

E-Mail Guidelines

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I. Introduction

This document outlines the school district's procedures and guidelines on the creation, management and retention of electronic mail (e-mail) messages. Employees must be conscious of the fact that any e-mail messages within the school district's computer equipment are subject to public inspection and that there is no right to privacy with regard to those e-mail messages.

Employees must understand that there is no means of district-wide retention of e-mails sent and received by school district employees. Since the records retention value of each e-mail message varies depending upon the message's content, it is the responsibility of each e-mail user to review and assess each e-mail message and to take appropriate action for the retention or disposal of each e-mail message.

While use of e-mail messaging by school district employees requires some review and retention practices not found in the private sector, e-mail messaging can still function as a viable, efficient means to conduct school district business. These guidelines are not intended to discourage the use of e-mail messages to conduct business, but rather to establish a framework for their proper use as a communications tool.

II. Use of E-mail Messages

Applicable School Board Policy

School Board Policy 5306 - "School and District Technology Usage" defines acceptable school and district technology usage. Section 6 of the policy defines acceptable use of computer network and online telecommunications. Section 6a defines the rules and 6b defines the Code of Ethics for computer network and online telecommunications users. All use of e-mail by school district employees must be in compliance with School Board Policy 5306.

E-mail Management and Privacy

E-mail created by school district employees while working on official business is the property of The School Board of Broward County, Florida. Never consider electronic communications to be private. Treat electronic communications the same as written hard copy communications with regard to propriety and openness. The school district reserves the right to review all electronic correspondence that is used in its systems and facilities irrespective of the e-mail system used to create or receive e-mail.

Acceptable Use of E-Mail Privileges

Acceptable uses of e-mail are activities that support the user's job assignment within the guidelines and policies of The School Board of Broward County, Florida and the Florida Department of Education, and the laws of the State of Florida. Users are encouraged to

make full use of these electronic facilities in the pursuit of their jobs and assignments provided such use complies with School Board Policy 5306.

Unacceptable Use of E-Mail Privileges

Unacceptable uses of e-mail would include:

1. Violating Section 1002.22 (3) (d), of the Florida Statutes which guarantees every student a right to privacy with respect to his or her educational records.
2. Using e-mail for illegal, inappropriate, obscene, or pornographic purposes as prohibited by School Board Policy 5306, Section 6, Acceptable Use of Computer Network and Online Telecommunications, (b) (1) (f).
3. Sending hate mail, harassment, discriminatory remarks, and other antisocial behavior as prohibited by School Board Policy 5306, Section 6, Acceptable Use of Computer Network and Online Telecommunications, (b) (1) (i).
4. Intending to spread computer viruses, damage or destroy data , infiltrate systems, damage hardware or software, or in any way degrade or disrupt the use of the network as prohibited by School Board Policy 5306, Section 6, Acceptable Use of Computer Network and Online Telecommunications, (b) (1) (j).
5. Copying commercial software or other copyright protected material in violation of copyright law as prohibited by School Board Policy 5306, Section 6, Acceptable Use of Computer Network and Online Telecommunications, (b) (1) (e).
6. Using these electronic services for financial gain or for any commercial or illegal activity as prohibited by School Board Policy 5306, Section 6, Acceptable Use of Computer Network and Online Telecommunications, (b) (1) (g).
7. Time wasting activities that do not adhere to the school district's mission, such as sending or forwarding chain letters, poems, and announcements.
8. Downloading files from unknown sources.

E-mail Account Responsibilities

Each person issued an e-mail user account is responsible at all times for proper usage. Users should never reveal their passwords to any other person.

Shared Accounts

There will be no shared accounts; all accounts will be logged-on by a single individual.

Accessing Another User's E-mail

When appropriate, primary users may delegate access to their incoming e-mail to other secondary/delegated e-mail users. This should only be done in situations where the same delegated users might also handle the primary user's paper mail.

User ID Termination

A user's ID will be revoked immediately upon that user's termination of employment with the school district or upon the termination of whatever status gave the user access to the e-mail system. The user's supervisor is responsible for: (1) notifying the assigned Network Manager of the user's termination of relationship; and (2) requesting access to the former employee's stored e-mail to review for required retention of any official record material. Upon the termination of the user's relationship with the school district, the user will no longer be able to access the system.

Effective Drafting of E-mail Messages

The following practices will increase the effectiveness of e-mail:

1. Make subject headings as descriptive as possible.
2. Restate the question or issue being addressed in a response unless the text of the original message(s) is included in the current message.
3. Include the most important fact/idea/issue first or very near the top of the message.
4. Avoid misunderstandings by keeping in mind that electronic text is devoid of any context clues that convey shades of irony, sarcasm or harmless humor.
5. Proofread and edit each message and use the system's spell check function prior to sending a message.
6. Check the facts in your message before sending it; do not spread rumors via e-mail.

Capacity and Conservation of Resources

Users must be aware of the finite capacity of the electronic office systems and must cooperate with the school district to conserve resources. The storage of e-mail documents and other items exhausts system resources, which are finite and limited. The failure to use these resources wisely could result in system outages and thus deprive others from getting their work done.

Users are expected to:

1. Open their e-mail on a regular basis (at least daily, if possible). E-mail messages and attachments that have records retention value must be retained by the e-mail user. After taking appropriate measures for record retention, the e-mail user should delete unneeded items so as not to fill up their incoming mail file (Mailbox).
2. Send e-mail to concerned parties only.
3. Use the e-mail system's "out of the office" capabilities whenever the user is out for extended periods of time. Passwords are never to be shared.

E-mail Distribution List

Distribution lists are very useful tools when sending the same message to a group of users. The following rules should be adhered to when using distribution lists:

1. Think carefully before using a large distribution list. Ask yourself, "Do all E-mail users really need to know this information?"
2. Do not use the **Return Receipt option** when sending a message to a large distribution list.
3. When printing a message sent to a distribution list for retention in a paper file, print and file the distribution list along with the e-mail message.

III. Retention and Disposal of E-Mail Messages

Public Records

In general, any information made or received pursuant to agency business is a public record regardless of its means of transmission. Records transmitted via the school district's e-mail system are thus public records, and are therefore open to public inspection under the access provision of Florida's Public Records Law.

Review Content of Each E-mail Message

E-mail messages are public records when they are created or received by the school district in the transaction of official business. The content of each e-mail message determines the applicable requirements for record retention and disposal. **It is the responsibility of the e-mail sender/recipient to review the content of each e-mail message to determine whether that message may be disposed of or must be retained.**

E-mail Retention and Disposal Requirements

Many e-mail messages that are public records may have short-lived administrative value or are transitory messages that can be deleted by both the sender and receiver immediately after the e-mail message's administrative value is lost. The record categories described below are provided to assist users in determining retention requirements.

In general, e-mail messages that pertain to a particular school district business transaction, project/case file, board action, or student/personnel issue must be retained as long as all other documentation that pertains to the same transaction/project/case/action/issue. The most current version of the *General Records Schedule for Local Government Agencies (GS1-L)* and the *General Records Schedule for Public Schools Pre-K-12, Adult & Vocational/Technical (GS7)* must be referenced to determine the specific retention requirement for e-mail messages that fall under this category. The GS1-L and GS7 publications may be found at the State of Florida website http://dlis.dos.state.fl.us/recordsmgmt/gen_records_Schedules.cfm.

The retention and disposal requirements for the various classes of e-mail messages are set forth as follows:

- **Setting Policy.** Any e-mail message that sets school district policy. *Records Disposal:* The sender and receiver should save this e-mail to a disk or retain a hard copy for a period of 2 years after superseded or becoming obsolete. Disposal authorization for these records is provided on a Records Disposition Request form under GS1-L item 186a Directives/Policies/Procedures that is sent to every school and department each year. All duplicate copies may be deleted and disposed of in a timely manner once they no longer serve any administrative value, become obsolete or are superseded.
- **Establishing Guidelines or Procedures.** Any e-mail message that establishes guidelines or procedures to be followed. *Records Disposal:* The sender and receiver should save this e-mail to a disk or retain a hard copy for a period of 2 years after superseded or becoming obsolete. Disposal authorization for these records is provided on a Records Disposition Request form under GS1-L item 186a Directives/Policies/Procedures that is sent to every school and department each year. All duplicate copies may be deleted and disposed of in a timely manner once they no longer serve any administrative value, become obsolete or are superseded.
- **Certifying a Transaction.** Any e-mail transaction that certifies a transaction on behalf of the school district. *Records Disposal:* The sender and receiver should save this e-mail to a disk or retain a hard copy for a period of 3 fiscal years if it is routine correspondence. Disposal authorization for these records is provided on a Records Disposition Request form under GS1-L item 17a Correspondence & Memoranda: Administrative. If it is not routine correspondence, retain it for as long as the item it relates to. All duplicate copies may be deleted and disposed of in a timely manner once they no longer have any administrative value, become obsolete or are superseded. If the e-mail message originated from a sender outside of the school district, the recipient should save this e-mail message to a disk or retain a hard copy and all other copies may be deleted and disposed of in a timely manner once they no longer have any administrative value, become obsolete or are superseded.
- **E-Mail as a Receipt.** Any e-mail message that is intended to serve as a receipt. *Records Disposal:* The sender and receiver should save this e-mail to a disk or retain a hard copy for a period of one (1) fiscal year. Disposal authorization for these records is provided on a Records Disposition Request form under GS1-L item 47a Mail: Registered and Certified Receipts that is sent to every school and department each year. All duplicate copies may be deleted and disposed of once they no longer have any administrative value, become obsolete or are superseded. If the e-mail message originated from a sender outside of the school district, the recipient should save this e-mail message to a disk or retain a hard copy and all other copies may be deleted and disposed of in a timely manner once they no longer have any administrative value, become obsolete or are superseded.

- **Perpetuating or Formalizing Information.** Any e-mail message that communicates information having an administrative value beyond the point of its communication OR that is intended to perpetuate or formalize knowledge. *Records Disposal: The sender and receiver should save this e-mail message to a disk or retain a hard copy for 3 fiscal years if it is routine correspondence. Disposal authorization for these records is provided on a Records Disposition Request form under GS1-L item 17a Correspondence & Memoranda: Administrative. If it is not routine correspondence, retain it for as long as the item it relates to. All other copies may be deleted and disposed of in a timely manner once they no longer have any administrative value, become obsolete or are superseded. If the e-mail message originated from a sender outside of the school district, the recipient should save this e-mail message to a disk or retain a hard copy and all other copies may be deleted and disposed of in a timely manner once they no longer have any administrative value, become obsolete or are superseded.*

- **Transitory Messages.** These are e-mail messages have short-lived administrative value and that lose that value upon receipt of the communication. These e-mail messages are designed for the informal communication of information and are not designed to formalize or perpetuate information. These e-mail messages might be compared to communication taking place during a telephone conversation, verbal communications in an office hallway, telephone voice mail or most written telephone messages. Examples include internal office announcements such as:

“John Doe called, please call back” (all phone call logs); or
“Is this afternoon’s meeting still on?” or
“Tomorrow’s staff meeting location has been changed to the KCW 10th
Floor conference room.”

Records Disposal: These should be deleted and disposed of in a timely manner without the need for any records retention once they no longer have any administrative value, become obsolete or are superseded.

- **Non-Business Communications.** Any e-mail not received or created in the course of school district business. Internal and external personal communications or announcements of a non-business nature and personal notes intended for one’s personal use do not need to be retained as public records. These are messages that do not support business purposes. Please note that limits on personal use of e-mail have been established by the school district and are discussed within this memorandum. The following examples are e-mail messages that do not pertain to the conduct of school district business and may be deleted at any time:

Lost jewelry/keys notices;
Birth/death/funeral announcements; and
Party announcements (baby shower, wedding shower, retirement, etc.)

Records Disposal: These should be deleted and disposed of in a timely manner without the need for any records retention once they no longer have any administrative value, become obsolete or are superseded.

- **Uncirculated Materials.** E-mail messages consisting of uncirculated materials that are (1) merely preliminary or precursors to future documents and (2) which are not in and of themselves intended to serve as final evidence of the knowledge to be recorded must be retained until they no longer have any administrative value, become obsolete or are superseded. *Records Disposal: These should be deleted and disposed of in a timely manner without the need for any records retention once they no longer have any administrative value, become obsolete or are superseded. The retention requirement is provided under GS1-L item 242a Drafts and Working Papers.*

Compliance with Public Records Requests

E-mail messages within the school district's computers and computer system are public records, open to public inspection according to provisions in Chapter 119, Florida Statutes. Depending on the content and topic of a particular message, it may or may not be exempt from public inspection under Florida's Public Records Law. While exempt material can later be redacted from e-mail messages in response to a public records request, it is recommended that each user avoid inclusion of exempt information within e-mail messages.

Email Address Disclaimer

Under the Public Records Law of the State of Florida, email addresses are public records. Please modify your CAB signature preference to include the following disclaimer:

Under Florida law, e-mail addresses are public records. Your e-mail address and the contents of any e-mail sent to the sender of this communication will be released in response to any request for public record, except as excluded by F.S. 119.071, 1002.22(3)(d) [student records], or any other law of the State of Florida. If you do not want your e-mail address to be released as part of any public records request, do not send e-mail to this address, rather contact this office by phone or in writing.

Important "Do's and Don'ts"

DO:

- Be familiar with Section 6 of School Board Policy 5306 (School and District Technology Usage).
- Be aware that e-mail are records and subject to disclosure according to the Public Records Law and are subject to subpoena.
- Review each e-mail that you send or receive to determine its record retention value and take action to retain a record copy of e-mail messages when appropriate under state records retention guidelines.

DON'T:

- Don't include any confidential information in e-mail messages (including local e-mail and Internet mail).
- Don't assume that paper documents are the only type of communications subject to records retention/disposal requirements and public records requirements. Electronic records and e-mail are also subject to these requirements.
- Don't assume that your e-mail messages are being retained and preserved by the e-mail system or off-site by the school district.
- Don't put anything in an e-mail message that you wouldn't normally include in a paper document.
- Don't download files from unknown sources.