

Administrative Records

Record Title	Description	Retention	Classification	Comments	Schedule #
Administrative or Advisory Committee Minutes	These are records of administrative or advisory committees, boards, or other public bodies as "created by statute, rule, ordinance or resolution" as defined by UCA 52-4-2(3)(a) (2006). They document the actions and decisions. These records usually include agenda, internal memoranda, notes, written minutes and a recording (audio or video) of the open portion of the meeting. Minutes of the closed portion of the meeting may be kept as a recording or detailed written minutes.	1 year or until administrative need ends	Primary: Public Secondary: Protected UCA 63-2-304(32) (2006)	Records of the closed portion of the meeting are Protected. [Approved by GRAMPA 5/18/2006]	AD-012
Agendas	These are copies of notices of regular and special meetings of county boards and committees. They may include date, time, and location of meeting, and list items to be discussed by committee members at regular, special, and emergency public meetings.	2 years or until administrative need ends and then destroy. (Maintain permanently if kept with official minutes)	Public.		AD-001
Annual Reports	These are reports on program activities and accomplishments of the county or individual department for the previous year. They may include statistics, narrative reports, graphs, and diagrams.	Permanent. Transfer 1 copy to County Archives.	Public	If published only on a website, print a paper copy prior to transfer.	AD-002
Clipping Files	These files include newspaper or other published articles regarding actions of the agency or topics of interest to them.	Permanent. May be transferred to County Archives.	Public	Electronically published articles should be printed to paper prior to transfer.	AD-003
Constitution and by Laws	These are the constitution and bylaws of county governing/advisory boards (e.g., library board, hospital board, fair board). They establish the organization and operational procedures for the board. They usually include date of adoption and amendments, description and purpose of board, membership, description and responsibilities of board's positions, meeting frequency, voting procedures, explanation of what constitutes a quorum, and the establishment of procedural rules (e.g., Robert's Rules of Order, etc).	Permanent. May be transferred to the County Archives after disbanding of committee.	Public		AD-004
County Histories	These are published or unpublished histories written by or financed from county funds on the county government or an individual county agency. They may include title, author, date written, and a historical narrative.	Permanent. May be transferred to the County Archives.	Public		AD-005
Employee Survey Data	The data obtained from employee surveys are used to provide feedback to management on a variety of employee-related issues. The raw quantitative data is used for comparative purposes from year to year. The raw qualitative data, (such as comments or unrequested responses), is used to create a summary document which identifies main themes or concerns.	Maintain raw quantitative data for 5 years. Maintain raw qualitative data for 5 business days to compile summary document then destroy. Maintain summary document for 5 years.	Primary: Public: Secondary : Protected UCA 63G-2-305(25) and UCA 63G-2-301 (3)(0) (when survey comments identify a current employee discipline issue)	This series is maintained in both electronic and paper form. Approved by GRAMPA 8/27/2009	AD-031
Executive Administration & Correspondence	These are records that document how the office is organized and how it functions, its pattern of action, its policies, procedures, organizational charts, and achievements.	Permanent. May be transferred to the County Archives.	Primary Classification Public Secondary Classification Private	Home address, telephone number, and social security number are Private data.	AD-006
Executive or Legislative Minutes	These are the minutes of executive or legislative public bodies as "created by statute, rule, ordinance or resolution" as defined by UCA 52-4-2(3)(a) (2006). They include an agenda, supporting documentation, written minutes and a recording (audio or video) of the open portion of the meeting. Minutes of the closed portion of the meeting may be kept as a recording or detailed written minutes.	Permanent. May be transferred to the County Archives.	Primary: Public Secondary: Protected UCA 63-2-304(32)	Minutes or recordings of an open meeting that is required to be retained permanently shall be maintained in or converted to a format that meets long-term storage requirements. UCA 52-4-203(4) (2006) Records of the closed portion of	AD-015

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Feasibility Studies	These are studies conducted before the installation of any significant technology or equipment. They include specific studies and system analyses for the initial establishment and major changes of these systems.	Permanent. May be transferred to the County Archives.	Primary Classification: Public. Secondary Classification Protected: UCA 63-2-304 (21) and UCA 63-2-304 (10) (1995)		AD-007
General Administrative Records	These are records of a general facilitative nature created or received in the course of administering programs. May include daily, weekly, or monthly activity reports which are summarized in an annual report, correspondence, fax cover sheets, supporting documentation, and memoranda.	2 years or until no longer needed for reference and then destroy.	Public		AD-008
Government Records Access and Management Act (GRAMA) Access Requests	These request forms document individuals seeking access to county records as provided under UCA 63-2-204. They include requester's name, address, telephone number; date; record requested; date request received; whether access provided or denied; and date responded.	1 year and then destroy.	Public		AD-009
Grant Application Files (Unsuccessful)	These files document the rejection or withdrawal of grant applications. They include memoranda, correspondence, and other records relating to the decision to reject the grant proposal.	3 years after rejection or withdrawal and then destroy.	Public		AD-010
Grant Award Files	These files document grants awarded to a county agency. They include memoranda, correspondence, budgets, and other records relating to the project proposal.	3 years after grant ends OR according to the terms of the grant.	Public		AD-011
Mailing Lists	These are lists of names and addresses used for various county mailings (billings and other administrative purposes).	Retain until superseded and then destroy.	Primary Classification: Public Secondary Private: UCA 63-2-302 (2)(d) (1995)		AD-013
Meeting minute recordings	These are the recordings of the proceedings of regularly scheduled, special and emergency county board and committee meetings that must comply with the Utah Open Meetings Act. They are used to create the official minutes.	4 years or until pending litigation is resolved or unless other statutes apply.	Primary: Public: UCA 63G-2-301(1)(e) (2008). Secondary : Protected UCA 63G-2-305(32) (2008); UCA 52-4-203 (2008)	Approved by GRAMPA 3/26/2009	AD-030
Notary Bond Files	These files document county employees providing service to county agencies as notaries public. They include valid certificates, copies of bonds, and any related correspondence.	1 year after expiration or renewal of bond and then destroy.	Public		AD-016
Performance Audits	These are reports written and prepared as a result of a performance audit on a county entity. These studies are frequently contracted with private consultants. They contain summary documentation on agencies programs, operations and productivity.	Permanent. May be transferred to the County Archives.	Public		AD-017
Policy and Procedure Manuals	These are records documenting the formulation and adoption of policies and procedures for the function of the office or department. Includes narrative or statistical reports and related correspondence on program activities; mission statement studies regarding department or offices operations, circular letters or directives and records related to significant events in which department or office participated.	Permanent. Transfer 1 copy to County Archives.	Primary Classification: Public Secondary: Protected: UCA 63-2-304 (10) and UCA 63-2-304 (11) (1995)	Vital Record	AD-018

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Policy and Procedure Working Files	These files contain records related to policy and procedure issuance, which document their formulation. Includes issuances related to routine administrative functions (e.g., payroll, procurement, and personnel).	2 years after being superseded and then destroy.	Public		AD-019
Press Release Files	These files contain a copy of each prepared statement or announcement issued for distribution to the news media. A press release may be a textual record or a non-textual record such as a film or video sound recording.	Permanent. May be transferred to the County Archives.	Public		AD-020
Public Relations Files	These files contain speeches, addresses, and official comments or remarks made at formal county ceremonies by elected county officials. The format may be paper, videotape, motion picture film, etc.	Permanent. May be transferred to the County Archives.	Public.		AD-021
Publications	These are pamphlets, leaflets, studies, proposals and similar material printed by or for the county or any of its departments, subdivisions or programs, and made available to the public, or the last manuscript report if not published.	Permanent. Transfer 1 copy to County Archives.	Public	If published only on a website, print a paper copy prior to transfer.	AD-022
Records Transfer Forms	These are the listings of county agency records transferred to the County Records Center. The information may include records series number, agency name and address, records officer's name and signature, chief administrative officer's name, record series title and inclusive dates, classification information, accession number, agency box number, description of box contents, and records center box location.	Agency copy: 1 year after records are destroyed or until administrative need ends.	Public	Originals maintained Permanently by Records Management & Archives.	AD-023
Scrap Books	These are a chronological record of the activities of the county or individual county department. Include photos, newspaper clippings, flyers, program notes, brochures, and other items pertaining to county activities and actions and reactions of county citizens.	Permanent. May be transferred to the County Archives.	Public		AD-024
Survey Files	These records are survey tools administered by agencies to gather data for improvements or changes. They document customer service, client needs, performance improvement, or other agency functions. They may contain survey questions and results, comments, ratings, responses to essay-type questions and other information. They may also contain respondent name, agency contact information or other personal identifiers.	Until superseded or obsolete	Primary: Public Secondary: Private UCA 63G-2-302 (2)(d)	Approved by GRAMPA 3/15/2007. All personal identifiers must be redacted prior to release of survey data.	MO-008
System Studies and Report Files	These are documents related to various studies (i.e. program analyses, project studies) by private and other government agencies. Includes working papers, correspondence, related documents and final report.	Permanent. May be transferred to the County Archives.	Public		AD-025
Technical Reference Files	These files contain copies of documents retained strictly for reference and informational purposes that are not part of the official files. Include copies of reports, studies, special compilations of data, drawings, periodicals, books, clippings, brochures, catalogs, and vendor price lists.	Retain until annual review and destroy material no longer needed for reference.	Public		AD-026
Telephone Messages	These are the actual incoming telephone messages received by a county office. They normally include date, time, names of person receiving and leaving message, and action request (e.g., return call, etc).	1 week or until administrative need ends and then destroy.	Public		AD-027
Working Files	These are background records, such as studies, analyses, notes, drafts, memos, preliminary and interim reports.	5 years after completion and destroy.	Public		AD-028

