

Records Management Committee Meeting

Monday, July 20, 2026

1:00 p.m. to 2:00 p.m.

Meeting Minutes

Board members present:

David Fleming (Acting Chair)
Kendra Yates (State Archivist designee)
Daniel Schoenfeld
Steve Garside
Tangee Sloan
Ruth Todd

Others present:

Paul Tonks (DARS and RMC legal counsel)
Maren Peterson (DARS)
Alyssa Stringham (DARS)
Deanna Herring (Executive Director, Tax Commission)
Jason Gardner (Deputy Executive Director, Tax Commission)
Mike Lee (Deputy Executive Director, Tax Commission)
Amy Arnn (Tax Commission)
Jessica Priskos (Tax Commission)
Arnold Qin (Tax Commission)
Marisa Mathie (DEQ)
Atie Amirgol (DEQ)
Sara Romero Rivera (DEQ)
Lindsay Hansen (UDOT)
Robert Pelly (UDOT)
Jonathan Herrick (Commerce)
Brian Hansen (Commerce)
Madison Galt (Commerce)

David Fleming called the meeting to order at 1:01.

Business

- Approval of [June 2026 meeting minutes](#)

Daniel motioned to approve, Steve seconded. Unanimously approved. (Ruth Todd was absent for this vote.)

Recommendation Request

- [Utah State Tax Commission request for recommendation](#)

Alyssa Stringham introduced the topic. The tax commission wants to change the retention for all the records contained in their vendor-controlled systems. Currently, they don't have a way to purge data. Since they don't have the technology or the money to create the technology to purge this data quickly, they want to make the retention period 30 years. An estimated 140 record series retention schedules would be affected by this. She showed examples of schedules with varying dispositions that would be changed, which have a mix of paper and electronic records.

David Fleming asked if the paper records have different data than the systems. Jason Gardner answered that the paper records predate the system.

David Fleming asked for clarification. Jason Gardner clarified that they would eventually like to be able to apply various retention periods to series in their database. Currently, they don't have that capability. So they want to apply a blanket retention schedule of 30 years until they reach that goal.

David Fleming asked what the reason is for 30 years. Jason Gardner answered that they are at about 20 years since their databases were put into place, so it gives them 10 years to find a better solution. David Fleming made a point that ten years is very long, and the legislature is not going to approve funding to update their system if they are seen as in compliance. David Fleming asked if there was any exception so that they can stay out of compliance but not be in trouble so they can get the funding they need to upgrade the system. Kendra Yates answered that they have never done a retention schedule exception, but it may make sense to implement it for this situation. David Fleming asked if they had an exception, how would they figure out how to get their retention sorted. Jason Gardner answered they would have to create bigger buckets for the retention to make it simpler.

Jason Gardner explained that they have been trying to figure out a solution to delete data for five years, and that they haven't come to an adequate conclusion. About 30 other states use the same vendors, and none of them delete data.

Kendra Yates pointed out that since the systems have been in place for about 20 years, they have been out of compliance for at least ten years. She wondered what the problem is that is being solved by creating a big bucket of 30 years to prevent things from being overkept. Jason

Gardner replied that they want to make sure they are in compliance and be transparent to the public about their situation.

David Fleming asked if they were comfortable with the idea of requesting a technology exception, to document that the system's inability to delete data was causing the agency to be out of compliance, and to detail their remediation plan. Jason Gardner replied that it sounded like a great solution. Kendra Yates stated the next step is for DARS to work with DTS to modify the current technology exception process to provide an option for retention/disposition issues.

Ruth Todd joined the meeting at this time.

Retention Schedule Review and Approval

[Lead and copper records \(SSRS 31522\)](#)—New

Submitted by Alyssa Stringham on behalf of DEQ, Division of Drinking Water

Alyssa Stringham presented the schedule and showed that the retention is dictated by federal code. David Fleming asked what a superseded record was and how that trigger was defined. Sarah Rivera answered that it was when a new decision or determination was made.

Kendra Yates motioned to approve; Tangee Sloan seconded the motion. Unanimously approved.

[Statewide transportation improvement program \(STIP\) annual submittal and approval records \(SSRS 31513\)](#)—New

Submitted by Alyssa Stringham on behalf of UDOT, Financial Programming Division

Alyssa Stringham explained the schedule and the retention. David Fleming asked about the designation. Alyssa Stringham showed that it was primarily public and secondarily private.

Steve Garside motioned to approve; Ruth Tood seconded the motion. Unanimously approved.

[Foundation, soil, and aggregate testing summary records with geospatial coordinates \(SSRS 31518\)](#)—New

Submitted by Alyssa Stringham on behalf of UDOT, Materials and Pavements Division

Alyssa Stringham explained that these records have permanent administrative value to the agency. Kendra Yates clarified that there was another retention schedule for the records that didn't have the geospatial coordinates. Lindsay Hansen confirmed. David Fleming asked if there were any records that could fall into both series; Lindsay Hansen said no.

Kendra Yates motioned to approve; Steve Garside seconded the motion. Unanimously approved.

[Internal policies and procedures \(SSRS 31244\)](#)—New

Submitted by Alyssa Stringham on behalf of Department of Commerce

Alyssa Stringham gave a brief overview. Brian Hansen explained they have 30 policies and want to keep them for 10 years, so they can keep them longer than the standard 4 years. They made a second designation as protected because they have some policies on quality assurance. Kendra Yates clarified that the quality assurance were audits to ensure they were complying with the policies.

David Fleming moved to approve; Steve Garside seconded. Unanimously approved.

[Telecommunications and water long-term research resource records \(SSRS 31524\)](#)—New

Submitted by Alyssa Stringham on behalf of Commerce, Division of Public Utilities

Alyssa Stringham gave a brief overview.

Tangee Sloan motioned to approve; Ruth Todd seconded. Unanimously approved.

[Telecommunications and water permanent research records \(SSRS 29713\)](#)—New

Submitted by Alyssa Stringham on behalf of Commerce, Division of Public Utilities

Alyssa Stringham gave a brief overview. David Fleming asked if they were electronic records, and Madison Galt responded yes.

Ruth Todd motioned to approve; Tangee Sloan seconded. Unanimously approved.

Other Business

Next meeting scheduled for August 24.

Everyone present confirmed their attendance.

Meeting adjourned at 1:55.