

City of Bellevue Email Management Policy and Procedures

Overview

In recognizing that email messages that meet the definition of a public record must be managed according to approved records retention periods, the City of Bellevue has implemented a process to support the proper management of email records. It is the responsibility of all City employees and volunteers to manage records according to Washington State law and City of Bellevue policies and procedures.

The city supports appropriate management of email messages through:

- Implementation of an email archiving solution, to provide central storage and access of email messages that meet the definition of a public record.
- Development of user procedures and guidelines, which are tailored to each department's retention requirements.
- A training program to support the proper management of email records. Training is available to all staff through online resources and in-person sessions, in addition to individual consultation upon request. The training material is covered in Bellevue Beginnings (new employee orientation) sessions and is available in the City's learning management system.

Definitions

Public Record. Information in any format, that has been made by or received by the City of Bellevue in connection with the transaction of public business. This includes emails sent and received.

Transitory Record. A public record with short-lived (less than 90 days) administrative, legal or fiscal value. These records do not need to be retained for future reference or information.

***Email Storage* folders.** City designated storage folders that are assigned based on department. Each folder has a retention period assigned to it per the function of the content, so that all emails saved into that folder, or any sub-folders, inherit the retention period. Retention is determined by the function of the content, e.g. planning and project documentation, or administrative working file.

Policy

1. Employees must evaluate all email messages sent or received for record content. Employees shall use the following criteria of a public record to help evaluate the content and retention of each email message:

- Related to City business
- Received for action
- Documents City activities, decisions, or actions
- Mandated by statutes or regulations
- Supports financial obligations or legal claims
- Communicates City requirements

2. All email messages sent or received from a city email address will be automatically retained for 90 days by the City's email archiving software.

Employees have 90 days from the date a message was created or received to determine if an email meets the definition of a public record (see below). All emails that are public records must be retained in their native format for their approved records retention period (WAC 434-662-150). Retention periods are based on functional use of the information contained in each message.

Emails that are transitory in nature and have no retention value shall be purged per the 90-day retention policy and not saved into *Email Storage* folders for longer retention.

3. Messages placed in *Email Storage* folders will be retained for the length of the retention period as approved by the Washington State Local Records Committee and City of Bellevue Records Retention Schedule. Retention of the email depends on the business purpose of the email. The City Clerk's Office has a list of approved retention periods for the *email storage* folders.
4. All email messages remaining in the Inbox, Sent Items, and Deleted Items folders after 90 days are purged from the City's email storage. This process will also purge saved emails that have met their required retention period.
5. In order to comply with records management requirements and the Washington State Public Records Act (RCW 42.56) email messages that meet the definition of a public record must be stored within technology systems supported by the City. The City's email archiving solution is considered the official system of record for City email messages.

Requests for alternative methods for retaining emails must be submitted to the City's Records Management program for approval.

Personal email accounts shall not be used for city business.

6. The creation of new Microsoft Outlook Personal Storage Table (.pst) files is restricted without approved exceptions.
7. Records Management staff will coordinate the transfer of email messages of elected officials, the City Manager, and communications related to official Boards and Commissions to the Washington State Archives per WAC 434-662-150 before they are permanently deleted.

Public Records References

- RCW 40.14 - Preservation and Destruction of Public Records
<http://apps.leg.wa.gov/rcw/default.aspx?cite=40.14>
- WAC 434-662-040 - Preservation of Electronic Public Records: Agency Duties and Responsibilities
<http://apps.leg.wa.gov/WAC/default.aspx?cite=434-662-040>
- WAC 434-662-150 – Preservation of Electronic Public Records: Email Management
<http://apps.leg.wa.gov/WAC/default.aspx?cite=434-662-150>
- City of Bellevue City Code Chapter 2.26 – Public Records
<http://www.bellevuewa.gov/bellcode/bellcc02.html#2.26>

Contacts

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