

## **EMAIL RETENTION**

Staff should be aware that email messages are public records when they are created or received in the transaction of public business. The Email Retention Policy is intended to help employees determine what information sent or received by email should be retained and for how long. This policy is meant to address typical records that may be contained in email and does not necessarily reference other types of records, such as paper or other types of electronic files or data. Those records are covered in depth by the State of Washington general records retention schedules for all agencies.

Additionally, records whose content and function are substantially the same as a record described in the general records retention schedule for the state's school districts and educational service districts will be considered covered by that schedule. See: <http://www.secstate.wa.gov/archives/pdf/School%20Districts%20March%202003.pdf>.

The Superintendent is directed to develop procedures to facilitate following the policy.

The information covered in these guidelines includes, but is not limited to, records that are either stored or shared via electronic mail. If instant messaging is used for official business, you must also retain instant messages.

All employees must familiarize themselves with this email retention policy and retention policies specific to their department.

Questions about the proper classification of a specific piece of information should be addressed to Public Records Officer.

### **Scope**

This email retention policy is secondary to the State of Washington retention policy; any current public record requests for specific public records; and any litigation hold notices for records in response to potential litigation. The **sender** is responsible for retaining emails within the WSD. The **recipient** is responsible for retaining emails that originate outside the WSD. Email retention is generally subject to the following retention periods:<sup>1</sup>

- Transitory administrative records (until need for documents is satisfied);

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<sup>1</sup> Employees should review the State of Washington general records retention schedule that pertains to their programs and responsibilities, such as records relating to accreditation, ADA accommodations, agendas and minutes of meetings, attorney general correspondence, audit files, business records and contracts, executive level correspondence, facilities use requests, formal student complaints, information services records and logs, legal issues files, legislative contacts and lobbying, newsletters, personal injury claims, personnel records, planning and working files, policies and procedures, press releases, public disclosure requests and responses, public information requests, rule-making files.

- Routine correspondence below the executive level of the WSD, involving day-to-day office administration and activities that do not concern policies and procedures (30 days);
- Executive level documentation, including minutes, agendas, organizational charts, reports, studies, news releases, and correspondence (4 years – Superintendent's Office);
- Non-executive level planning and working files (2 years – originating or designated office)

### **Common Categories Explained**

**Transitory administrative records:** Records which have no administrative, legal, fiscal, or archival requirement for their retention. These records include personal messages and announcements not related to business; information-only copies; copies of published materials; duplicate copies; preliminary drafts; internal requests for information; transmittal memos; reservations and confirmations; routine WSD admission letters. (Retain until administrative need is satisfied).

**Routine correspondence:** Routine correspondence concerning day-to-day office administration and activities. These records include intra-agency correspondence; routine correspondence with other agencies; and correspondence with the public on routine matters. This category does not include executive level correspondence or correspondence concerning policies and procedures. (Retain for 30 days).

**Executive level documentation:** These records include correspondence and memos at the executive level to and from public officials, the public, and others, concerning policy issues, concerns, actions, or issues. (Retain for 4 years in the Superintendent's office).

**Non-executive planning and working files:** These records include project design plans, survey forms, charges, diagrams, statistics, preliminary analysis reports, research materials, drafts, and other documentation related to management studies, non-fiscal audits, surveys, and planning studies. (Retain for 2 years in originating office or designated office).

### **Encrypted Communications**

E-mail, and any attachments, containing confidential information shall be encrypted from the sending device to the receiving device. The ability to un-encrypt sender's message through authorized process; sending organization must be able to un-encrypt and retrieve originating version of sent message.

Encrypted communications of confidential information should be stored in a manner consistent with WSD's policy, but in general, information should be stored in a decrypted format unless it is confidential personnel, business, protected health or financial information. Please check with the WSD's technology department to obtain the appropriate licensed encryption software.

**Adopted: July 25, 2008**