

LOCAL GOVERNMENT RECORDS COMMITTEE

Tuesday, January 17, 2023

10:30 A.M.

William F. Winter Archives & History Building

Jackson, Mississippi

AGENDA

- I. Call to Order
- II. Public Comment
- III. Minutes
Adoption of Minutes from July 19, 2022
- IV. Report of Local Government Records Office
- V. Consideration of Proposed Retention Schedules
All Local Governments
Personnel
 - GSL 05-01a
 - GSL 05-01b
 - GSL 05-06
 - GSL 05-10 thru 05-14
- VI. Consideration of Pre-1920s Records Disposal Requests
Lauderdale County
- VII. Adjournment

MISSISSIPPI DEPARTMENT OF ARCHIVES AND HISTORY

**MINUTES OF A MEETING OF THE
LOCAL GOVERNMENT RECORDS COMMITTEE**

Tuesday, July 19, 2022

The Local Government Records Committee held its regular quarterly meeting at 10:30 a.m. on Tuesday, July 19, 2022, in the 3rd Floor Board Room of the William F. Winter Archives and History Building, Jackson, Mississippi. David Pilcher, director, Archives & Records Services (A&RS) Division, Mississippi Department of Archives and History (MDAH), presided. Tim Barnard, director, Local Government Records (LGR) Office, A&RS, presented the agenda for the meeting. Rebecca Mee, LGR Specialist, A&RS, recorded the minutes of the meeting.

The following members of the Committee were present:

Anne Webster, At-large member appointed by the Governor.

The following members of the Committee attended by teleconference:

James Brumfield, Mississippi Sheriffs' Association;
Phil Burchfield, Association of School Superintendents;
Norman A. Cannady, Assessors/Collectors Association;
Felecia Caples, Mississippi Historical Society;
Jennifer Head, Office of the Secretary of State;
Emiko Hemleben, Office of the State Auditor; and
Avery Lee, Office of the Attorney General.

The following members of the Committee were absent:

Cathy Clark, Municipal Clerks and Collectors' Association;
Lisa Chism, Department of Revenue;
Erin Feathers, Mississippi Genealogical Society;
Arnell Harried, Mississippi Circuit Clerks' Association;
Tim Kellar, Mississippi Chancery Clerks Association;
Landis Mickens, Mississippi Association of Supervisors;
Angela Richburg, Mississippi Municipal League and
Ahmad Smith, Mississippi Bar Association.

The following MDAH staff members were present:

Bob Dent, director, Government Records, A&RS; and
Lauren Harmon, LGR Specialist, A&RS.

- I. Mr. Pilcher recognized a quorum and called the meeting to order.
- II. Mr. Pilcher acknowledged an opportunity for public comment. There was no public comment.
- III. Minutes of the January 18, 2022, meeting were presented to the Committee. Ms. Webster moved, Mr. Brumfield seconded, and the Committee unanimously approved the minutes.
- IV. Mr. Barnard reported on the recent activities of the LGR Office. “A Day at Your Disposal” visits are increasing, with ten since the last meeting, along with over thirty courtesy visits to counties, municipalities, and a school district. One visit was to return a court docket from the 1800s to Claiborne County, which had recently been donated to MDAH from an estate.
 An online presentation to municipal clerks and a mass mailing have increased interest in the program, with at least seven municipalities voting to begin collecting the \$1 fee. Two more counties joined as of January 1, with interest shown by two of the remaining four counties. The annual Emergency Preparedness for Records workshop was done via three one-hour Zoom sessions this year, with fifty-three participants representing cities, counties, school districts, libraries, and community colleges. Mr. Barnard also gave hybrid in-person/online presentations at conferences of justice court clerks and school board administrative assistants.
 Last January the MDAH Board of Trustees approved Local Government Records Grants totaling \$50,000 to six counties, covering one-time costs for shelving, book repairs, and vendor-digitization projects. So far two counties have finished their projects and have been reimbursed, with a third county’s verification in progress. This yearly grant program is currently available only to participating counties; applications for the next round are being accepted through October 3.

V. Mr. Barnard presented the following schedules:

A. All Local Governments

Administrative Records

- GSL 01-16 Video/Audio Recordings, Non-evidentiary
 Description: Non-evidentiary recordings created by cameras used for surveillance purposes in public buildings and vehicles.
 Retention: Thirty (30) days.
- GSL 01-17 Video/Audio Recordings, Evidentiary
 Description: Evidentiary recordings created by cameras used for surveillance purposes in public buildings and vehicles.
 Retention: One (1) year after final disposition of case.

Mr. Barnard explained these schedules already exist for Law Enforcement and School Districts, and that proposed retention period for these general All Local Governments

schedules mirrored that retention. Ms. Webster moved, Mr. Brumfield seconded, and the Committee unanimously approved the retention schedules.

Health Insurance

GSL 06-10 Employer-Provided Health Insurance Forms
Description: Internal Revenue Service Forms 1094-C, 1095-C, and other forms required by the Affordable Care Act regarding health coverage for employees of a local government entity.
Retention: Four (4) years after close of calendar year.

Mr. Barnard explained that the IRS requires employers to keep these forms for three years after creation, which is done in the year following the affected calendar year. Ms. Webster moved, Ms. Lee seconded, and the Committee unanimously approved the retention schedules.

B. Counties

Building Permit

GSC 10-03 Permit Files, Construction
Description: Files documenting building permit application, inspections, and issuance of certificate of occupancy.
Retention: ~~Ten (10)~~ Twenty (20) years after completion of project.

This schedule was held for consideration with its companion municipal schedule later in the meeting.

Chancery Clerk

GSC 01-60 Notice of Lis Pendens Filings
Description: Documents filed to notify others of pending litigation involving specific property. (These are the original documents, not the Lis Pendens Record that references them, GSC 01-61).
Retention: Thirty-Two (32) years.

GSC 01-61 Lis Pendens Record
Description: Docket of Lis Pendens filed to notify others of pending litigation involving specific property. May take form of index with summary of each notice filed or may contain copies of actual notices.
Retention: Permanent.

Mr. Barnard explained that when these records are filed, the filer has one year to file the referenced lawsuit, then anyone with interest in the property has ten years to file against adverse possession, while any minors involved have an additional twenty-one years to

file. This results in a thirty-two year retention, confirmed by consultation with several chancery clerks.

C. Municipalities

Building Code & Permits

GSM 10-03 Permit Files, Construction

Description: Files documenting building permit application, inspections, and issuance of certificate of occupancy.

Retention: ~~Permanent Ten~~ (10) Twenty (20) years after completion of project.

Mr. Barnard explained that this and the companion county schedule GSC 10-03 (above) had been presented at the January meeting, where the Committee had voted to amend the original proposed retention of ten (10) years to twenty (20) years. The schedules were held over for additional public comment per committee rules. Ms. Webster moved, Ms. Head seconded, and the Committee unanimously approved the retention schedules as amended.

VII. Consideration of Pre-1920s Records Disposal Request

Columbus Municipal School District Records

The Columbus Municipal School District requested permission to dispose of various Student Cumulative Folders from Union Academy (an African-American school) dated prior to 1920 as part of a larger disposal project. LGR Staff determined that there may be historical value in this set of records and contacted Archivist Mona Vance-Ali at the Columbus-Lowndes Public Library, who agreed to accept the transfer of these records into the library's custody, to which the school district also agreed. The Committee approved the disposal authorization with the stipulations that the district keep the Student Permanent Records [GSS 02-01], that the records donated to the library be donated to MDAH if the library no longer wishes to keep them, and that any indexes or digitally scanned images that are created be sent to MDAH for preservation.

VIII. Other Business

The date for the next Local Government Records Committee meeting is Tuesday, October 18, 2022 at 10:30 A.M.

VIII. Adjournment

There being no further business, Mr. Pilcher adjourned the meeting.

Katie Blount, Chair

PROPOSED RECORDS RETENTION SCHEDULE

All Local Governments

Personnel Records

SERIES	TITLE	DESCRIPTION	RETENTION
<u>Amended Schedules</u> (deletions in red, struck through ; new text <u>underlined</u>)			
GSL 05-01a	Personnel File, Official Record	The master personnel record maintained for each employee. May include job application, personnel transaction record reflecting position classification and salary level, payroll withholding information, leave summary record, performance documentation, and other documents related to the individual's employment. See <u>Schedule GSL 05-01b for any records needed to calculate post-employment benefits.</u> <i>Replaces Schedules CJC 05-01, GSC 05-02, GSM 05-02, GSS 05-02, and LIB 04-04.</i>	Fifty-five years after earliest date of hire; OR <u>Seven (7) years after termination of employment.</u> <small>Originally Approved: 4/10/2018</small>
GSL 05-01b	<u>Retirement Documentation</u>	<u>All records needed for the retirement of an employee, including requests for retirement, insurance authorizations, correspondence, election of options forms, calculations of benefits, etc.</u>	Fifty-five (55) years after earliest date of hire, OR Seven (7) years after termination <u>of employment</u> , whichever is later.
GSL 05-06	Job Applications, Not Hired <u>Applicant Records</u>	Applications submitted for employment from individuals not hired for the position. <u>Records documenting the selection process and justification for non-hire, including job applications, pre-employment assessments, denial letter, etc.</u>	Two (2) years <u>after final decision on position applied for.</u> <u>Copies used by supervisors and selection committee: One (1) year after final decision.</u> <small>Originally Approved: 7/18/2017</small>

These retention schedules are being presented January 17, 2023, to the Local Government Records Committee for adoption. Use of these schedules for records disposition may not be undertaken until approval by the committee. Public comments are welcomed. Approved retention guidelines are available at "www.mdah.ms.gov/new." Public comments may be sent to "Local Government Records Office, P. O. Box 571, Jackson, MS 39205" or by email to "logov@mdah.ms.gov"

PROPOSED RECORDS RETENTION SCHEDULE

All Local Governments

Personnel Records

SERIES	TITLE	DESCRIPTION	RETENTION
<u>New Schedules</u>			
GSL 05-10	Pre-Employment Documents	Documents related to the hiring process, including job descriptions, recruitment notices, job advertisements, etc.	Until superseded.
GSL 05-11	Pre-Employment Assessments, Hired	Civil Service Exams, analysis forms, resumes, and other related documents used in determining whether an applicant is hired.	Three (3) years.
GSL 05-12	Employee Licenses / Certifications	Any licenses / certification issued to an employee by professional, education, or other agencies and organizations. Typically, they are occupation-specific and are often requirements for employment.	Until superseded.
GSL 05-13	Training Records – Individual	This series documents all training completed by individuals employed by the local government, whether educational or professional development. <i>Replaces Schedules GSC 15-18, GSC 08-19, GSM 17-18, and GSM 08-08.</i>	Three (3) years after termination of employment.

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PROPOSED RECORDS RETENTION SCHEDULE
All Local Governments
Personnel Records

SERIES	TITLE	DESCRIPTION	RETENTION
GSL 05-14	Training Records – General	<p>This series documents training activity provided to local government personnel. Information in this series includes description of training activities, sign-in sheet, and general information regarding the training provided. See GSL 05-13 Training Records – Individual, for records regarding individuals attending training.</p> <p><i>Replaces Schedules GSC 15-19, GSC 08-20, GSM 17-19, and GSM 08-09.</i></p>	<p>Course Materials and Forms: Until superseded.</p> <p>Training Day Records: 5 Years.</p>

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Local Government Records Office
 PO Box 571, Jackson, MS 39205-0571
 (601) 576-6894 • Fax (601) 576-6899
 locgov@mdah.ms.gov

RECORDS DISPOSAL AUTHORIZATION

Complete the top half, sign, and return to the Local Government Records Office

The Lauderdale County Archives in Lauderdale County, Meridian, MS
(name of office) (name of city or county)

requests authorization to dispose of the following records:

Name of Series	Date Range Requested	Volume
<u>County Cash Books</u>	<u>1900-1920</u>	<u> </u>
<u>County Cash Receipts & Disbursements</u>	<u>1900-1920</u>	<u> </u>

This request is (check one):

- Routine disposition
 Emergency disposition (explain): _____

Leslie M. Joyner October 7, 2022
Signed Date
Leslie M. Joyner Archives Director
Name Title
PO BOX 5511 Meridian MS 39302
Mailing Address City State Zip Code
601-482-9752 archives@lauderdalecounty.org
Phone Email address

(This section to be completed by LGR Office)

MS Code authority § _____ - _____ - _____ Minimum retention _____

Previous LGRO authorization: _____
Number Date Date range previously approved

Additional remarks: _____

Authorization # LGRO _____

In accordance with Mississippi Code of 1972, Annotated, §25-59-21, authorization is granted to dispose of the records series listed above.

Katie Blount, Director _____
 Mississippi Department of Archives & History Date

RECORDS DISPOSAL AUTHORIZATION

Complete the top half, sign, and return to the Local Government Records Office

The Archives & History in Lauderdale County
(name of office) (name of city or county)

requests authorization to dispose of the following records:

Name of Series	Date Range Requested	Volume
Tax Receipts	1900-1920	

This request is (check one):

- Routine disposition
 Emergency disposition (e Verified by pdfFiller)

Leslie M. Joyner October 21, 2022
Signed Date
Leslie M. Joyner Archives Director
Name Title
PO BOX 5511 Meridian MS 39302
Mailing Address City State Zip Code
601-482-9752 archives@lauderdalecounty.org
Phone Email address

(This section to be completed by LGR Office)

MS Code authority § _____ - _____ - _____ Minimum retention _____

Previous LGRO authorization: _____
Number Date Date range previously approved

Additional remarks: _____

Authorization # LGRO _____

In accordance with *Mississippi Code of 1972, Annotated*, §25-59-21, authorization is granted to dispose of the records series listed above.

 Katie Blount, Director _____
Date
 Mississippi Department of Archives & History