

Retention and Classification Report

Agency: Legislature. Office of the Legislative Fiscal Analyst (572)

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Records Officer: Steven Allred

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AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3205

3

TITLE: Administrative records

DATES: 1968-

ARRANGEMENT: Alphanumerical

DESCRIPTION:

Appropriations reports include: 1967-69, 1969-70, 1970-71, 1971-72, 1972-73; 1973-74, 1974-1975; 1975-1976; 1976-1977; 1977-78, 1978-1979; 1980-1981; 1980-1981; 1981-1982; 1982-83, 1989-90).

Other reports include: Interim Progress Report (1 July 1968); Government of Higher Education in Utah (January 1969); Annual Salary Survey (August 1970); Executive Compensation Commission (December 1969); Recommended Compensation Practices for Elected and Appointed Officials (August 1970); Recommendations of the Legislative Analyst for Administrative Improvement (January 1967 and January 1969); An Analysis of Utah Departmental Reorganization and Consolidation (October 1968); Legislative Control Through Fiscal Oversight (4 May 1966); Findings and Recommendations of the Legislative Auditor, 1959-1960 (December 1960); First Biennial Report to the Joint Budget-Audit Committee and the 38th Utah State Legislature (January 1968); A Program for Legislative Fiscal Review (circa 1966); Legislative Computer Application (August 1968); and State Revenue Projections for the Biennial Fiscal Period July 1, 1969, to June 30, 1971 (January 1969). There's a binder from 1978-1979 dealing with the topic of tax relief (1979 HB 303 and reports leading up to it. Fiche includes various other compensation reports, USU analyst, etc.

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 State Archives permanently with authority to weed.

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

Microfiche duplicate: Retain in State Archives permanently with

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3205

TITLE: Administrative records

(continued)

authority to weed.

APPRAISAL:

Administrative Historical

These records are created by the agency administration to document the history of: research, programs, policies, procedures, leadership, and decision making processes of the agency.

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 25392

3

TITLE: Analyst working papers

DATES: 1995-

ARRANGEMENT: Alphabetical by Sub-committee name.

DESCRIPTION:

These records contain unique information in rough notes or drafts assembled or created and used to prepare or analyze other documents. The information adds proper understanding to the formulation and execution of policies, decisions, actions, or responsibilities.

RETENTION:

Retain 10 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1992.

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 Records Center. Retain in State Records Center for 8 years and then destroy.

APPRAISAL:

Administrative Fiscal This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 33.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 25392

TITLE: Analyst working papers

(continued)

PRIMARY CLASSIFICATION:

Protected UCA 63G-2-305 Secs. 21 and 30

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3210

3

TITLE: Appropriations reports

DATES: 1967-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION: 0.20 cubic feet.

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 State Archives permanently with authority to weed.

Microfiche master: For records beginning in 1969 through 1970. Retain in State Archives permanently with authority to weed.

Microfiche duplicate: For records beginning in 1969 through 1970. Retain in State Archives permanently with authority to weed.

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

APPRAISAL:

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

Disposition based on the value of these reports in documenting agency procedures and function.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3210

TITLE: Appropriations reports

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3700

3

TITLE: Appropriations requests

DATES: 1963-

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

Copies of budget estimates and justification prepared or consolidated in formally organized budget offices. Included are appropriation language sheets, narrative statements, workload/expansion plans and related schedules and data.

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 destroy.

APPRAISAL:

Administrative Fiscal This disposition is based on Utah State General Records Retention Schedule, Schedule 2, Item 7.

This disposition is based on the State Archivist's review and general schedule determination 4/5/1999.

PRIMARY CLASSIFICATION:

Public UCA 63G-2-301 (1)(b) (2008)

SECONDARY CLASSIFICATION(S):

Private. UCA 63G-2-302 (1)(e) (2008)

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 11924

3

TITLE: Audit records

DATES: 1964-1975.

ARRANGEMENT: Chronological by date of report.

ANNUAL ACCUMULATION:

DESCRIPTION:

Reports prepared by auditors as a result of a Department of Highways financial audit.

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 07/01/1990.

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 transfer to State Archives.

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

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

APPRAISAL:

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

Disposition based on the value of these records in documenting agency achievements, policies, procedures, and function.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 11924

TITLE: Audit records

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3164

3

TITLE: Budget analysis records

DATES: 1971-

ARRANGEMENT: Alphanumerical.

ANNUAL ACCUMULATION:

DESCRIPTION:

Correspondence or subject files of formally organized budget offices documenting agency policy and procedures governing budget administration, and reflecting policy decisions affecting expenditures for agency programs.

RETENTION:

Retain 15 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 10 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives with authority to weed.

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

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

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3164

TITLE: Budget analysis records

(continued)

APPRAISAL:

Historical This disposition is based on Utah State General Records Retention Schedule, Schedule 2, Item 8.

This disposition is based on the historical and research value of these records to document the actions and function of the Legislature.

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22958

3

TITLE: Committee audio recordings

DATES: 1992-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

This series consists of audio tape recordings of the Appropriation Committee and Executive Committee. Access to these recordings is often requested for research purposes. The written meeting minutes are retained as part of Series 22952.

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 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.

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

APPRAISAL:

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

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22958

TITLE: Committee audio recordings

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22954

3

TITLE: Fiscal notes

DATES: 1974-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

This series contains the fiscal notes prepared by the Office for proposed legislation. Information includes what impact the legislation will have on the State's budget, agency budgets, local governments or on the general public.

RETENTION:

Retain Permanent.

DISPOSITION:

Retain in agency custody.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 02/01/2003.

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 permanently.

APPRAISAL:

Administrative Fiscal Historical

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22957

3

TITLE: Interim studies

DATES: 1973-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

Provides documentation of reports to the Executive Committee during interim sessions. The studies are conducted on any appropriation issue which may be an issue during the upcoming legislative session.

RETENTION:

Retain 15 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 02/01/2003.

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

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

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

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22957

TITLE: Interim studies

(continued)

APPRAISAL:

Administrative Fiscal Historical

Value is based on the analysis provided on appropriation issues as reported in these interim studies by the Legislative Fiscal Analyst.

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22952

3

TITLE: Minutes

DATES: 1965-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

Provides documentation of the appropriation committee meetings and executive committee meetings. Information includes minutes, agendas and related records.

RETENTION:

Retain 10 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

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 10 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives with authority to weed.

APPRAISAL:

Historical

These records have evidentiary value and serve as a history of board and committee actions. They contain minutes of open committee and board meetings as required by UCA 52-4-7. (2005) Records may also include agenda, recordings, recordings and minutes of closed portions of meetings, and other supporting documentation.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22952

TITLE: Minutes

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22953

3

TITLE: Personnel records

DATES: 1997-

ARRANGEMENT: Alphabetical

ANNUAL ACCUMULATION:

DESCRIPTION:

Complete work history of an individual employed by the Legislative Fiscal Analyst Office. May include application for employment or resume, verification of employment eligibility, performance plans, performance evaluations, position description, employee awards, letters of commendation, termination forms, etc. Retirement and pension records are retained permanently by the Office.

RETENTION:

Retain 65 years after separation or retirement.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1992.

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 separation or retirement and then transfer to State Records Center. Retain in State Records Center for 65 years and then destroy.

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 11, Item 2.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22953

TITLE: Personnel records

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 23977

3

TITLE: Public Education Data Book

DATES: 1993-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION:

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 State Archives permanently with authority to weed.

APPRAISAL:

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

Disposition based on the value of these records in documenting agency achievements, policies, programs, and function.

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 23292

3

TITLE: Publications

DATES: 1967-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION:

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 State Archives permanently with authority to weed.

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

Microfiche duplicate: Retain in State Archives permanently 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 historical and research value of these publications to document the function of the Office of the Legislative Fiscal Analyst.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 23292

TITLE: Publications

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3187

3

TITLE: State agency budget hearing records

DATES: 1957-

ARRANGEMENT: Alphabetical by subcommittee.

ANNUAL ACCUMULATION:

DESCRIPTION:

Records of hearings conducted as part of the regulatory process and hearings on proposed rules and changes; they may be maintained with related information including meeting notices, proofs of publications, meeting minutes, and the conclusions reached. UCA 52-4-200 (2009) requires that written minutes be kept of all open meetings. May include audio and video recordings.

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 State Archives permanently with authority to weed.

APPRAISAL:

Historical This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 2.

This disposition is based on the historical and research value of these records to document the actions and function of the Legislature.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 3187

TITLE: State agency budget hearing records

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22956

3

TITLE: Subcommittee reports

DATES: ca. 1970-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

Provides a record of reports made by various subcommittees assigned to research issues for the Appropriations Committee. Information includes the findings of the subcommittee, background information, proposals, committee actions, etc.

RETENTION:

Retain 10 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

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 transfer to State Archives with authority to weed.

APPRAISAL:

Historical

This retention and disposition is based on the retention schedule approved by the Utah Legislature.

AGENCY: Legislature. Office of the Legislative Fiscal Analyst

SERIES: 22956

TITLE: Subcommittee reports

(continued)

PRIMARY CLASSIFICATION:

Public