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Date	Ver.	Action By	Action	Result
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**TITLE:**

**CITY E-MAIL MANAGEMENT POLICY**

**DEPARTMENT:** CITY MANAGER’S OFFICE/CITY CLERK DIVISION

**PRESENTED BY:** BRENDA GREEN, CITY CLERK

**CONTACT INFORMATION:** BRENDA GREEN, CITY CLERK, (714) 754-5221

**RECOMMENDATION:**

Staff recommends the City Council adopt Resolution No. 2023-XX approving the City E-Mail Management Policy.

**BACKGROUND:**

At the present time, the City of Costa Mesa does not have a policy specific to e-mail management, even though e-mails are generally covered by the City’s minimum retention period. The proposed E-Mail Management Policy provides that e-mails sent or received by City personnel shall be retained for a period of two-years based on the send date of the message. The two-year retention period allows the City to manage the data and is in line with best practices for public organizations. E-mail from the last two years will be preserved on the City IT servers, except those related to specific litigation holds, which may require longer retention.

Upon the adoption of this Resolution, the City Clerk’s office and the Information Technology Department will produce a timeline for the implementation plan for all City employees with an email account. Further procedures and training will be developed for determination of what e-mails should be retained beyond the two year minimum retention period consistent with the City’s records retention policy by Department and program area.

Failure to follow proper retention practices has and will continue to result in ever-increasing costs for additional storage space. Moreover, and of greater concern, it hampers the City's ability to get its computer infrastructure, website and servers back online after a power outage due to the extraordinary volume of e-mails that the City currently holds. A two-year retention policy will enable swift recovery of the exchange mail server much faster after an emergency or catastrophic issue. Given the growing frequency of erratic storm events, and the need for City employees to communicate effectively during an emergency, it is imperative that City servers have the capacity to reinstate email and other electronic communications quickly and effectively.

Additionally, there are further benefits to adopting the e-mail management policy. These include:

- Reduced I.T. infrastructure costs that results in lower storage requirements.
- Improved e-mail management efficiency and server performance.
- The ability to easily search and locate e-mails from indexed content allows the I.T. Department to reduce the amount of time searching for the information.
- Enables faster litigation compliance.

For further example, in late September of 2019, the exchange mail server suffered a catastrophic database issue, during which time, there was no access to email. To remedy this issue, I.T. staff restored the database to the last current system backup. This backup took more than 12 hours to restore. With an e-mail management policy in place, the restore time would have been reduced significantly, resulting in e-mail service being restored faster, which is of benefit to the efficiency of the City's residents, businesses and staff.

### **ANALYSIS:**

The City desires to reduce the storage of old e-mails on the City I.T. servers, to enable faster search capability, and permit productive workflows. Cleaner and more relevant E-mail management policies optimize efficiency in the e-mail servers and saves on expensive data storage and staff time and resources.

### **ALTERNATIVES:**

The City Council may choose to not adopt a two-year retention period for e-mails, thereby e-mails would be maintained on the servers forever or for such period as the Council directs. However, staff does not recommend the option of retaining e-mails indefinitely, as it does not ensure efficiency and does not save City resources.

### **FISCAL REVIEW:**

The City will realize significant savings both in labor and storage expenses; including the reduction in future storage space requirements specific to e-mails.

### **LEGAL REVIEW:**

The City Attorney's Office has reviewed this report and the attached resolution and policy and approves them as to form.

**CITY COUNCIL GOALS AND PRIORITIES:**

In accordance with the adopted 2019 City Council Goal No. 3c - Modernize our City's IT infrastructure comprehensively and strategically to save City resources, the City desires to reduce the storage of old emails on the City servers, and save staff time and resources.

**CONCLUSION:**

Staff recommends the City Council adopt Resolution No. 2023-XX approving the City E-Mail Management Policy.