

Records Retention Schedule

2024

- Permanent retention records should be stored in the CMA electronic repository (Google Drive or other system as approved by the Executive Committee) and/or the Georgia Historical Society (GHS) deposit collection (paper records) as indicated.
- The Secretary is responsible for maintenance of the electronic repository, periodic deposits to the GHS collection, maintenance of electronic copies of the GHS inventory, and maintenance of this records retention schedule, including providing it to all Executive Committee members annually to ensure their compliance.
- All Executive Committee members are responsible for providing their electronic and paper records to the Secretary for appropriate filing.
- The electronic repository should be set up with a filing system that identifies when records expire to ensure timely disposition of expired records. Annually, the Secretary will purge the electronic repository of expired records.

Record Title	Notes/Description	Retention Period	Format	Responsible Party
Corporation Records	(Organization and Reorganization records, Constitution, By Laws, State Registration, Tax Exemption/Status records)	Permanent	Electronic Copy And Paper Copy (GHS Deposit)	President
Job and Committee Descriptions		Permanent (retain copy of all superseded versions)	Electronic Copy And Paper Copy (GHS Deposit)	President
Annual Report	Annual summary of all activities, including: Executive Committee members, membership list, programs and speakers, Kiah Fund grant recipients, Annual Awards recipients, RA participants, Committee members and summaries of activity, etc.	Permanent	Electronic Copy And Paper Copy (GHS Deposit)	President
Reciprocal Admission Program Guidelines		Permanent (retain copy of all superseded versions)	Electronic Copy And Paper Copy (GHS Deposit)	President
RA Card Final Designs		Permanent	Electronic Copy	President
Kiah Fund Guidelines		Permanent (retain copy of all superseded versions)	Electronic Copy And Paper Copy (GHS Deposit)	President
Monthly Membership Updates	Summary of monthly activities, notifications of upcoming events and deadlines	5 years	Electronic Copy	President
Awards Committee Report		5 years	Electronic Copy	President

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Awards Applications		5 years	Electronic Copy	President
Nominating Committee Report		5 years	Electronic Copy	President
Meeting Invitations, Registration Lists, Meeting Sign-in Sheets	Membership notifications/reminders of upcoming meetings; meeting attendance records (registrations, sign-in sheets)	5 years	Electronic or Paper Copy (as created/received)	Vice President (Secretary)
Thank You Notes	For speakers, programs, site hosts	5 years	Electronic or Paper Copy (as created/received)	Vice President
Annual Financial Report		Permanent	Electronic Copy And Paper Copy (GHS Deposit)	Treasurer
Annual Audit Report		Permanent	Electronic Copy And Paper Copy (GHS Deposit)	Treasurer
Monthly Financial Reports		5 years	Electronic Copy	Treasurer
Monthly Bank Statements		5 years	Electronic or Paper Copy (as created/received)	Treasurer
Receipts		5 years	Electronic or Paper Copy (as created/received)	Treasurer
Invoices		5 years	Electronic or Paper Copy (as created/received)	Treasurer
Annual Membership List/Database	Includes annual membership list and contact information	5 years	Electronic Copy	Treasurer (President)
Kiah Fund Grant Applications		5 years	Electronic Copy	Treasurer
Approved Meeting Minutes		Permanent	Electronic Copy And Paper Copy (GHS Deposit)	Secretary
Official Correspondence	Regarding grant applications/awards (CMA applying for), community partnerships, new initiatives, etc.	Permanent	Electronic Copy And Paper Copy (GHS Deposit)	Secretary (President)
Final Meeting Agendas		5 years	Electronic Copy	Secretary
New Member Notifications		5 years	Electronic or Paper Copy (as created/received)	Secretary

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Publications	CMA newsletters, brochures, etc.	Permanent	Electronic Copy and Paper Copy (GHS Deposit)	Secretary
Special Projects	Records documenting the initial planning and development of new initiatives and transformative projects	Permanent	Electronic or Paper Copy (as created/received)	Secretary (President)