

FINANCIAL MANAGEMENT FOR GEORGIA LOCAL UNITS OF ADMINISTRATION

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INTRODUCTION

The computer provides enormous amounts of detailed information to enable Local Unit of Administration (LUA) personnel to do their jobs better and faster. Computerized records have also created new kinds of record media that must be integrated into filing and security systems. Georgia Code 50-18-99 requires “all records created or received in the performance of a public duty or paid for by public funds by a governing body are deemed to be public property and shall constitute a record of public acts”.

GEORGIA LAW

The Georgia General Assembly, recognizing the importance of the adoption of sound records management principles by state and local governments, in 1972 passed the Georgia Records Act (O.C.G.A. §50-18-90 through 50-18-135).

STATE RECORDS MANAGEMENT PROGRAM

O.C.G.A. §50-18-99 through 50-18-121 requires that local governments, including LUAs, shall establish by resolution or ordinance a records management plan which includes:

1. The name of the person or title of the officer who will coordinate and perform the responsibilities of the governing body;
2. Each retention schedule approved by the governing body; and
3. Provisions for maintenance and security of the records.

Although the responsibility for coordinating the records management program rests with the Department of Archives and History, each LUA must adopt an effective records management program to preserve records vital to Georgia's public education program. The Secretary of State through the Department of Archives provides a listing of commonly held records and suggested minimum retention schedules. The Georgia Archives publishes *Retention Schedules for Local Government Paper and Electronic Records (Retention Schedules)* located at [http://sos.georgia.gov/archives/pdf/state spec reports/Local Government Schedules Nov 07.pdf](http://sos.georgia.gov/archives/pdf/state_spec_reports/Local_Government_Schedules_Nov_07.pdf). If documents exist that are not covered by the schedule published by Archives, the local governing body must adopt a retention schedule for those documents. The local government may request the documents be added to the schedule maintained by Archives according to procedures included in the above document.

Retention schedules have been approved for a large assortment of records. Special records, including those related to education are also included. For specific records and associated retention requirements, refer to the Retention Schedules document.

The GA DOE has adopted the position that state and federally funded state-administered programs retain records for five (5) years after final disposition of non-expendable personnel property to be consistent with CFR, Title 34, Part 76.734, which governs most education programs. LUAs should observe the 5-year retention period for state and federally funded programs where applicable. Electronically duplicated records are acceptable as original records.

VITAL RECORDS

The Secretary of State, Archives Division, has created a publication, Archives Advice No. 12, Identifying and Protecting Vital Records, to help local governments identify and protect those records vital to operations and protection of the rights of citizens. Go to the following link -

[http://sos.georgia.gov/archives/pdf/records and information management services/Archives Advice12.pdfAs](http://sos.georgia.gov/archives/pdf/records_and_information_management_services/ArchivesAdvice12.pdfAs)

STORING VITAL RECORDS

Archives Advice #12 suggests that vital records be duplicated and stored in another (off-site) location from the original record. Duplication can be accomplished through either microfilming or electronic storage. Originals may be stored in a fire-proof vault and environmentally controlled space. The Department of Archives will store both electronic and microfilm electronic copies free of charge.

Other Resources

The Archives website includes much more useful information relating to Records Management including guidance regarding electronic records, and microfilm. See [Publications](#) for more information.

Summary

Records management is a critical responsibility of LUAs. The Georgia Archives provides a number of resources to help districts manage these resources.