCY:** Board of Education. Office of Education. Projects Assistance Services

**SERIES:** 12374
**TITLE:** Year-round school grant files

(continued)

**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 after grant has expired and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**APPRAISAL:**

Administrative
This disposition is based on Utah State General Records Retention Schedule, Schedule 2, Item 9.

These grant files have temporary administrative value.

**PRIMARY CLASSIFICATION:**

Public