# Email Retention Policy Overview

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**2014 Email Retention Task Force**

- Convened by a Board resolution to review existing policy when the automated enforcement of a maximum one year retention for email was called into question before being implemented.

- The 13 member Task Force included representatives from LAUSD, UTLA, AALA,CSEA, and Board member Galatzan.

- Unanimous recommendation to extend the default retention period to two years, with exceptions for longer retentions for those with legitimate business or legal needs.

- The two year retention period allows the District to comply with Public Records Act requests without being unduly burdened.

# Policy Recommendations

- Enforce a 2-year minimum retention for all email.

  Email from the last 2 years will be preserved and accessible to the district even if the end user deletes the email from their inbox. Unless tagged or placed on a legal hold, emails older than 2 years will be automatically deleted.

- Allow all users to tag any of their emails with a 4 –year or 7-year retention.

  *Any tagged emails will be retained beyond the 2-year minimum retention to meet the user's retention requirements.*

- An exception process will be part of the roll out of the email retention policy to identify any group or business process that requires retentions beyond the 2-4-7 default.

- Holds can still be placed on any email to support any legal action or regulatory audit of the District's emails to prevent their automatic deletion.

# Why is this Important

**Preserves information valuable to the District**

- Employees must take action to identify emails that are records and flags them to be preserved

- Much of the information on emails is transient, trivial, and of little ongoing value to the District. Some examples include: personal messages, announcements, promotions, "Thank you" emails, as well as emails that are conversational or have little ongoing value, such as discussions coordinating a meeting.

**Reduces costs**

- Eliminates expenses related to the storage, preservation, indexing, searching, and processing of unnecessary information

- While the actual cost of storage may be minimal recent studies with public agencies have found that as much as 90% of the cost of Public Records Requests comes from the cost of labor to search, filter, and redact information from their repositories

**Improves operational efficiency**

- Eliminates low value, redundant, outdated, incomplete, inaccurate, and trivial information

- By disposing of unnecessary information, it is easier to retain, access, and protect necessary information, searches are more efficient (less "garbage" to sort through) and results in providing information that is timely, accurate, and responsive

**Protects Personal privacy**

- The best way to protect personal or non-public information is to dispose of it when no longer needed

## Phased Approach

- **Communications** (ongoing)– Prior to implementation employees will be notified of the policy change and implementation schedule then given the opportunity to tag any emails that need to be retained longer than the two-year default retention.

- **Pilot** (3/2017 – 12/2017) – A pilot of the phased Roll Out will be conducted prior to implementation. This will test the technical mechanics of deleting and preserving emails in production, but also will test the communications and training materials to ensure employees can properly tag and preserve the emails they need. Future phases may be adjusted based on the results of the pilot.

- **Phase 1** (6/2018) - All emails older than seven years will be deleted unless they are on hold.

- **Phase 2** (9/2018) - All emails older than four years will be deleted unless they are on hold, or have been tagged with a longer retention.

- **Phase 3** (12/2018) -  All emails older than two years will be deleted unless they are on hold, or have been tagged with a longer retention.

**Review Emails**

- Focus first on Emails older than 7-years

**Preserve Records**

- Remove attachments that are records and place them in an appropriate repository (Such as File Net, SharePoint, or other document management system)

- Move emails that are records to an appropriate repository

- If no repository is available, tag emails with a 4 or 7 year retention

- If there are emails that must be retained longer than 7 years, request an exemption
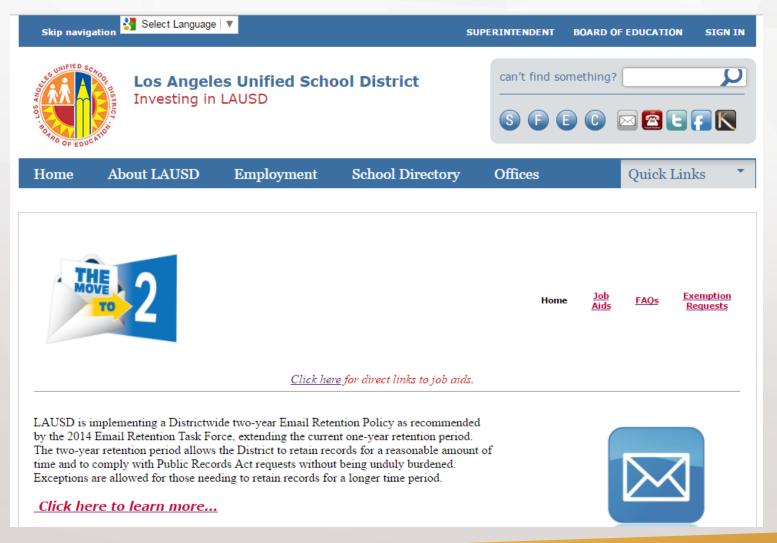
**Capture Institutional Knowledge**

- Move non-record emails that are personally important to your OneDrive, or other personal storage

*NOTE: Email PST Files and Personal Archives should not be saved*

# Email Retention Website

http://achieve.lausd.net/emailretention

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**http://achieve.lausd.net/emailretention**

**http://achieve.lausd.net/Records**

Thank you!