

Email Retention

City Council Workshop
March 7, 2017



Email Retention

During Phase 1:

- Collected, reviewed and analyzed state and national data regarding email retention
- Determined if there were agencies that provided standards/recognition for organizational transparency
- Analyzed electronic document management systems (EDMS) and cost of implementation
- Analyzed cost of storage if length of retention was increased

Email Retention

- Public records are governed by statute
 - All records are property of the state
 - State Library Director has authority to establish retention schedules
 - Per state retention schedule – retention for electronic communications record (email) depends upon the content of that communication

Email Retention

- Constituent Correspondence – per state retention schedule – 2 year retention
- General correspondence – after administrative value has been served
 - Majority of email have no retention
 - For some email, retention is more than 2 years (Political Committees – 3 yrs. after termination; Zoning Case Files – 20 yrs.)
- Legal implications for keeping records past their retention

Survey Results

- Surveyed 15 states & 17 cities
 - Retention of email is based on content
 - Retention of email on email servers ranged from as little as 30 days to as long as 3 years
- Average retention was 325 days
- Unable to identify any agencies that provide standards/recognition for organizational transparency

Outlook Email System

- Email system is a communication tool not a document management tool
- Averages 1,046,679 emails per month / 12,560,148 per year
- PRR for email – may have to search the entire repository
- Encounter problems searching up to 365 days worth of email
- Staff has to review each record

Current Policies

- Responsibility of the employee to actively manage their email based on content
- Each department has a designated Records Control Officer who is responsible for maintaining records in accordance with retention schedules

Solutions

- Increase retention of email on server
 - Retention was increased from 1 year to 2 years to allow time to study issue
 - There is no increased cost for storage
 - A longer retention period will exacerbate the problems encountered when conducting PRR searches and increase time spent by staff reviewing records
 - User is required to determine the appropriate retention of emails

Solutions

- Update Email Policy
- Develop Ongoing Training for Employees
- Invest in a Document Management System
 - Allows users to import emails into system with one click
 - Able to build in retention based on record type

Solutions

- The document management system will:
 - Be used by departments throughout the organization to manage documents
 - Provide greater transparency to the public
 - Improve search capabilities
 - Clerk's Office will be including a request for funding of an EDMS in the FY17-18 budget in the amount of \$380,000

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Questions?