

SAM – FORMS MANAGEMENT

ESTABLISHING THE AGENCY PROGRAM

1705

(Revised 7/2014)

[Government Code Section 14750\(a\)](#) requires the head of each agency to “...establish and maintain an active, continuing program for the economical and efficient management of the records and information collection practices of the agency. The program shall ensure that the information needed by the agency shall be obtained with a minimum burden upon individuals and businesses...”

[Government Code Section 14771\(a\)\(4\)](#) requires the director of the Department of General Services (DGS), through the Forms Management Center (FMC), to “...provide assistance, training, and instruction in forms management techniques to state agencies, forms management representatives, and departmental forms coordinators . . .”

The forms management program is mandatory. Its effectiveness depends on a clear understanding of the responsibilities of the operating agencies, DGS and the FMC. The responsibilities, derived from the statutes cited here are formulated from good business practices and gathered from forms professionals and forms associations.

Forms management is a staff activity. The program should be housed at a level high enough to give the perspective and authority needed for across-the-board improvements and to provide technical guidance and department-wide coordination between functions. The program should be centralized and needs backing, upper-level support, and stature in the organization to be successful.

[Government Code Sections 14771\(a\)](#) and [14775](#) require the director of each state agency to fulfill legislative requirements needed to effectively implement the State Forms Management Program. Such requirements may involve submitting various reports to the DGS FMC.