Email Management

Answering yes to any of the following questions indicates that the email is a record:

- Does the message approve or authorize actions?
- Does it signify a policy change or development?
- Does it commit your department or the organization to an arrangement such as hosting an event or program?
- Does it contain advice, provide guidance or constitute formal communications with people inside or outside the organization?
- Am I required to act upon it?
- Is it something I have used to make a work-related decision?

Email classification for retention:

- Transactional
  - Document routine general office activities.
- Facilitative
  - Serve to protect the rights and document the obligations of the College; demonstrate compliance with statutory and regulatory requirements; and document organizational activities.
- Strategic
  - Document the College's development, decision-making process, and cultural history. Because of their historical importance, they are considered archival records.

Recommend retention periods:

- Transactional
  - 30 days or less
  - Invitations, announcements, Kronos time reports, etc.
- Facilitative
  - 3-5 years
  - Discussions that facilitate strategic initiatives, or clarify the reasons for those initiatives, emails that function as meeting agendas, meeting packets, or interim reports.
- Strategic
  - Permanent
  - Final policy level documentation communicated in email such as reports, meeting minutes, final policies press releases or directives.

Best Practices:

- Create folders and sub-folders
  - Transactional, facilitative, strategic
- Assign policy to folders based on approved retention schedules
- Do not keep more than one format of your email record
- Remove attachments and store them on a shared drive or in a managed system (include the email if the attachment will lack meaning without it)

Remember: Your email account is not a repository for documents.