

# City of Bellevue Email Management

## Standard Operating Procedure

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### Overview

In recognizing that e-mail 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 e-mail records. It is the responsibility of all City employees to manage records according to Washington State law and City of Bellevue policies and procedures.

As of January 2008, the city has supported appropriate management of e-mail messages through:

- Implementation of a technology solution, *emailXtender*, to provide central storage and access of e-mail 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 e-mail records. Training was provided to *all* employees through a training video 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 upon request through the Records Management division.

### Procedure

1. All e-mail messages sent or received that are related to the conduct of City business must be evaluated for record content. The content of each e-mail message should be evaluated against the following criteria of a public record:
  - Created in the course of 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. Messages that meet the definition of a public record should be managed according to their approved retention period.
3. Employees must decide within **3 months** (approximately 90 days) from the date a message was created or received if it meets the definition of a public record. The preferred method of maintaining e-mail records is to migrate them to the appropriate *emailXtender* \*Email Storage\* folder (located in the list of Microsoft Outlook mailbox folders) based on functional categories of each department. Each functional category is tied to an appropriate retention period, in accordance with records management policy.

4. Network Services runs a job on the **first Sunday** of every month to purge all e-mail messages remaining in the *Inbox*, *Sent Items*, and *Deleted Items* folders that are more than 90 days old. This process is run for the accounts of all City e-mail users, with the exception of elected officials, department directors and their deputy directors. Emails belonging to directors and elected officials will be retained indefinitely until a process for transferring archival records to the Washington State Archives has been finalized.
5. Messages placed in \*Email Storage\* folders will be retained for the length of the minimum retention period as approved by the Washington State Local Records Committee and City of Bellevue Records Retention Schedule.
6. City of Bellevue staff will work with the Washington State Archives to review any e-mails that meet the definition of archival records (including e-mails created by department directors, and election officials) before they are permanently deleted.

## Definitions & References

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.
Transitory Record	A public record with short lived (less than 90 days) administrative, legal or fiscal value. Transitory records should be destroyed once that administrative, legal or fiscal use has expired.
Non-Record	Non-records may be created or maintained by city employees, but do not document the organization, functions, policies, decisions, procedures, operations, or other activities of the City of Bellevue.

## Records Management Requirements

RCW 40.14 - Preservation and Destruction of Public Records  
<http://apps.leg.wa.gov/rcw/default.aspx?cite=40.14>

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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