

EMAILS

How do I manage my e-mail?

Good e-mail management begins with keeping only emails identified as "records" and systematically deleting "non-records." These terms are defined in San Diego Municipal Code section 22.2602.

What kind of an e-mail message is considered a record?

An e-mail message is a record if it was created or received by the City and is evidence of its operations. Examples include e-mail correspondence from public citizens about a project, or staff input sent by e-mail concerning a policy revision.

How long should I keep e-mail?

It depends. The content of an e-mail determines how long an e-mail should be kept. Please check your department's records disposition schedule or the citywide Records Disposition Schedule for retention timelines.

How do I store e-mail records?

The e-mail delivery system is not a records storage system and employees should not be using it as such. E-mail records with permanent retention periods should be printed out in paper format and filed as appropriate. Other e-mail messages with shorter retention periods should be removed out of the e-mail delivery system and stored in the "H" or "Shared" drive network and monitored on a yearly basis so that the records are deleted from the system once their retention period expires. Alternatively, your department head may use a trusted method.



RECORDS MANAGEMENT CONTACT INFORMATION

Tel: (619) 236-6143
Fax: (619) 236-6034
Email: cityclerk@sandiego.gov



Records Management Frequently Asked Questions



ELIZABETH MALAND
Office of the City Clerk
202 C Street, MS 2A
San Diego, CA 92101
(619) 533-4000
www.sandiego.gov/city-clerk

RECORDS MANAGEMENT

What is Records Management?

Records Management is the systematic control of records throughout their life cycle which includes the creation, receipt, maintenance, use, and final disposition of records.

Why is Records Management Important?

Information is at the center of every organization, Federal, State or local government municipality. Records must be managed cost effectively and efficiently for retrieval purposes and also to comply with legal regulations, legal holds, request for public records, and recovery from disasters.

What is a Record?

A Record is recorded information of any kind and in any form, created or received by the City that is evidence of its operation. Records include paper and electronic documents, electronic databases, electronic mail, correspondence forms, photographs, film, sound recordings, maps, and other documents that have administrative, legal operational, fiscal or historical value requiring retention of the record for a specified period of time.

What is my role as a City Employee?

Every city employee is responsible for the records they produce including electronic mail and should know the basic procedures of records management.

Which policies apply to Records Management?

1. *City Administrative Regulation 85.10*
2. *Council Policy 000-25*

Which laws apply to Records management?

1. *San Diego Municipal Code, Chapter 2, Division 26*
2. *Each department may have applicable laws concerning their own records' retention requirements.*

Who do I contact if I have further questions about Records Management?

City Clerk, Records Management

VITAL RECORDS

When was the Vital Records Program established?

The San Diego City Council established the program in July of 1986.

What are Vital Records?

Records that are crucial in assisting departments to get back to business as soon as possible after a disaster.

What types of records are normally considered Vital Records?

Records such as: City Charter, Municipal Code, tax and financial records, utility systems, land records, list of safety personnel and list of locations of emergency supplies, Articles of Incorporation, City Council resolutions, minutes and ordinances.

What is the percent of Vital Records for an organization?

Normally, vital records makeup only two to five percent of an organization's total volume of records.

How long are Vital Records kept?

Vital Records that contain static information that does not change is kept permanently. However, some vital records that have short term retention such as annual budget records, bank reconciliation files, and certificate of sales are kept until superseded by the new information and then the old information is tossed.

How do I know if a record is vital?

- *Identify the key functions/ responsibilities of your office first, and then give some consideration to the following questions:*
 - ⇒ *Is this information obtainable from another source?*
 - ⇒ *What function will we be unable to do if this record is destroyed?*
 - ⇒ *What will be the consequences to the City if these records are lost? Will any employee or public citizen suffer loss of rights or be severely inconvenienced if these records are lost?*
 - ⇒ *If these records have to be reconstructed, what will be the cost in terms of time, money and or labor? Will the information in these records have to be reconstructed or could operations be maintained without this information?*