City of Bellevue Email Management
Policy and Procedures

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 an email archiving solutions, 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.

Policy

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 must be managed according to their approved retention period in their native format (WAC 434-662-150).

3. All email messages sent or received from a city email address will be 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. Retention periods are based on functional use of the information contained in each message.
4. 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.

5. On the **first Sunday** of every month all e-mail messages remaining in the *Inbox, Sent Items*, and *Deleted Items* folders that are more than 90 days old are purged from the City’s email storage. This process will also purge saved emails that have met their required retention period.

6. 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.

7. As of January 2014 the creation of new Microsoft Outlook Personal Storage Table (.pst) files is restricted without approved exceptions.

8. Records Management staff will coordinate the transfer of email messages of elected officials, department directors, and communications related to official Boards and Commissions to the Washington State Archives per WAC 434-662-150 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  

WAC 434-662-040 - PRESERVATION OF ELECTRONIC PUBLIC RECORDS  
Agency Duties and Responsibilities:  

WAC 434-662-150 – Preservation of Electronic Public Records: Email Management  

City of Bellevue City Code Chapter 2.26 – Public Records  
[http://www.bellevuewa.gov/bellcode/bellcc02.html#2.26](http://www.bellevuewa.gov/bellcode/bellcc02.html#2.26)

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<thead>
<tr>
<th>Policy</th>
<th>Technical Support</th>
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<tbody>
<tr>
<td>Kyle Stannert, Public Records Manager</td>
<td>IT Helpdesk</td>
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<td>x6021 <a href="mailto:kstannert@bellevuewa.gov">kstannert@bellevuewa.gov</a></td>
<td>x2886 <a href="mailto:support@bellevuewa.gov">support@bellevuewa.gov</a></td>
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