

Email Retention Guidance

For Elected Officials, Staff of Commissioners' and Mayor's Offices, and Bureau Directors

Email pertaining to City business is a public record. This document provides direction for Electeds, Staff of Commissioners' and Mayor's Offices, and Bureau Directors in the proper disposition of their email. The guidelines for incoming and sent emails are below, with examples and additional details on the back of this page for reference.

Sent Email

All non-transitory sent email should be saved to TRIM by sender.

See "*Deletion of Transitory Information*" handout for further guidance.

Received Email

All email pertaining to City business received by Elected Officials, Staff of Commissioners' and Mayor's Offices and Bureau Directors should be retained and sent to TRIM ***with the following exceptions.***

You may delete, with no action:

Emails received from City accounts:

- That are Citywide announcements
- That are addressed to multiple electeds or bureau heads and concern responsibilities that belong to another elected or bureau office
- That are clearly transitory in nature e.g., "there are extra donuts in the break room"

Emails received from non-City accounts:

- Unsolicited advertisements, listserve messages, or messages clearly unrelated to City business

You may delete after the described action:

- An incoming email after you have forwarded the complete original email, including any attachments, to the responsible person in your office or elsewhere (your forwarded email will be captured as a sent item)
- An incoming email after you have replied to the sender, as long as your reply includes the complete original email with any attachments (your email response will be captured as a sent item)
- An incoming email that serves only to transmit an attachment, after you have captured the attachment and are maintaining it appropriately

Please contact the **Archives and Records Management Division** of the City Auditor's Office with questions.

Ext. 5-4100 or parc@portlandoregon.gov

Examples

Scenario 1

The BHR Director sends out an email asking all City managers to review and provide comments on the attached proposed Administrative Rule updates, and to forward the email to all their staff. Who has to retain what?

- The BHR Director has to retain the initial email sent.
- The Water Bureau, for example, Director (or designee) forwards the email to all WB staff: that email must be retained by whoever sent it (Director or designee). The incoming email from BHR may be deleted.
- The Water Bureau Director (or designee) collects all staff comments and emails them to the BHR Director. That sent email needs to be retained.
- The emails that are returned to the BHR Director do not need to be retained by the BHR Director as long as the information in them is collected, captured elsewhere and evaluated as part of the update project.

Scenario 2

A Citywide email goes out notifying all users that server maintenance will take place the following Tuesday. Who has to retain what?

- The sender must save the Citywide email. No other elected officials or bureau directors or their staff need to retain this email. (If the email was sent using the BTS Director's email account, the BTS Director would need to retain it).

Scenario 3

A citizen emails the Mayor with a concern about the Oregon Zoo. A staff person replies on behalf of the Mayor that this particular concern would best be addressed by Metro, which oversees the zoo. Who has to retain what?

- The response to the citizen must be retained by the Mayor's Office. The incoming email may be deleted as long as the reply contains the complete original email, including any attachments.

Scenario 4

An email is received by all elected officials expressing outrage at the war in Afghanistan. The "To" line includes the President, Members of Congress and a host of others. Two Portland Commissioners choose to respond to the email. The Mayor, the Auditor and the other two Commissioners do not respond. Who has to retain what?

- The Electeds who responded must retain their response and may delete the incoming message as long as their reply contains the complete original email, including any attachments. The Electeds who did not respond may delete the incoming message since it does not pertain to City business.

Scenario 5

An email is received by an Elected's Chief of Staff concerning a federal policy that may or may not affect the City and warrants no response. The information in the email can be obtained elsewhere. Who has to retain what?

- The Chief of Staff may retain the email for reference purposes, or may delete it since it does not pertain to City business.

THESE RETENTION/DELETION SCHEDULES ARE SUSPENDED (AND ALL RELEVANT RECORDS MUST BE PRESERVED) WHEN THERE IS A LITIGATION HOLD OR PUBLIC RECORDS REQUEST.