

Alabama Music Hall of Fame Board

**Functional Analysis
&
Records Disposition Authority**

**Presented to the
State Records Commission
January 23, 2008**

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Functional and Organizational Analysis of the Alabama Music Hall of Fame Board

Sources of Information

Representatives of the Alabama Music Hall of Fame Board
Code of Alabama 1975, Sections 41-9-680 through 41-9-684
Alabama Music Hall of Fame Board Audit Reports
Alabama Government Manual (2006) page 307
Alabama Music Hall of Fame Board Website
Alabama Music Hall of Fame Board Publications

Historical Context

For years, the Muscle Shoals Music Association, a Shoals area based professional organization of recording studio owners, producers, musicians, songwriters, and other music professionals, had advocated for the establishment of the Alabama Music Hall of Fame Board (hereafter referred to as the board). In 1977, the Legislature created the Alabama Music Hall of Fame Board with a mandate to honor all of Alabama's music achievers and to build a facility to showcase these talented individuals. In 1987, voters of Alabama passed a state-wide referendum for the construction of phase one of the project, a 12,500 square-foot exhibit hall, the Alabama Music Hall of Fame. In addition, the Alabama Music Hall of Fame Authority (hereafter referred to as the authority) was created to issue general obligation bonds for the acquisition, construction, installation, and equipping of buildings and other facilities for the Alabama Music Hall of Fame complex. Opened in 1990, the exhibit hall of the Alabama Music Hall of Fame complex, located in the city of Tusculumbia, is the first phase of the project. Phase two of the complex project will be the construction of a 1,500 seat audio/video recording auditorium and a research library on southern music with emphasis on Alabama will be the goal for phase three of the project.

Agency Organization

The Alabama Music Hall of Fame Board consists of seven members appointed by the governor to serve six-year terms. Four members are selected from the Muscle Shoals Music Association and the other three members are chosen from the state at large. Members chosen from the state at large are not employed in the music business. The board selects a chairman, a vice-chairman, a secretary, and a treasurer from its members. The board meets quarterly and the majority of the members constitutes a quorum for transaction of business. The Alabama Music Hall of Fame Authority is a public corporation that consists of the same membership as the Alabama Music Hall of Fame Board. The board appoints an executive director as the administrative head of both the board and the authority. An organizational chart is attached.

Agency Function and Subfunctions

The mandated function of the board is to develop a program to honor those persons who have made outstanding and lasting contributions to music. The authority was created to issue bonds for capital for the construction of various facilities for the Alabama Music Hall of Fame project. It is one of the agencies responsible for performing the client services function of Alabama government. In the performance of its mandated function, the board/authority may engage in the following subfunctions:

- **Promulgating Rules and Regulations.** Code of Alabama, Section 41-9-682 authorizes the board/authority to adopt/alter/repeal rules, regulations, and bylaws as needed to carry out its functions. Also, it may conduct surveys/polls and appoint committees/representatives to assist in its work and activities.

- **Selecting and Honoring.** Mandated by the Code of Alabama, Section 41-9-682, the board is responsible for carrying out the process of selecting those, living or dead, who, by achievement or service, have made outstanding and lasting contributions to music in Alabama, or elsewhere, to be inducted into the Alabama Music Hall of Fame.

In order to be recognized as a music achiever, the individual or an interested party must complete and submit an Alabama Music Achiever Form to the board for consideration. The board reviews the type of achievement, musical style, instrument used by the person, award history, and significant achievements before a decision is made. Once being recognized as a music achiever, this individual may have a chance to be nominated for and inducted into the Alabama Music Hall of Fame.

The nominating committee for inductees is comprised of individuals chosen by board members (two persons by each member) and all remaining past inductees. A ballot outlining the categories and a list of past nominees is sent to the committee for consideration. The committee may also nominate candidates of its choice. Once nominated, the nominee remains on the list of nominees each year until selected for induction, or removal by the nominee or the person who nominated the individual. The committee then chooses three candidates in each category and returns the ballot to the board, where a numerical ranking procedure is used to determine those elected to be inducted. The board plans and hold every other year an induction banquet and awards show to honor the musicians who have been selected for the Alabama Music Hall of Fame.

- **Constructing and Managing the Alabama Music Hall of Fame Complex.** The authority is authorized to issue general obligation bonds in an amount not exceeding \$2,500,000 for construction and equipping of buildings and/or other facilities for the Alabama Music Hall of Fame complex. Completed in 1990, the Alabama Music Hall of Fame and Museum features memorabilia and information about Alabama music achievers and hall of fame inductees. Audio/visual galleries portray the history of the musicians and the music they created, and a well-equipped recording studio allows visitors to sing along

with tracks of their favorite songs while experiencing the latest recording techniques. Future plans for the complex include an audio/visual recording auditorium/theater for music concerts/seminars/workshops and a library for the collection and documentation of music and for music education/enrichment programs.

- **Educating and Promoting.** In addition to the collection and documentation of all aspects of Alabama's famous musicians and their music, the board has implemented an educational outreach program to educate and promote the state's music heritage and achievements. Typical educational/outreach activities may include Alabama Music Hall of Fame concert series, music camps, tours, workshops, publications, and other related events.
- **Administering Internal Operations.** A significant portion of the agency's work includes general administrative, financial, and personnel activities performed to support its programmatic areas.

Managing the Agency: Activities include internal office management work common to most government agencies such as corresponding and communicating; scheduling; meeting; documenting policy and procedures; reporting; litigating; drafting, promoting, or tracking legislation; publicizing and providing information; managing records; and managing information systems and technology.

Managing Finances: Activities involved in managing finances may include the following: budgeting (preparing and reviewing the budget package, submitting the budget package to the Department of Finance, and documenting amendments and performance of the budget); purchasing (requisitioning and purchasing supplies and equipment, receipting and invoicing for goods, and authorizing payment for products received); accountings for the expenditure, encumbrance, disbursement, and reconciliation of funds within the agency's budget through a uniform system of accounting and reporting; contracting with companies or individuals; bidding for products and services; and assisting in the audit process.

Managing Human Resources: Activities involved in managing human resources may include the following: recruiting and hiring eligible individuals to fill vacant positions within the agency; providing compensation and benefits to employees; supervising employees (evaluating performance, disciplining, granting leave, and monitoring the accumulation of leave); and providing training and continuing education for employees.

Managing Properties, Facilities, and Resources: Activities involved in managing properties, facilities, and resources may include the following: inventorying and accounting for non-consumable property and reporting property information to the appropriate authority; leasing and/or renting offices or facilities; providing for security and/or insurance for property; and assigning, inspecting, and maintaining agency property, including vehicles.

Record Keeping System and Records Appraisal of the Alabama Music Hall of Fame Board

Agency Record Keeping System

The Alabama Music Hall of Fame operates a hybrid system composed of paper and electronic records. The board maintains a number of databases to capture and update information on music achievers, inductees, and other program projects. All data is backed up on CDs or Thumb Drive at least weekly. Backups are kept onsite.

Records Appraisal

The following is a discussion of the two major categories of records created and/or maintained by the Alabama Music Hall of Fame: Temporary Records and Permanent Records.

I. Temporary Records. Temporary records should be held for what is considered their active life and be disposed of once all fiscal, legal, and administrative requirements have been met.

- **Alabama Music Hall of Fame Inductee Nominee Files.** Once being recognized as a music achiever, this individual may have a chance to be nominated for and inducted into the Alabama Music Hall of Fame. The nominating committee for inductees is comprised of individuals chosen by board members (two persons by each member) and all remaining past inductees. A ballot outlining the categories and a list of past nominees is sent to the committee for consideration. The committee may also nominate candidates of its choice. Once nominated, the nominee remains on the list of nominees each year until selected for induction, or removal by the nominee or the person who nominated the individual. The retention recommendation for this series is to retain 5 years unless the nominee is removed or inducted for the hall of fame, in which case transfer the file to the Inductee and Special Awards/Recognition Files for preservation.

II. Permanent Records. The Government Records Division recommends the following records as permanent.

Promulgating Rules and Regulations

- **Meeting Agendas, Minutes, and Packets of the Alabama Music Hall of Fame Board and the Alabama Music Hall of Fame Authority.** This series constitutes the core documentation of the activities of the board/authority. Besides documenting the promulgation of rules and regulations, these records provide evidence of other important programmatic activities, including the selection process among nominees for the Hall of Fame. (RDA page 3-2) **(Bibliographic Title: Meeting Agendas, Minutes, and Packets of the Alabama Music Hall of Fame Board and the Alabama Music Hall of Fame**

Authority)

Selecting and Honoring

- **Music Achiever Files.** In order to be recognized as a music achiever, the individual or other interested party must complete and submit an Alabama Music Achiever Form to the board for consideration. The board reviews the type of achievement, musical style, instrument used by the person, award history, and significant achievements before a decision is made. This series contains the files of recognized music achievers, which may include completed forms, photographs, newspaper clippings, and other related information on the achievers. Once being recognized as a music achiever, this individual may have a chance to be nominated for and inducted into the Alabama Music Hall of Fame. (RDA page 3-2) **(Bibliographic Title: Music Achiever Files)**
- **Inductee and Special Awards/Recognition Files.** Once the board inducts a nominee into the Alabama Music Hall of Fame, the nominee file becomes an inductee file. This series consists of biographical data, photographs, and other related materials to document the accomplishments of the inductees. Information on special achievement awards/recognition given by the board is also included. (RDA page 3-2) **(Bibliographic Title: Inductee and Special Awards/Recognition Files)**

Constructing and Managing the Alabama Music Hall of Fame Complex

- **Complex Building Plans and Specifications.** Code of Alabama, Section 41-9-682 (a) authorizes the board to construct a music hall of fame and exhibition facility for the display of exhibits relating to music and musicians. These records document the design, construction, layout of exhibits, and possible changes to the building. They should be preserved for renovation, expansion, and historical purpose. (RDA page 3-3) **(Bibliographic Title: Complex Building Plans and Specifications)**
- **Museum Exhibit Catalog and Control Files.** Code of Alabama, Section 41-9-682 (a) authorizes the board to construct and operate a music hall of fame and exhibition facility for the display of busts, statutes, plaques, books, papers, computerized figures, memorabilia, records, films, audio/video tapes, compact disks, recordings, pictures, and other exhibits relating to music and musicians. This series is composed of paper copies or an electronic database that contain descriptions and other information documenting the history of the exhibits. (RDA page 3-3) **(Bibliographic Title: Museum Exhibit Catalog and Control Files)**
- **Loan Files.** Not all of the items in the display collection belong to the agency. This series consists of records documenting information on loaned items. These files may be useful for research purposes. (RDA page 3-3) **(Bibliographic Title: Loan Files)**

- **Bond Documentation Files.** The authority is authorized to issue general obligation bonds in an amount not exceeding \$2,500,000 for construction and equipping of buildings and/or other facilities for the Alabama Music Hall of Fame Complex. This series consists of key documents (such as resolutions and statements, etc.) that authorize the issuance of bonds for capital outlay purposes. (RDA page 3-3) (**Bibliographic Title: Bond Documentation Files**)

Educating and Promoting

- **Informational and Promotional Publications.** The board creates a number of publications including brochures, pamphlets, educational materials, and induction banquet program booklet. These publications provide documentation of board's educational activities. (RDA page 3-3) (**Bibliographic Title: Informational and Promotional Publications**)
- **Press Releases.** This series consists of statements or announcements concerning the board and its work issued for distribution to the news media and the public. Press releases should be maintained permanently as documentation of the board's attempts to keep the public informed and to promote its programs. (RDA page 3-3) (**Bibliographic Title: Press Releases**)

Administering Internal Operations:

- **Website.** The board has a website at: www.alamhof.org. Subject categories on the web include board members and meeting schedules, a searchable database for hall of fame inductees and brief biographic sketches, special events, tourist information, gift shop, news, and a contact directory. The website should be preserved as it serves as an important medium for communication with the public. (RDA page 3-3) (**Bibliographic Title: Website**)
- **Inventory Lists.** The Code of Alabama 1975, Section 36-16-8[1] requires that “. . . All [state agency] property managers shall keep at all times in their files a copy of all inventories submitted to the Property Inventory Control Division, and the copies shall be subject to examination by any and all state auditors or employees of the Department of Examiners of Public Accounts.” These files need to be maintained in the agency's office.

Permanent Records List

Alabama Music Hall of Fame Board

Promulgating Rules and Regulations

1. Meeting Agendas, Minutes, and Packets of the Alabama Music Hall of Fame Board and the Alabama Music Hall of Fame Authority

Selecting and Honoring

1. Music Achiever Files
2. Inductee and Special Awards/Recognition Files

Constructing and Managing the Alabama Music Hall of Fame Complex

- *1. Complex Building Plans and Specifications
- *2. Museum Exhibit Catalog and Control Files
- *3. Loan Files
- *4. Bond Documentation Files

Educating and Promoting

1. Informational and Promotional Publications

Administering Internal Operations:

1. Website
- *2. Inventory Lists

*Indicates records that ADAH anticipates will remain in the care and custody of the creating agency. ADAH staff members are available to work with agency staff in determining the best location and storage conditions for the long-term care and maintenance of permanent records.

Alabama Music Hall of Fame Records Disposition Authority

This Records Disposition Authority (RDA) is issued by the State Records Commission under the authority granted by the Code of Alabama 1975, Sections 41-13-5 and 41-13-20 through 21. It was compiled by the Government Records Division, Alabama Department of Archives and History (ADAH), which serves as the commission's staff, in cooperation with representatives of the Alabama Music Hall of Fame Board. The RDA lists records created and maintained by the Alabama Music Hall of Fame Board in carrying out its mandated functions and activities. It establishes retention periods and disposition instructions for those records and provides the legal authority for the Alabama Music Hall of Fame Board to implement records destruction.

Alabama law requires public officials to create and maintain records that document the business of their offices. These records must be protected from "mutilation, loss, or destruction," so that they may be transferred to an official's successor in office and made available to members of the public. Records must be kept in accordance with auditing standards approved by the Examiners of Public Accounts (Code of Alabama 1975, Sections 36-12-2, 36-12-4, and 41-5-23). For assistance in implementing this RDA or for advice on records disposition or other records management concerns, contact the ADAH Government Records Division at (334) 242-4452.

Explanation of Records Requirements

- This RDA supersedes any previous records disposition schedules governing the retention of the Alabama Music Hall of Fame Board's records. Copies of superseded schedules are no longer valid and should be discarded.
- The RDA establishes retention and disposition instructions for records regardless of the medium on which those records may be kept. Electronic mail, for example, is a communications tool that may record permanent or temporary information. As for records in any other format, the retention periods for e-mail records are governed by the requirements of the subfunctions to which the records belong.
- Some temporary records listed under the Administering Internal Operations subfunction of this RDA represent duplicate copies of records listed for long-term or permanent retention in the RDAs of other agencies.
- Certain other short-term records that do not materially document the work of an agency may be disposed of under this RDA. Such materials include: (1) duplicate record copies that do not require official action, so long as the creating office maintains the original record for the period required; and (2) transitory records, which are temporary records created for internal purposes that may include, but are not limited to, telephone call-back messages; drafts of ordinary documents not needed for their evidential value; copies of material sent for information purposes but not needed by the receiving office for future business; and internal communications about social activities. They may be disposed of without documentation of destruction. Other items that may be disposed of without destruction documentation include:

(1) catalogs, trade journals, and other publications received that require no action and do not document government activities; and (2) stocks of blank stationery, blank forms, or other surplus materials that are not subject to audit and have become obsolete.

Records Disposition Requirements

This section of the RDA is arranged by subfunctions of the Alabama Music Hall of Fame Board and lists the groups of records created and/or maintained by the agency as a result of activities and transactions performed in carrying out these subfunctions. The agency may submit requests to revise specific records disposition requirements to the State Records Commission for consideration at its regular quarterly meetings.

** denotes agency vital records, defined as records required to carry on its essential operations, to protect its legal and financial interests, and to assist in its recovery during a period of emergency or natural disaster.

■ Promulgating Rules and Regulations

MEETING AGENDAS, MINUTES, AND PACKETS OF THE ALABAMA MUSIC HALL OF FAME BOARD**

Disposition: PERMANENT RECORD.

MEETING AGENDAS, MINUTES, AND PACKETS OF THE ALABAMA MUSIC HALL OF FAME AUTHORITY**

Disposition: PERMANENT RECORD.

Recordings of Meetings

Disposition: Temporary Record. Retain until the official minutes are adopted and signed.

■ Selecting and Honoring

MUSIC ACHIEVER FILES**

Disposition: PERMANENT RECORD.

INDUCTEE AND SPECIAL AWARDS/RECOGNITION FILES**

Disposition: PERMANENT RECORD.

Alabama Music Hall of Fame Music Achiever Application Files

Disposition: Temporary Record. Retain 3 years unless the applicant is approved for the music achiever title, in which case transfer the file to the Music Achiever Files for preservation.

Alabama Music Hall of Fame Inductee Nominee Files

Disposition: Temporary Record. Retain 5 years unless the nominee is removed or inducted for the hall of fame, in which case transfer the file to the Inductee and Special Awards/Recognition Files

for preservation.

Alabama Music Hall of Fame Inductee Nominee Ballots
Disposition: Temporary Record. Retain 2 years.

■ **Constructing and Managing the Alabama Musical Hall of Fame**

BUILDING PLANS AND SPECIFICATIONS**
Disposition: PERMANENT RECORD.

MUSEUM EXHIBIT CATALOG AND CONTROL FILES**
Disposition: PERMANENT RECORD.

LOAN FILES**
Disposition: PERMANENT RECORD.

BOND DOCUMENTATION FILES
Disposition: PERMANENT RECORD.

Bond Records (reports, bank statements, redeemed bonds, and interest coupons, etc.)
Disposition: Temporary Record. Retain 6 years after the bond is fully paid.

Loan Files**
Disposition: Temporary Record. Retain 3 years after the return or disposition of the loaned items.

Museum Visitor Tour and Attendance Records
Disposition: Temporary Record. Retain 3 years after end of the fiscal year in which the records were created.

Museum Gift Shop Operational Records (inventories, purchases, sales, deposits, and disbursements)
Disposition: Temporary Record. Retain 3 years after end of the fiscal year in which the records were created.

■ **Educating and Promoting**

INFORMATIONAL AND PROMOTIONAL PUBLICATIONS
Disposition: PERMANENT RECORD.

PRESS RELEASES
Disposition: PERMANENT RECORD.

■ **Administering Internal Operations**

Managing the Agency:

WEBSITE

Disposition: PERMANENT RECORD. PRESERVE A COMPLETE COPY OF WEBSITE ANNUALLY OR AS OFTEN AS SIGNIFICANT CHANGES ARE MADE.

Routine Correspondence

Disposition: Temporary Record. Retain 3 years after end of the fiscal year in which the records were created.

Board/Authority Appointment Letters

Disposition: Temporary Record. Retain 3 years after the end of the fiscal year in which the term is expired.

Administrative Reference Files

Disposition: Temporary Record. Retain for useful life.

Records documenting the implementation of the agency's approved RDA (copies of transmittal forms to Archives or the State Records Center, evidence of obsolete records destroyed, and annual reports to the State Records Commission)

Disposition: Temporary Record. Retain 3 years after end of the fiscal year in which the records were created.

Copy of RDA

Disposition: Temporary Record. Retain 3 years after end of the fiscal year in which the RDA is superseded.

System documentation (hardware/software manuals and diskettes, warranties)

Disposition: Temporary Record. Retain documentation of former system 3 years after the end of the fiscal year in which the former hardware and software no longer exists anywhere in the agency and all permanent records have been migrated to a new system.

Managing Finances:

Records documenting the preparation of a budget request package and reporting of the status of funds, requesting amendments of allotments, and reporting program performance**

Disposition: Temporary Record. Retain 6 years after end of the fiscal year in which the records were created.

Records documenting the requisitioning and purchasing of supplies and equipment, receipting and invoicing for goods, and authorizing payment for products**

Disposition: Temporary Record. Retain 6 years after end of the fiscal year in which the records were

created.

Records of original entry or routine accounting transactions such as journals, registers, and ledgers; and records of funds deposited outside the state treasury, including bank statements, deposit slips, and cancelled checks**

Disposition: Temporary Record. Retain 6 years after end of the fiscal year in which the records were created.

Contractual records established for the purpose of services or personal property**

Disposition: Temporary Record. Retain 6 years after expiration of the contract.

Agency Audit Reports

Disposition: Temporary Record. Retain 6 years after end of the fiscal year in which the records were created.

Records documenting the bid process, including requests for proposals and unsuccessful responses

Disposition: Temporary Record. Retain 7 years after the end of the fiscal year in which the bids were opened.

Managing Human Resources:

Records documenting payroll (e.g. pre-payroll reports, payroll check registers)**

Disposition: Temporary Record. Retain 3 years after separation of employee from the agency.

Records documenting payroll deduction authorizations**

Disposition: Temporary Record. Retain 6 years after separation of employee from the agency.

Records documenting payroll deductions for tax purposes**

Disposition: Temporary Record. Retain 3 years after separation of employee from the agency.

Records documenting employee hours worked, leave earned and leave taken**

Disposition: Temporary Record. Retain 3 years after the end of the fiscal year in which the records were created.

Records of employee final status**

Disposition: Temporary Record. Retain 6 years after separation of employee from the agency.

Records documenting an employee's work history - generally maintained as a case file**

Disposition: Temporary Record. Retain 6 years after separation of an employee from the agency.

Equal Employment Opportunity Complaint Files**

Disposition: Temporary Record. Retain 3 years after the end of the fiscal year in which the records were created.

Managing Properties, Facilities, and Resources:

INVENTORY LISTS**

Disposition: PERMANENT RECORD. Retain in Office. (Code of Alabama 1975, Section 36-16-8[1]).

Letters of Transmittal

Disposition: Temporary Record. Retain 3 years after the end of the fiscal year in which the records were created.

Agency Copies of Transfer of State Property Forms (SD-1)

Disposition: Temporary Record. Retain 3 years after end of the fiscal year in which the records were created.

Property Inventory Cards and/or Computer Files

Disposition: Temporary Record. Retain 3 years after the end of the fiscal year in which the records were created.

Receipts of Responsibility for Property

Disposition: Temporary Record. Retain until return of item to property manager.

Real Property Leasing/Rental Records

Disposition: Temporary Record. Retain 6 years after termination of lease or rental agreement.

Insurance Policies/Risk Management Records

Disposition: Temporary Record. Retain 6 years after termination of policy or membership.

Requirement and Recommendations for Implementing the Records Disposition Authority

Under the Code of Alabama 1975, Section 41-13-21, “no state officer or agency head shall cause any state record to be destroyed or otherwise disposed of without first obtaining approval of the State Records Commission.” This Records Disposition Authority constitutes authorization by the State Records Commission for the disposition of the records of the Alabama Music Hall of Fame Board (hereafter referred to as the agency) as stipulated in this document.

One condition of this authorization is that the agency submit an annual Records Disposition Authority (RDA) Implementation Report on agency records management activities, including documentation of records destruction, to the State Records Commission in January of each year. In addition, the agency should make every effort to establish and maintain a quality record-keeping program through the following activities:

- The agency should designate a records liaison, who is responsible for: ensuring the development of quality record keeping systems that meet the business and legal needs of the agency, coordinating the transfer and destruction of records, ensuring that permanent records held on alternative storage media (such as microforms and digital imaging systems) are maintained in compliance with national and state standards, and ensuring the regular implementation of the agency's approved RDA.
- Permanent records in the agency's custody should be maintained under proper intellectual control and in an environment that will ensure their physical order and preservation.
- Destruction of temporary records, as authorized in this RDA, should occur agency-wide on a regular basis--for example, after the successful completion of an audit, at the end of an administration, or at the end of a fiscal year. Despite the RDA's provisions, no record should be destroyed that is necessary to comply with requirements of the state Sunset Act, audit requirements, or any legal notice or subpoena.
- The agency should maintain full documentation of any computerized record-keeping system it employs. It should develop procedures for: (1) backing up all permanent records held in electronic format; (2) storing a back-up copy off-site; and (3) migrating all permanent records when the system is upgraded or replaced. If the agency chooses to maintain permanent records solely in electronic format, it is committed to funding any system upgrades and migration strategies necessary to ensure the records' permanent preservation and accessibility.
- The staff of the State Records Commission or the Examiners of Public Accounts may examine the condition of the permanent records maintained in the custody of the agency and inspect records destruction documentation. Government Records Division archivists are available to instruct the agency staff in RDA implementation and otherwise assist the agency in implementing its records management program.

The State Records Commission adopted this records disposition authority on January 23, 2008.

Edwin C. Bridges, Chairman, by Tracey Berezansky
State Records Commission

Date

Receipt acknowledged

David Johnson, Executive Director
Alabama Music Hall of Fame Board

Date