



SHAKER HEIGHTS

Records Commission Shaker Heights City Hall, Conference Room B Thursday, May 16, 2019, 11:00 AM

1. Approval of November 15, 2018 minutes

Documents:

[RECORDS COMMISSION.PDF](#)

2. Sona Vault Presentation
3. Other
4. Adjournment

To request an accommodation for a person with a disability, call the City's ADA Coordinator at 216-491-1440, or Ohio Relay Service at 711 for TTY users.



**Records Commission Minutes
Thursday, November 15, 2018
10 A.M.
City Hall - Conference Room B**

Members Present: William Gruber, Director of Law
Jeri Chaikin, Chief Administrative Officer
Jeremy Bendik-Keymer, Citizen Member
Alicia White, Chairperson
Angela Williams, Secretary

Others Present: Joanne Dutches, Housing Inspection
Cheryl Arslanian, Finance Department
Quiana Player, Recreation Department
Brandon Bowling, Recreation Department
Karen Traylor, Police Department
John Cole, Police Department
Chris Sterger, Public Works

The meeting was called to order by Alicia White, Chairperson at 10:00am.

* * * *

Approval of the November 28, 2017 Meeting Minutes

The Board members have reviewed the notes from the November 28, 2017 meeting. Motion to approve the minutes. Minutes approved.

* * * *

Agenda

On today's agenda, Bill Gruber will provide us an update on public records and record retention. We have three update submissions: Karen Traylor (Police Department), Chris Stergar (Public Works) and Brandon Bowling (Recreation).

Update on Public Records and Records Retention

Bill Gruber will provide a training on Public Records and Records Retention in 2019. It was suggested that every department send their records manager or a substitute to all of the records commission meetings since we only meet twice a year.

CITY OF SHAKER HEIGHTS

A whole new email archiving system is being instituted by the City and every department will be trained by the IT department.

Emails are to be handled just like every other public record, as told to us by the Attorney General. On transitory (records that you can delete once you determine they are not administratively necessary) records, we want to list emails. This does not mean every email or every document attached to an email (paper or electronic).

A debate of this new storage system is that all emails are being saved/backed-up in a new system called Sona Vault (you may notice in your Outlook). We will have a schedule where those emails will be purged every so often so we're not going to be able to rely on that system if you want to keep an email or a document attached to it for a longer period of time other than the purge period.

If you receive a public records request for a document that you've retained past its retention period, we have to provide information.

We also have records of former employees, electronic and paper, that we need to maintain.

Currently, if you don't archive or permanently dispose of emails, eventually your Outlook box gets too full and you receive any more. One way to open space is to save the document once and attachments won't be there. Your attachment will be a pointer to another location. Don't rely on an attachment to an email as your storage system. If a document is important, you need to keep it (downloading it, saving it to a hard drive, etc.).

We are going to encourage people to stop archiving because we now will be using Sona Vault.

When the attachment goes to the centralized database, the information will be there for the retention period.

Transitory documents may have different retention schedules. We would like to find a good policy for retention of transitory documents. Perhaps a consultant would be available to train all employees since all employees are their own records manager.

Ohio Law on Record Retention has just never caught up to technology and emails as it is unrealistic to think that we can manage emails like we used to manage paper documents.

RC-2 Update Submissions

Submissions were received by Karen Traylor (Police Department), Chris Stergar (Public Works) and Brandon Bowling (Recreation).

Bill Gruber previously reviewed the Police Department's submission and worked with John Cole and felt it is good. One suggestion is that under transitory, to add emails to be sure it is clear. Also, please list "Police Department" on the front page under unit. It is also suggested to number the pages. This can be approved with these changes. Bill Gruber moved its approval. It was seconded. Approved by Bill Gruber, Jeri Chaikin, Jeremy Bendik-Keymer and Alicia White.

Bill Gruber did not review the Public Works submission but suggests that under transitory, to add emails to be sure it is clear. Also, make sure it is signed by department manager. Chris Stergar minimized the report from the last report prepared in 2007. Bill Gruber indicated that even if you no longer have a special program but have files from previous years, they need to be maintained for a retention period. As long as every document you have, you need to make sure it is listed someplace on this RC-2. Bill Gruber moved its approval. It was seconded. Approved by Bill Gruber, Jeri Chaikin, Jeremy Bendik-Keymer and Alicia White.

Bill Gruber had a question about Recreation's submission. Many line items were combined so as not to repeat. Bill suggests that under transitory, to add emails to be sure it is clear. Also, please list "Recreation Department" on the front page under unit. It is also suggested to number the pages. It also needs to be signed by the department manager. Bill Gruber moved its approval with changes as mentioned. It was seconded. Approved by Bill Gruber, Jeri Chaikin, Jeremy Bendik-Keymer and Alicia White.

* * * *

There being no further business, the meeting was adjourned at 11:00am. The next meeting will be May 16, 2019.

Angela A. Williams, Secretary
Records Commission