

Retention and Classification Report

Agency: Board of Education. Office of Education. Curriculum Section
(1940)
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Records Officer: Benjamin Rasmussen

12403	Administrative reference files
12400	Budget printouts
12672	Career Ladder Program administration records
12673	Career Ladder Program history records
12397	Curriculum expenditures journal
12502	*Distance accelerated learning project files
12499	Experimental and developmental education grant files
12501	Experimental and developmental education unapproved appl
13168	Media catalog/depository system data
12377	National Diffusion Network (NDN) grant disbursement record
10622	National Diffusion Network (NDN) grants to Utah
12849	*Promoting Excellence and Efficiency in Public Schools Progr
27821	Public Education Job Enhancement Program files
12402	Purchase authorizations
12396	Receipts
12401	Travel expenditures files
17576	Utah topic educational media

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12403

3

TITLE: Administrative reference files

DATES: 1983-

ARRANGEMENT: None

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These files include miscellaneous documents, such as maps, notes, and other reference materials which are maintained for the purpose of allowing access to these documents to Curriculum staff.

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 or until administrative need ends, whichever is first and then destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 3.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12400

3

TITLE: Budget printouts

DATES: 1983-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

The Division of Finance prepares reports on a monthly basis for each state agency. The reports for Curriculum are sent both to Internal Accounting and directly to Curriculum. These reports show the expenditures of Curriculum on a line-item basis and include the Summary by division, series 83738, Summary by revenue, series 83737, and Summary by vendor, series 84008, reports which are also maintained by Internal Accounting.

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 21.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12672

3

TITLE: Career Ladder Program administration records

DATES: 1984-

ARRANGEMENT: Alphabetical by district, thereunder chronological

ANNUAL ACCUMULATION: 3.00 cubic feet.

DESCRIPTION:

Established by the Utah State Legislature, the Career Ladder Program provides funds to districts, allocated by the number of students in the district, through which teachers can receive additional compensation for various kinds of professional development activities and additional professional assignments. These records comprise the plans created by the districts (with supporting documentation), according to which districts suballocate funds for acceptable uses, and correspondence. The records created in administering the Career Ladder Program include lists of Career Ladder Review Committee (CLRC) membership; correspondence; accounting forms, both for expenditures of the CLRC and disbursement of funds to districts; consent calendars submitted to the State Board of Education for its approval; approval letters sent to districts; and abstracts of approved district plans. Also included are the records created in planning and conducting the annual Career Ladder conference for school districts, such as correspondence, conference programs and other conference materials, and accounting forms. In the case of certain districts, which received single or multiyear waivers or participated in the block grant pilot program, the only records for certain years may be correspondence, and the only documentation of plans will be records from a previous year.

RETENTION:

Retain 2 years after funding year.

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

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

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12672

TITLE: Career Ladder Program administration records

(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 2 years after funding year and then transfer to State Archives with authority to weed.

Paper copy: Retain in Office for 3 years after funding year and then destroy.

APPRAISAL:

Historical

This disposition is based on the evidential value these records hold for documenting the history of teacher development in Utah.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12673

3

TITLE: Career Ladder Program history records

DATES: 1984-

ARRANGEMENT: Numerical by volume number, thereunder chronological

ANNUAL ACCUMULATION: 0.30 cubic feet.

DESCRIPTION:

This series was created to preserve and summarize important records related to the history of the Career Ladder Program in Utah, due to the data's high reference rate in the Utah Office of Education (USOE). The information is contained in eight volumes: (1) text of legislation and regulation, (2) detailed breakdown of allocation of funds to districts, (3) miscellany of "other documents," (4) articles from state and local newspapers and newsletters, (5) official annual and other administrative or evaluation reports prepared by USOE staff, (6) research and evaluation reports prepared by university staff or other external organizations on contract, (7) technical reference publications on the evaluation of teachers, and (8) published articles from national journals. In the case of volumes 4 and 8, records have not been added to since 1989.

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 records for year are prepared 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: Board of Education. Office of Education. Curriculum Section

SERIES: 12673

TITLE: Career Ladder Program history records

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12397

3

TITLE: Curriculum expenditures journal

DATES: 1983-

ARRANGEMENT: Alphabetical by specialist surname

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

This journal documents travel, conference expenses, and purchases for curriculum specialists. Some of the expenditures are paid through federal grants. The record shows the specialists's name, vendor receiving payment, purchase order number, object code, and amount of the expenditure.

RETENTION:

Retain 6 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 6 years and then destroy.

APPRAISAL:

Fiscal Legal

This disposition is based on 34 CFR 76.730, 76.731, and 76.734, which require that records of state-administered Department of Education projects be retained for five years "after completion of activity for which [the state] uses grant or subgrant funds."

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12397

TITLE: Curriculum expenditures journal

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12502

3

TITLE: Distance accelerated learning project files

DATES: 1984-1988.

ARRANGEMENT: Chronological

TOTAL VOLUME: 2.50 cubic feet.

DESCRIPTION:

These records document the Distance Accelerated Learning Project (DALP), a program begun in 1984 by the Media Productions unit in Curriculum to develop a series of videotapes to be used in teaching Spanish. The project was funded through state and federal monies. Included are records of expenditure, contracts for services, correspondence, various literature, videotapes, and evaluations of the usefulness of the project. All but the videotapes and evaluations will be purged after five years.

RETENTION:

Retain 5 years or until files are purged.

DISPOSITION:

Transfer to the State Archives with authority to weed.

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 or until files purged and then transfer to State Archives with authority to weed.

Video recordings master: Retain in Office until superseded or administrative need ends and then transfer to State Archives with authority to weed.

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12502

TITLE: Distance accelerated learning project files

(continued)

APPRAISAL:

Historical Legal

This disposition is based on 34 CFR 76.730, 76.731, and 76.734 which require that records of state-administered Department of Education projects be retained for five years "after completion of activity for which [the state] uses grant or subgrant funds." Also, the project evaluations and videotapes hold permanent informational value for educators.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12499

3

TITLE: Experimental and developmental education grant files

DATES: 1993-

ARRANGEMENT: Chronological by fiscal year, thereunder alphabetical by school district name

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These records document funds applied for and received by school districts to be used toward experimental education projects. They include applications, correspondence, and mid-year and final reports. The information includes the district name, title, amount approved, distribution of funds among the school districts in Utah, abstracts of the projects, project director, proposed funding source, budget, narrative summaries of the project, conformity with program rules, statement of need, basis of evaluation and evaluator, objectives, and costs by category. The final reports include how the project did or did not meet its objectives and time schedule, summary of evaluation information, potential for statewide or district-wide use of the program, narrative outline of project to date, plans for continuation, and financial reports. In 1991, the State Legislature merged several previously existing grant programs into the Experimental and Developmental Education Program. This program replaced the following: Outcome Based Education, Productivity, Technology, and Promoting Excellence and Efficiency in the Public Schools. This program was administered by Project Assistance Services until 1993 when it was transferred to Curriculum.

RETENTION:

Retain 3 years

DISPOSITION:

Transfer to the State Archives permanently provided documents other than final reports are destroyed.

STATE RECORDS COMMITTEE STATUS:

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

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12499

TITLE: Experimental and developmental education 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 3 years and then transfer to State Archives provided documents other than final reports are destroyed.

APPRAISAL:

Fiscal Historical

This disposition is based on the audit requirements of the financial records and the historical value of the program reports.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12501

3

TITLE: Experimental and developmental education unapproved applications

DATES: 1991-

ARRANGEMENT: Numerical by assigned project number

ANNUAL ACCUMULATION: 4.00 cubic feet.

DESCRIPTION:

These records document grants applied for but not received by school districts. The information includes 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.

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 rejection or withdrawal and then destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 2, Item 12.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 13168

3

TITLE: Media catalog/depository system data

DATES: 1980-

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This information is used to track audiovisual tapes and equipment which are checked out of the Utah State Office of Education. Information includes the name of who checked out the material, when due, how much they owe for the use, description of the media, the format it is in, and date published.

RETENTION:

Retain 1 year.

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.

Computer data files: Retain in Office for 1 year and then delete.

APPRAISAL:

Administrative

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

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 13168

TITLE: Media catalog/depository system data

(continued)

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private. UCA 63G-2-302(c) (2008)

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12377

3

TITLE: National Diffusion Network (NDN) grant disbursement records

DATES: 1978-

ARRANGEMENT: Alphabetical by program name and school district

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

Monthly reports on grants received by State agencies from the Federal Government and may contain applications, notice of award, program reports, 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 and then destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 2, Item 3.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 10622

3

TITLE: National Diffusion Network (NDN) grants to Utah

DATES: 1978-

ARRANGEMENT: Chronological by year of grant request

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

The U. S. Dept. of Education (USDE) is responsible for the National Diffusion Network (NDN), a program to provide funds to allow the implementation of proven educational techniques by local school districts and schools. The NDN actually consists of numerous specific programs for educational improvement. Money originally flows in the form of a block grant from the USDE to the Utah State Office of Education (USOE). Then, individual school districts apply to USOE for funds to use them in particular schools for specified projects.

This series includes applications for federal assistance, a budget for the federally appropriated funds, and correspondence between USOE and USDE. A major grant request, including an extensive report on the proposed use of the funds and the needs which exist in Utah, is filed every five years. In the intervening years, a smaller formal request for funds is filed. The major and annual requests for funds are included in this record series. These records are maintained in a three-ring binder while held in the office. This series was the responsibility of Project Assistance Services until 1993, when Curriculum assumed responsibility for NDN.

DOCUMENT TYPE(S):

Applications, budget, correspondence, reports

FUNCTION(S):

Provide funds to implement proven educational techniques in schools, thereby improving education.

SUBJECT(S):

National Diffusion Network programs, grant request information, and proposed use of funds.

SERIES HISTORY:

Utah State Office of Education (USOE) asks for block grants from U.S. Dept. of Education, then schools receive funds from USOE. Annual requests are filed by USOE for funds, but a major grant request is also filed every five years. This series was generated by Project Assistance Services until 1993, when Curriculum assumed the responsibility.

STATE RECORDS COMMITTEE STATUS:

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 10622

TITLE: National Diffusion Network (NDN) grants to Utah

(continued)

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:

Historical This disposition is based on Utah State General Records Retention Schedule, Schedule 2, Item 4.

The records in this series have historic value.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12849 3

TITLE: Promoting Excellence and Efficiency in Public Schools Program grant files

DATES: 1987-1991.

ARRANGEMENT: Alphabetical by school district, thereunder chronological

TOTAL VOLUME: 4.00 cubic feet.

DESCRIPTION:

These records are applications for competitive grants submitted by school districts annually to acquire funding for evaluation, planning, and other projects which support the goals of the State Board of Education. Information includes grant applications, related correspondence, budget records, and mid and year-end reports, and may also include formal project evaluation reports.

RETENTION:

Retain 10 years after program is terminated.

DISPOSITION:

Transfer to the State Archives with authority to weed.

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 is terminated and then transfer to State Records Center. Retain in State Records Center for 10 years and then transfer to State Archives with authority to weed.

APPRAISAL:

Administrative Historical

This disposition is based on the historical value that year-end reports have to researchers.

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12849

TITLE: Promoting Excellence and Efficiency in Public Schools Program grant files

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 27821

1

TITLE: Public Education Job Enhancement Program files

DATES: 2002-

ARRANGEMENT:

TOTAL VOLUME:

DESCRIPTION:

These case files document participants in the Public Education Job Enhancement Program (described in the Utah Administrative Code R690-100-5). Records include award applications, transcripts, and reimbursements given to participants.

RETENTION:

Retain 10 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention has not been approved by the State Records Committee.

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 Fiscal

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 27821

TITLE: Public Education Job Enhancement Program files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12402

1

TITLE: Purchase authorizations

DATES: 1983-

ARRANGEMENT: Grouped by merchandise and service categories, thereunder alphabetical by vendor name and numerical by approval number

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These records are the authorizations for purchases of merchandise and services by Curriculum. The items are paid for by federal grant monies. Included are state purchase orders, purchase authorizations, and supporting documentation for the requests. These records will contain the name of the vendor or contractor, the items or services ordered, and cost of these goods.

STATE RECORDS COMMITTEE STATUS:

This retention has not been approved by the State Records Committee.

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.

APPRAISAL:

Fiscal Legal

This disposition is based on 34 CFR 76.730, 76.731, and 76.734, which require that the records of state-administered Dept. of Education projects be retained for five years "after completion of activity for which [the state] uses grant or subgrant funds."

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12396

3

TITLE: Receipts

DATES: 1983-

ARRANGEMENT: Alphabetical by program name, thereunder reverse chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These are receipts for money received by Curriculum from schools and teachers. School districts are assessed for rights to use the Instructional Television Network. Also, receipts are issued when a teacher or other individual purchases art booklets sold by Curriculum. The receipts show the name of the program credited with the receipt, person from whom the money was received, date, and amount.

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 and then destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 13.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12401

3

TITLE: Travel expenditures files

DATES: 1983-

ARRANGEMENT: Alphabetical by specialist surname

ANNUAL ACCUMULATION: 0.40 cubic feet.

DESCRIPTION:

These records document the travel activities and expenditures of Curriculum personnel. Funding for the trips comes from federal grant monies. The records include a Request for Approval of Trip form (DF-5), which shows the planned itinerary and the costs of the trip. Supporting documentation, such as conference agenda are attached. Upon return from the trip, a C-6 Reimbursement form, showing the name, mileage, and per diem expenses for the trip is completed.

RETENTION:

Retain 6 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 6 years and then destroy.

APPRAISAL:

Fiscal Legal

This disposition is based on 34 CFR 76.730, 76.731, and 76.734, which require that records of state-administered Dept. of Education projects be retained for five years "after completion of activity for which [the state] uses grant or subgrant funds."

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 12401

TITLE: Travel expenditures files

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 17576

3

TITLE: Utah topic educational media

DATES: ca. 1980-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

These educational films and slides produced by the Utah State Office of Education and are shown in classrooms throughout the state. Topics include reenactments of historical Utah events, such as pioneer life.

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.

Motion picture film master: Retain in Office for 5 years and then transfer to State Archives with authority to weed.

APPRAISAL:

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

This disposition is based on the informational value these films hold.

AGENCY: Board of Education. Office of Education. Curriculum Section

SERIES: 17576

TITLE: Utah topic educational media

(continued)

PRIMARY CLASSIFICATION:

Public