



Purpose:

Email has become a widely used service that enhances communication among those in our diocese. This Email Retention Policy is intended to help staff determine what information sent or received by email should be retained and for how long. This policy establishes the default retention periods for email and the responsibility for implementation of this policy. This policy will go into effect beginning January 1, 2010.

Background:

The volume of email in our system is increasing exponentially. Similarly, the size of emails has also been increasing. The combined effect has put considerable stress on our IT infrastructure needs for storage and management of email, causing significant financial and IT infrastructure challenges.

In addition, new rules governing the discovery of electronically stored information in emails, voice-mails, documents, files, databases, etc have come into place. Written retention policies combined with proof that the policy has been implemented and is being followed are necessary to show that deletion of information was in good faith.

Scope:

This retention policy applies to:

1. The email system provided by the Diocese of London
2. All email users and email account holders of the Diocese of London
3. All emails sent and received using the Diocese of London email system

Policy:

Default Retention Period

The Diocese of London email system will be configured to automatically delete emails that are more than **120 days old**. This automatic deletion applies to emails within the Inbox folder, Sent folder, Draft folder, etc. This automatic deletion will begin January 1, 2010.

Our email system will also be configured to automatically delete all emails in the Deleted Items folder that are more than **30 days old**. This automatic deletion will begin January 1, 2010.

Backup Files

Backup copies of the Diocese of London email system are created daily. These backup files are for system restoration in the case of a disaster and are not designed for retrieval of deleted emails.

Transitory Email Messages

Most emails are created primarily for routine communication similar to telephone communication. These emails are considered **transitory** messages that do not have "lasting value". Examples of transitory emails are:

- Notices about meetings or events
- Internal requests for information
- Announcements, etc
- Personal emails

Transitory email messages should be handled as follows:

1. Read and promptly delete or
2. Read and keep in your email Inbox for no longer than the default retention period (120 days) or until its usefulness has ended which ever is less and then promptly delete
3. If your work requires you to keep the email for a longer period than the default retention period, (120 days), then print it and promptly delete the email.

Lasting Value Emails

Emails regarded as having “**lasting value**” would fall into one of the following groups, including legal and canonical documents.

- Administrative
- Personnel
- Financial
- Property
- Cemetery
- Publications
- Sacramental

Emails of **lasting value** must be kept according to the schedule and organization method set out by the parish priest or office director.

Email systems are not designed to be records management systems. Email systems do not have searching capabilities or classification structures. Therefore, all emails that are of **lasting value** should be handled as follows:

1. **Lasting value** emails must be moved to a dedicated storage system (either electronic or paper) according to the filing procedures for permanent records that have been set out by the office or parish.
2. **Lasting Value** emails should **not** be stored within the individual's email folders.

Responsibility for Retention of Emails with Lasting Value

Lasting value emails and/or their file attachments should be retained by either the originator or the parish/office responsible for their safe keeping. Other recipients should not retain emails or their file attachments longer than required for their respective job purposes. When that need no longer exists, the information should be destroyed. If you are unsure whether an email is of lasting value or whether it is no longer needed, it is your responsibility to seek assistance.

All those who use the Diocese of London email system are expected to:

1. Regularly check for new messages.
2. Routinely move messages with lasting value to the office/parish permanent records system.
3. Delete transitory messages as quickly as possible.

All staff of the Diocese of London should familiarize themselves with the Email Retention Policy. Questions about the proper classification of a specific piece of information should be addressed to the director of your office or the parish priest. Questions about these guidelines should be addressed to ccote@rcec.london.on.ca.

Additional Resources

The Diocese of London Email Retention Policy is also available on-line at www.iss.rcec.london.on.ca/emailretention.pdf

In addition, a slide show presentation on Effectively Managing Your Email including methods for moving emails offline is available on the ISS web site at www.iss.rcec.london.on.ca/emailmanagement.ppt. All staff are encouraged to view this presentation.

To improve communication and productivity please review the document on Email Etiquette at www.iss.rcec.london.on.ca/emailetiquette.pdf

The record retention schedule outlined by the United States Catholic Conference of Bishops can be viewed at <http://www.usccb.org/bishops/dfi/retention.htm> .