

August 29, 2024


AUTHORIZE THE COMMENCEMENT OF THE PUBLIC COMMENT PERIOD FOR THE AMENDMENT AND RENAMING OF THE E-MAIL RETENTION POLICY TO THE EMAIL AND COLLABORATION APPLICATION RETENTION POLICY

THE CHIEF EXECUTIVE OFFICER RECOMMENDS:

That the Board authorize the commencement of the Public Comment Period from August 30, 2024 to September 30, 2024 for the Policy described in the disposition table below. Pursuant to Board Rule 2-6(c), the Board must authorize the commencement of the Public Comment Period.

Current Policy Section/ Current Policy Title	New Policy Section/ New Policy Title	Description of Revision/Disposition
Board Report 07-0725-PO3 Policy 203.3 E-Mail Retention	Email and Collaboration Application Retention Policy	Amend Policy 203.3 E-Mail Retention and rename to Email and Collaboration Application Retention Policy This policy has been updated in response to the biennial review. This policy was updated to include the District's utilized collaboration systems in addition to email.

Approved as to Legal Form: Initial
UB

DocuSigned by:

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Ruchi Verma
 General Counsel

Approved:

DocuSigned by:

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Pedro Martinez
 Chief Executive Officer

**AMEND E-MAIL RETENTION POLICY AND RENAME TO
EMAIL AND COLLABORATION APPLICATION RETENTION POLICY**

THE CHIEF EXECUTIVE OFFICER RECOMMENDS:

That the Chicago Board of Education ("Board") amend Board Report 07-0725-PO3, E-Mail Retention Policy and rename the policy to Email and Collaboration Application Retention Policy, as part of the Board's required biennial policy review.

PURPOSE: The purpose of this policy is to establish the retention and related requirements for ~~messages, calendars, notes and task~~ items located on the Board's E-Mail Chicago Public Schools' ("District") email and collaboration system(s) applications which include Google Email, Google Tasks, Google Group Posts, Google Chat, Google Calendar, and Google Meet ("Google Workspace Applications").

POLICY TEXT:

~~This Policy applies to all Users, except student users, of any Board E-Mail system whether owned or operated by a third party on behalf of the Board, school or unit. For purposes of this policy, User shall mean Board employees, officers, temporary employees, interns, vendors, consultants, contractors, and authorized agents and volunteers who use the Board's E-Mail system(s).~~

This Policy includes the minimum retention requirements that apply to items in specific Google Workspace Applications which are implemented by the Office of Information and Technology Services ("ITS") for the District. The minimum retention requirements for items created, received, and maintained in the Google Workspace Applications included in the policy apply throughout the District to all student and non-student users. The minimum retention requirements have been established by the Local Records Commission of Cook County ("Commission").

In accordance with the Local Records Act and the Board's Records Management and Retention Policy, the Commission establishes the record retention periods for District records based on each record's legal, fiscal, administrative, and historical value. The retention period for each record can be found in the District's records retention schedule. Non-student users, including District employees, officers, temporary employees, interns, vendors, consultants, contractors, and authorized agents and volunteers, are required to save each item outside of these Google Workplace Applications if the item qualifies as a record that must be retained for a longer time period as required in the Board's records retention schedule.

A. Mailbox Size and Management

The Board's ~~E-Mail~~ email and collaboration application system is to be used as a method of communication among employees and other authorized users for business purposes. It is not intended to be a medium in which to permanently store electronic information. Where the ~~Office of Information and Technology Services ("ITS")~~ has mailbox size or attachment restrictions in place, Users are required to manage the space in their mailbox appropriately. The retention periods described in this Policy do not guarantee that a User's mailbox size will accommodate the storage of all ~~E-Mail~~ email messages for the duration of the retention period. Therefore, Users should regularly review their messages and take timely action on long term retention needs. To stay within mailbox size limitations, ~~E-Mail~~ email messages with large attachments should be saved to offline storage or printed immediately and then deleted from the mailbox.

B. Retention Period

1. ~~E-Mail~~ Email messages and attachments, Google Group Posts, and Google Chats and Note items more than one (1) year in age will be automatically deleted by ITS ~~from a User's mailbox~~ the

~~system. Any E-Mail messages and Note items, including document attachments that need to be retained for longer than one (1) year either (a) pursuant to law, (b) an order of a court, (c) at the direction of the Board's Law Department, (d) pursuant to the Board's records retention schedule registered on file with and approved by the Local Records Commission or that have administrative or historical value must be printed out or copied to offline or local storage by the User.~~

~~ITS shall implement a system to suspend the Board's routine for destroying E Mails outlined herein when requested as part of a litigation hold by the Law Department. This suspension will be in place until ITS is directed otherwise by the Law Department.~~

~~2. Electronic Google Calendars and Task items, and Meet items located on the E-mail system email and collaboration application system (Google Workspace) will be available for a period of more than two (2) years in age will be automatically deleted by the system.~~

~~Any Google Workplace Application item, including attachments that need to be retained for longer than the minimum retention requirements of one (1) year or two (2) years either (a) pursuant to law, (b) an order of a court, (c) at the direction of the Board's Law Department, (d) pursuant to the District's records retention schedule on file with the Commission or that have administrative or historical value must be printed out or copied to offline or local storage by the User.~~

~~ITS shall implement a system to suspend the District's routine for destroying emails outlined herein when requested as part of a litigation hold by the Law Department. This suspension will be in place until ITS is directed otherwise by the Law Department.~~

C. E-Mail Email and Collaboration Applications Archive

~~E-Mail messages may be public records and therefore, beginning November 1, 2007, the Board's E-Mail system will utilize an archive system that will automatically record and retain User E-Mail messages for a period of one year. ITS will automatically destroy archived E-Mail messages more than one (1) year in age in accordance with this Policy and the Board's records retention schedule registered with and approved by the Local Records Commission. This retention period and purge process will be applied automatically to a User's archived E-Mails except when a User's E-Mails messages and resources have been quarantined for litigation purposes.~~

~~Information in the Google Workplace Applications may be public records and therefore, the District's email and collaboration application system will utilize an archive system that will automatically record and retain User Google Workplace Application items in accordance with the retention periods listed in this section. The system will automatically destroy archived Google Workplace Application items in accordance with this Policy. The retention period and purge process will be applied automatically to a User's archived Google Workplace Application items except when a User's email messages and resources have been quarantined for litigation or for other limited, justified purposes as determined by the Law Department.~~

<u>Google Workspace Application</u>	<u>Retention Policy</u>
<u>Google Email</u>	<u>1 Year</u>
<u>Google Group Post</u>	<u>1 Year</u>
<u>Google Chat</u>	<u>1 Year</u>
<u>Google Calendar</u>	<u>2 Years</u>

Google Meet

2 Years

D. ~~School-Based E-Mail Systems~~

~~Any school which elects to operate its own E-Mail system must ensure that its system complies with the requirements of this Policy and all other applicable Board Policies, guidelines and standards as a condition for continued operation.~~