

Head, Clara & Maria Policies and Procedures			
DEPARTMENT: Administration			POLICY #: A-02
POLICY NAME: Email Management Policy			
DATE:	REV. DATE: April 2021	APPROVED BY:	PAGE #: 1 of 3

## POLICY STATEMENT

It is the responsibility of all employees to safeguard information transmitted via email that is deemed to be a “record” or have information value by storing the email in a designated storage repository, or file, as soon as practicable in order to ensure the record is managed corporately, and to prevent the untimely destruction. All emails/information maintained in an email tool, such as Outlook, that is maintained by the Corporation, may be kept in the email tool, such as outlook, for a period of time up to 365 days from receipt or sending, and by not storing the email in the designated repository is therefore deemed by the employee/recipient/sender to be “transitory” in nature, has no business value, and should be deleted.

## PURPOSE

1. Establish a culture through education and policy that information received via email has value.
2. Establish required processes and tools to support the principle that information within an email that is deemed to be of business value shall be managed in accordance with this Administrative Policy, and shall be stored in the designated storage repository, or file, as soon as practicable, but no later than 365 days from receipt/sending.
3. Establish a culture that accepts that transitory email not stored in the designated storage repository, or file, is thereby determined by the employee/recipient/sender not to be a record having business value, and shall be automatically subject to deletion within 365 days from the date it was received or sent.

## DEFINITIONS

The following definitions are critical to the application of this policy:

**“Information”:** Any documented communication or representation of knowledge such as facts, records, Data and Datasets, Data Products, or opinions in any medium or form, including textual, numerical, graphic, cartographic, narrative, or audiovisual forms, in custody and control of the Corporation.

**“Information Management”:** The means by which the Corporation plans, identifies, creates, receives, collects, organizes, governs, secures, uses, controls, disseminates, exchanges, maintains, preserves, and disposes of its information; as well as any means through which the Corporation ensures that the value of that information is identified, captured and utilized to its fullest extent.

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## SCOPE

This policy applies to all Municipal staff, Council, contractors and service providers who have responsibilities regarding any information in the custody and control of the Corporation, received or sent via email.

## RESPONSIBILITY

Clerk-Treasurer:

- Ensure all corporate email users, including employees and Council, are aware of their responsibility to manage information in accordance with this email policy.
- Support efforts to address non-compliance with this policy.
- Provide access to learning opportunities to ensure staff and Council have the skills and knowledge to comply with applicable policies.

Information Users:

- Comply with, support and operate in accordance with this and other Information Management Policies.

## APPLICATION

Records/documents are created or acquired, regardless of their medium, because they enable and document decision-making in support of programs, services and ongoing operations, and support departmental reporting, performance and accountability requirements. Examples of records include, but not limited to:

- Transactions: orders, receipts, requests, confirmation
- Interactions between clients, vendors, partners, or other departments and agencies
- Planning documents: budgets, forecasts, work plans, blueprints, schematics
- Reports, policy, briefing notes, memoranda, or other papers supporting business activities
- Meeting documents: agendas, official minutes, records of decision
- Committee documents: terms of reference, list of members
- Client records: applications, evaluations, assessments
- Records of discussions, deliberations, or any situation that documents the decisions made along with the logic used

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### TRANSITORY FILES

Transitory documents are of little information value, are temporary in nature, required for a short time to ensure the completion of a routine action. Transitory documents do not document the initiation or conduct of business and is not retained for statutory, legal, fiscal, administrative, operational or archival purposes. Transitory records do not set policy; establish guidelines or procedures; document core functions or activities of the corporation; require official action or have any documentary, archival or evidential value.

Examples of Transitory Records include, but no limited to:

- Working drafts of no particular significance that were never formally circulated;
- Annotated drafts where annotations become part of a subsequent version and do not provide evidence of decisions related to the evolution of the final document;
- A copy of a document kept for ease of reference or convenience only;
- Data that has been extracted from an existing business record; and
- Casual communications such as invitations to events, launches or lunch.