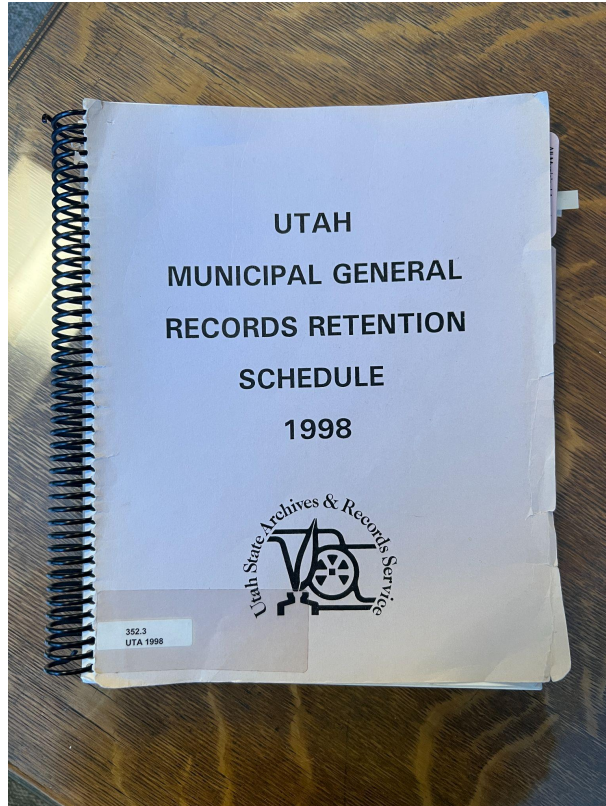
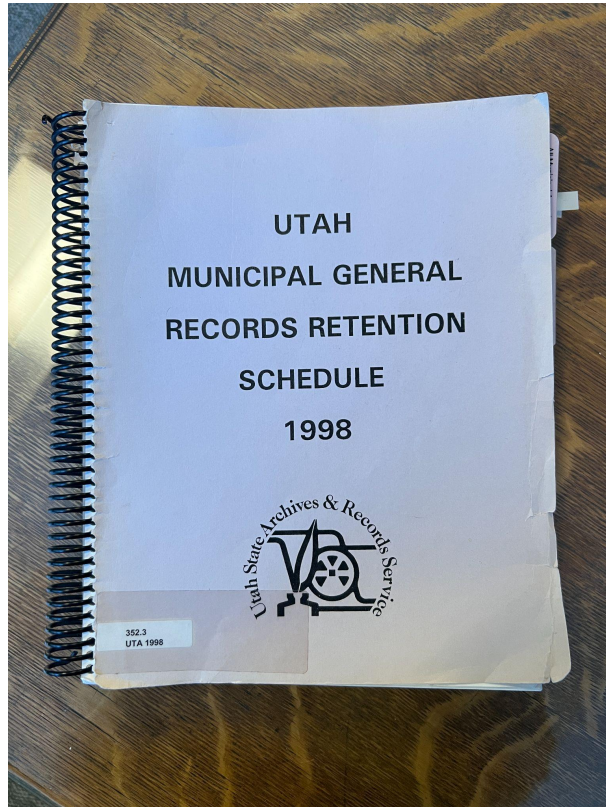


# General Records Retention Schedules



The **General Retention Schedule (GRS)** exists as a tool to facilitate government efficiency and transparency through good records management practices, by providing consistent and reliable records use appraisals that clearly identify records of enduring value, which the Utah Division of Archives has a vested interest to preserve, and by providing justifiable time-limits for records destruction based on industry best practices and in compliance with state statute.

# General Records Retention Schedules



**A General Records Schedule of Utah is issued by the Utah Division of Archives and Records Service according to its mandate in Utah Code.** The GRS provides disposition authorization for groups of records common to several or all agencies of the state government and its political subdivisions. Which generally includes records relating to personnel management, fiscal accounting, procurement, communication, contractual documentation, asset management and other common administrative functions that are widely applicable to more than one government agency.



# General Records Retention Schedules

UTAH  
MUNICIPAL GENERAL  
RECORDS RETENTION  
SCHEDULE  
1998



352.3  
UTA 1998

**Schedule 20**  
**Planning and Zoning Records**

Utah Municipal General Records Retention Schedule 1998

164

SCHEDULE 20  
PLANNING AND ZONING RECORDS

**BOARD OF ADJUSTMENT MINUTES AND EXEMPS** (Item 20-3)  
These minutes document all meetings of the Board of Adjustment. The board consists of "five members and whatever alternate members that the chief executive officer considers appropriate" (UCA 10-9-701(2)(a) (1997)). The duties of the Board of Adjustment are to hear and decide on "appeals from zoning decisions applying the zoning ordinance; special exceptions to the terms of the zoning ordinance; and variances from the terms of the zoning ordinance" (UCA 10-9-701(1) (1997)). The minutes are used to document requests, discussions, and decisions of the Board.

**RETENTION**  
Permanent. May be transferred to the State Archives.

**PRIMARY CLASSIFICATION**  
Public.

(Approved 06/97)

**CONDITIONAL USE PERMIT RECORDS AND EXEMPS** (Item 20-2)  
These files document the application for conditional use permits. These permits allow for the construction of buildings on the condition that impacts on neighborhoods are mitigated. They include the original application, blueprint drawings, investigative reports, planning commission decisions, cash receipts, and related correspondence.

**RETENTION**  
Permanent.

**PRIMARY CLASSIFICATION**  
Public.

(Approved 12/97)

Utah Municipal General Records Retention Schedule 1998

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Searching | : No

# General Retention Schedule Items

Find:

Search

Clear

Show advanced search options

Sort: by Relevance

View: Detail View

2023 results

Prev 1 2 3 4 5 6 7 8 9 10 ... 81 Next

Export results to spreadsheet

## Project management records (GRS-21)

These files contain memoranda, preliminary reports, and other records documenting assignments and the progress of projects. These files do not contain the final reports.

[View](#) | [PDF](#)

Retain for 1 year after end of project or program, and then destroy records.

Effective 1991-06-01

## Personal property tax refund records (GRS-214)

These are forms used for refunds made for double or erroneous payments of personal property tax. The forms include value, rate and tax dollars in error. In some counties, the assessor does not issue refunds, but only recommends a refund to the county auditor. Such recommendations usually contain name, address, taxing district, year and make of vehicle, value and tax amount paid, reason for refund and amount refunded.

[View](#) | [PDF](#)

Retain for 3 years, and then destroy records.

Effective 1991-06-01

## Status

Discontinued (1497)

Current (526)

## Category

administrative (215)

human resources (182)

financial management (129)

health (101)

payroll (101)

[More...](#)

## Commission agenda files (GRS-252)

[View](#) | [PDF](#)





# Current Categories

63 categories - a mix of functional and sector specific

administrative (215)

human resources (182)

financial management (129)

health (101)

payroll (101)

law enforcement (83)

school district (79)

education (71)

public works (69)

clerk (67)

purchasing (64)

public affairs (8)

county (7)

state government (2)

fire department (49)

library (46)

facility management (45)

high school (45)

general accounting (40)

budget (39)

public utilities (38)

maintenance (34)

planning and zoning (33)

parks and recreation (31)

bonds and bonding (30)

special assessment (7)

special education (4)

cartographic (1)

junior high/middle school (28)

aging and adult services (26)

recorder (26)

redevelopment (24)

risk management (23)

animal control (21)

auditor (19)

building inspection (19)

assessor (18)

security services (18)

sheriff (18)

meeting minutes (6)

governor (1)

school board (4)

attorney (17)

geospatial data sets (17)

police department (17)

communication (16)

data processing (15)

colleges and universities (14)

fixed asset (14)

motor vehicle (14)

legal (13)

student (13)

elected office (4)

surveyor (13)

airport (12)

mosquito abatement (12)

solid waste (12)

cemetery (11)

elementary school (11)

food service (10)

municipality (10)

treasurer (10)

business services (8)

intrinsically historical (8)

# GRS Project Objectives

- 1. Create categorical classifications that make the General Retention Schedules most applicable to Local Governments easier to identify and use.**
2. Streamline and logically restructure groups of GRS related to particular local government functions to better meet agencies' recordkeeping needs.
3. Reduce the redundancy of General Retention Schedules to improve search results and reduce confusion about schedule applicability.
4. Improve GRS descriptions to provide adequate specificity and clarify
5. Work with auditor team/advisory group to create PII protection, and records disposition training resources

# Categorical Assessment and Analysis

Reviewed General Records Retention Schedules (GRS) from **Colorado, Indiana, Nevada, Wisconsin, and Washington**

Retention schedules review was based on **regional similarities** to Utah, comparable **population/government size** and **technical systems**. We also review retention schedules from state's that have a **reputation for being a professional leader** on the topic of archives and records management.

Analyzing each for **categorical methodology, formatting** and **usability**

# Categorical Assessment and Analysis

A categorical review of a sample of locally approved retention schedules of Utah local government's was also conducted, including:

## **Millcreek, Orem, Salt Lake County and Davis County**

A functional review of Salt Lake City's divisions, and the divisions of Utah's county offices and special service districts was also conducted.



# Categorical Challenges and Opportunities

Recognizing the administrative roles and responsibilities all governments share. Every entity manages **people, money, things** and **information**

Honoring distinctive **legal mandates, roles** and **responsibilities**

Choosing a categorical naming scheme that is reflective of function, that is **meaningful** and **identifiable**, but not agency specific

Understanding agency specific identifiers may not be universally applicable in **Utah's diverse local government landscape**, in which functions can transcend county, city and special districts, based on regional population, incorporation status and tax base.



## Local Gov Categories

Yellow = Colorado, Green = Indiana, Blue = Nevada, Pink = Wisconsin, Orange = Washington, Clear = Utah Local Gov Approved Retentions (Davis County/Millcreek City), and SLC Government Departments

# Categorical Findings

Financial Management  
Personnel Management  
Asset Management  
Information Technology/Systems  
General Administration/Agency  
Management  
Governing/Legislative Body  
Executive Office  
Building Regulation  
Licenses/Permits  
Land Use/Planning/Zoning  
Community/Economic Development

Public Health  
Public Safety  
Corrections  
Litigation/Legal Counsel  
Elections  
Revenue/Tax Collection  
Parks/Recreation/Public Land  
Conservation/Water Management  
City/County Infrastructure  
Community/Public Relations  
Airports  
Library/Museums/Archives