

Retention and Classification Report

Agency: Division of Business and Economic Development. Bureau of
Procurement Outreach (1829)
324 South State Street STE 500
Salt Lake City, UT 84111

Records Officer: Marie Magre

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AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14292

3

TITLE: Budget papers

DATES: 1985-1995.

ARRANGEMENT: Chronological

DESCRIPTION:

Records used to assist in the preparation of the division budget and to justify budget requests presented to the department director. They also contain work programs, etc.

RETENTION:

Retain 4 years.

DISPOSITION:

Destroy.

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 4 years and then destroy.

APPRAISAL:

Legal This disposition is based on Utah State General Records Retention Schedule, Schedule 2, Item 6.

This disposition is based on 32 CFR 278.42(3)(c) (1991), which says that records relating to federal grant funds be maintained for four years. The 1993 Utah General Retention Schedule, schedule 2 item 6, specifies three years for these records.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14292

TITLE: Budget papers

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14293

3

TITLE: Client case files

DATES: 1985-

ARRANGEMENT: Alphabetical by client/firm name, thereunder chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These records document businesses seeking assistance from the Procurement Outreach Program and are used to track the work that the consultants do with a specific client. Consultants counsel businesses on how the government purchases items, how to market a product, and they also conduct data base searches to let the company know who is buying widgets on that particular day. Information includes the correspondence, hand-written consultant notes, and data regarding client firm name, a contact person's name and phone number, address and size of firm, geographic distribution, and bonding capability.

RETENTION:

Retain 3 years after close of grant period.

DISPOSITION:

Destroy provided client is inactive

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1998.

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 close of grant period and then destroy provided client is inactive.

APPRAISAL:

Legal

This disposition is based on 7 CFR 3016.42 (1992), which says that these records must be kept at least three years.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14293

TITLE: Client case files

(continued)

PRIMARY CLASSIFICATION:

Protected

Provided the firm has made a business confidentiality claim, UCA 63G-2-305(1)-(2), 308 (2008).

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14245

3

TITLE: Correspondence

DATES: 1985-

ARRANGEMENT: Chronological by month

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Business-related correspondence which provide unique information about agency functions, policies, procedures, or programs. These records document material discussions and decisions made regarding all agency interests, and may originate on paper, electronic mail, or other media. This correspondence is filed separately from program case files, and project files.

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

APPRAISAL:

Administrative Legal This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 9.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14245

TITLE: Correspondence

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14264

3

TITLE: Defense Logistics Agency contract files

DATES: 1985-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.30 cubic feet.

DESCRIPTION:

This series is composed of grant requests to the Defense Logistics Agency (DLA), contracts between the Procurement Outreach Office and the DLA, quarterly reports to the DLA, and any related documents. They document the reciprocal obligations of the office and the DLA. Information includes reasons for the grant request, agreement terms, dollar-value of client firm contracts, budget information, and lists of individual contract amounts and numbers.

RETENTION:

Retain 6 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1998.

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

APPRAISAL:

Administrative Legal

This disposition is based on the administrative needs expressed by the agency. According to 7 CFR 3016.42 (1992), the records must be kept at least three years.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14264

TITLE: Defense Logistics Agency contract files

(continued)

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Protected. Business confidentiality claims, provided such are made.
UCA 63G-2-305(1)-(2), and 308 (2008).

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14291

3

TITLE: Fixed asset inventory

DATES: 1985-1995.

ARRANGEMENT: Various

ANNUAL ACCUMULATION:

DESCRIPTION:

These records are used to track and control capital outlay such as office equipment (chairs, typewriters, etc.) and other fixed assets including tools, machinery, and other large equipment.

RETENTION:

Retain 2 years.

DISPOSITION:

Destroy.

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.

Computer data files: Retain in Office for 2 years and then delete.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 27.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14291

TITLE: Fixed asset inventory

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 19962 3

TITLE: Meeting minutes and newsletters

DATES: 1985-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These records document staff meeting minutes, newsletters, and similar data that illustrate the history of the Procurement Outreach office.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 6.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 19962

TITLE: Meeting minutes and newsletters

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14262

3

TITLE: Monthly activity reports

DATES: 1985-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These monthly reports of the Procurement Outreach Office facilitate legislative and administrative oversight and provide historical documentation of agency activities. The information is derived from the Weekly activity reports, series 14261, and is edited to allow public access. Copies of this report go to the State Legislature and to the Division of Business and Economic Development Administration.

RETENTION:

Retain 2 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 07/01/1998.

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 transfer to State Archives with authority to weed.

APPRAISAL:

Historical

This disposition is based on the evidential value of this information to researchers interested in agency activities.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14262

TITLE: Monthly activity reports

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14290

3

TITLE: Parking validation disbursement record

DATES: 1991-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These forms document the disbursal of parking validations to Procurement Outreach visitors. Information includes the date of visit, visitor name, name and type of firm represented, and number of validations issued.

RETENTION:

Retain 2 years.

DISPOSITION:

Destroy.

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 2 years and then destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 16, Item 15.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14290

TITLE: Parking validation disbursement record

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14294

3

TITLE: Publications

DATES: 1991-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

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:

Retain until publication.

DISPOSITION:

Transfer to the State Archives with authority to weed.

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.

APPRAISAL:

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

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14294

TITLE: Publications

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14289

3

TITLE: Regional affiliate monthly reports

DATES: 1985-

ARRANGEMENT: Chronological, thereunder numerical by region number

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These reports are summaries of local affiliate office activity. They facilitate effective oversight of the procurement outreach program and contain information collected from the local offices, which is entered into a database. Included are the names of firms receiving contracts, contract value, total number of contracts awarded, and related information.

RETENTION:

Retain 6 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1998.

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 and then destroy.

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

APPRAISAL:

Administrative

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

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14289

TITLE: Regional affiliate monthly reports

(continued)

PRIMARY CLASSIFICATION:

Protected

Provided all firms have made a business confidentiality claim, UCA 63G-2-305(1)-(2), 308 (2008).

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14265

3

TITLE: Regional affiliate office files

DATES: 1985-

ARRANGEMENT: Alphabetical by region name, thereunder chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These contracts (between the Procurement Office and the local affiliates), activity reports, correspondence, and related documentation are maintained to provide administrative oversight of the affiliated procurement offices, operated by nine councils of government. The information includes summaries of activities by the local office, policy statements from the main office, and other related information.

RETENTION:

Retain 3 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 07/01/1998.

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 and then transfer to State Archives with authority to weed.

APPRAISAL:

Historical

This disposition is based on the evidential value of these records to researchers.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14265

TITLE: Regional affiliate office files

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 19961

3

TITLE: Scrapbooks

DATES: 1985-

ARRANGEMENT: Chronological, thereunder alphabetical by subject

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These scrapbooks and news clippings document the history of the Procurement Office, which exists to assist small companies in selling their products to the federal government, particularly the Dept. of Defense.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 4.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 19961

TITLE: Scrapbooks

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14263

3

TITLE: Travel reimbursement files

DATES: 1985-

ARRANGEMENT: Alphabetical by employee surname

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These records document payments made to state employees and agencies for the purpose of reimbursing travel, transportation, equipment, service, training, and other reimbursable costs. Records include correspondence, forms, travel reservations, travel authorizations, per diem vouchers, transportation requests, hotel reservations, invoices, itemized expenses, and other supporting records used to validate reimbursable expenses.

RETENTION:

Retain 1 year.

DISPOSITION:

Destroy.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 44.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14263

TITLE: Travel reimbursement files

(continued)

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private.

Home address and phone number, social security number, and employee credit card numbers. UCA 63G-2-302(1)(e) and 302(2)(d) (2008).

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 14261

3

TITLE: Weekly activity reports

DATES: 1985-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These weekly reports of the employees provide source information for the Monthly activity reports, series 14262, and provide a means of reporting employee activity to supervisors. The information includes an activity summary of employees, including identification of newly registered clients, problems with existing contracts, employee projects, and number of consultations during the week.

RETENTION:

Retain 4 years after creation of related monthly report.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1998.

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 4 years after creation of related monthly report and then destroy.

APPRAISAL:

Administrative Legal

This disposition is based on 7 CFR 3016.42 (1992), which states to retain the records three years. The division needs these records for an additional year for administrative purposes.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 19960

3

TITLE: Workshop records

DATES: 1991-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.40 cubic feet.

DESCRIPTION:

These records document the annual Utah Supplier Development Conference, sponsored by the Procurement Outreach office. This large event, in which 300-400 small companies in Utah participate, assists businesses in working with the federal government. All related government agencies and large commercial entities are invited to come and help the small business get acquainted with each other, their buyers, and to sell their products. Products needed by the federal government change frequently, so the conference serves as a way to keep small business informed of current demand. Information includes informal minutes from meetings following the conference, handouts, a directory, mailers, correspondence sent, budget records, publicity items, speaker information, brochures, news articles, and other data gathered to organize the conference. These data are summarized in the Monthly activity reports, series 14262, and retained permanently there.

RETENTION:

Retain 5 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1998.

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.

AGENCY: Governor's Office of Economic Development. Procurement Assistance

SERIES: 19960

TITLE: Workshop records

(continued)

APPRAISAL:

Administrative

PRIMARY CLASSIFICATION:

Public