



# E-Mail Management for Smaller Organizations

February 24 and 26, 2009

# Agenda

- Current Challenges Faced by Municipal Governments
- Current E-mail Management Issues
- Types and Uses of E-mail
- Review of E-Mail Requirements and Responsibilities
- The Bad News
- The Good News
- Technology Options
- Process Options
- Next Steps

# Why Manage Email?

- Email has become a valuable tool in improving both personal and business communication. However, as a result:
  - Volume of emails received is increasing exponentially
  - Cost to house and manage email is increasing at a similar rate
  - Line separating personal and professional email is dissolving
  - Legal liability is increasing
  - Time and effort expended to search and retrieve information contained in emails is increasing

# Challenges Facing Municipal Governments

- Municipalities have some unique challenges as they begin to manage their electronic messaging information:
  - Change in technology are out-pacing the ability of government entities to keep up.
  - Constituents requesting responses in newest communication methods
  - E-mail has grown from an informal communication tool to a formal business management tool with no formal delineation
  - Limited budget for records management

# Functions of Business Email

- Email is an integral part of our everyday lives and serves the following purposes at work:
  - Incidental communication – *"Can we reschedule our meeting?"*
  - Discussions both internally and externally
  - Decision making
  - Approvals – *"Please give Andy access to the database"*
  - Other substantive communication – Contract review, etc.

# Requirements and Responsibilities

- The basic requirements and responsibilities for those managing their email are:
  - Retain appropriate email messages and corresponding attachments
  - Produce emails w/ attachments within a reasonable amount of time for purposes of OPRA, eDiscovery and/or general business use.
  - Delete when retention period has been reached.

# Externally-hosted Email Solutions

- Free or low-cost email
  - Email packaged with Internet services e.g. Comcast, Verizon
  - Public domain e.g. Yahoo, Hotmail, Gmail
  - Personal email accounts
  - Platform providers e.g. Facebook, LinkedIn
- Externally hosted e-mail on your own domain  
(brian@mytownship.org)

# Issues with Free Hosted Email Solutions

- Although these email solutions appear to be a quick, easy and no/low cost, they actually present more problems than solutions:
  - Lack of security
  - Lack of administrative control
  - Inability to control archive content
  - Inability to capture e-mail header data

# The Bad News

- Constituent expectations of technology usage are increasing
- Increasing pervasiveness of electronic communications
  - More e-mail
  - Instant messages
  - Text messages
  - What's next?
- Reliable archives are a requirement
- Automating e-mail retention requires complex and expensive software applications

# The Good News

- Improvement doesn't require large investment in technology
- Many improvements can be achieved by current staff with limited investment

# Technology Options

- Third-party e-mail hosting
  - Written contract with specified retention and access guidelines
  - Reliable archiving
  - Legal hold capabilities
  - Appropriate security
- File server with shared folders and a document taxonomy
  - Works with outlook, outlook express, or other local e-mail program
  - Direct user action to migrate documents from e-mail system to the server
  - Manage server content same as other municipal records

# Process Options

- Establish guidelines for categorizing e-mails
- Set up a structure for filing e-mails and e-mail content
- Perform regular record purging (electronic same as paper)
- Institutionalize follow-up
  - Personal responsibility
  - Include in job description/ development plan
  - Ongoing training
  - Formal follow-up

# Next Steps

- Promote Awareness
- Check Contracts with E-Mail Providers
- Develop Written Guideline
- Implement Ongoing Follow-up

# SMART Overview

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- Over 650 professionals
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