



POLICY & PROCEDURE

Use of Text and Instant Messaging for City Business			Category: 0800 IT/Records Management
			Number: 800-04
			Classification: Internal
Effective Date: 6/27/2024	Supersedes: Policy #8749 2/28/2017	Policy Originator: City Clerk	Approved By: Bristol Ellington Bristol Ellington, City Manager

1.0 PURPOSE

The City of Shoreline recognizes text messaging and instant messaging as an effective communication tool for City Employees to send and receive transitory messages to facilitate City business in a convenient and timely manner. The purpose of this policy is to establish rules on the appropriate use and retention of text messages (text) and instant messages (IM).

2.0 DEFINITIONS

2.1 “Public Record” is information in any format, that has been made by or received by the City in connection with the transaction of City business.

2.2 “City business” relates to the conduct or the performance of the City of Shoreline.

2.3 “Transitory records” are public records that are typically of short-term, temporary informational use. The information is not used as the basis of a decision or action and is not the only evidence of a decision or action being made. See Appendix A for examples of transitory messages.

2.4 “Text messaging” is sending or receiving SMS, MMS, or iMessages. SMS is a service that allows for short text messages to be sent from one phone to another. MMS is a system that enables devices to send and receive pictures and sound clips as well as text. iMessage is an instant messenger service developed by Apple Inc. that allows texts, documents, photos, videos, locations, contact information and group messages between Apple devices.

2.5 “Instant Messages” are messages sent via the Internet that appear on the recipient's screen as soon as it is transmitted. For the purposes of this Policy, “chats” sent through online meeting and collaboration platform, or “posts” on social media are considered IM. Microsoft Teams is one of these platforms.

2.6 “Teams Chats” are instant messages sent and received through the Chat button in the Microsoft Team application.

3.0 DEPARTMENTS AFFECTED

This policy shall apply to all City employees, elected and appointed officials, and volunteers. These groups will be identified collectively as “Employees”.

4.0 POLICY

4.1 Text and IM are a public record. Any text or IM that has been sent or received by Employees in connection with the transaction of City business is a public record. The retention period for public records depends on the function and content of the record, not its format or method of transmission. How long text and IM need to be kept depends on the business, legal, and accountability needs to retain the evidence of the transaction that is documented within it.

Pursuant to Policy 800-01, the City of Shoreline follows the retention periods set out in the Washington State Archives Records Retention Schedules.

4.2 Appropriate Use of Text and IM. Employees are only permitted to send and receive transitory messages related to City business over text and IM. See examples of transitory messages in **Appendix A**. No substantive City business shall be conducted over text or IM.

The City encourages Employees to use City issued cell phones when sending text messages, or to log into Microsoft Teams (using their City network credentials) to send messages on a personal device. The City prohibits IM on applications that are not administered by the City. Any text messages sent on a personal device are subject to Public Records Request procedures in Section 4.4 of this Policy.

4.3 Retention of Text and IM.

To comply with records management requirements in RCW 40.14 and public disclosure mandates in RCW 42.56, text and IM related to City business shall be managed as follows:

Text Messages	Instant Messages
<p>Employee’s texts are maintained on the device they are sent/received. All Employees should delete transitory text messages from their device as soon as they are no longer needed.</p> <p>The City uses third-party archive software to retain text messages of select City Employees for a period of seven (7) years.</p>	<p>IM’s are maintained in the application they are sent/received.</p> <p>Teams Chats are retained for 24 hours and then automatically purged.</p> <p>Employees should delete all other transitory IM’s as soon as they are no longer needed.</p>

If a text or IM needs to be retained pursuant to a retention schedule, Employees must transfer the messages to the City’s email system or memorialize/capture the

information in a more formalized record in which is retained in accordance with the approved minimum retention period.

4.4 Responding to Public Records Requests

Text and IM are subject to public disclosure under the Public Records Act. The City Clerk's Office is only responsible for searching archived text of Employees whose text messages are archived. Therefore, if text or IM exist in applications outside of the City's archive, it is the employee's responsibility to search for, identify and produce the records.

If text or IM public records exist on personal devices, Employees may be required to provide a declaration establishing that the City conducted an adequate search of a personal device.

4.5 Exceptions to Policy

Sending non-transitory messages is allowed to relay important and time sensitive information related to an emergency when responding to the emergency.

Appendix A – Examples of Transitory Messages

- To-do lists.
- Workflow notifications/escalations.
- Working/rough notes.
- Records where the evidence of the business transaction has been documented as part of another more formalized record of the agency which is retained in accordance with the current approved minimum retention period.
- Materials gathered from outside sources for reference/reading use which are not evidence of the agency’s business transactions.
- Scheduling of appointments/meetings.
- Sending photo or document if it is saved in a location in accordance with the approved minimum retention period.

Allowed to Text	Not Allowed to Text
I’ll be late to the meeting.	I’ll be late, but I think we should appoint “_____” to the “XYZ” committee.
I just sent you an email.	We need a decision on the preferred alternative for this “_____” public contract. What do you think?
Could you please call me?	Use the following language in the press release “Announcing...”
The Mayor is trying to get in touch with you.	The Mayor wants to know your thoughts on city council proposal for “_____”.
Can you pull the elected/appointed official out of this meeting?	We need to schedule a closed door meeting with So and So Official and the other board members for later today.
Can you cover me in today’s meeting?	We need to meet with all the stake holders about this issue.
I emailed you a draft, please review.	Use this language in the staff report: “_____”
We’re out of paper clips.	Office Depot has a best price on paper clips. I’ll send you the link so you can buy some for us.
Please review the list of trees to be removed on the SharePoint site.	Please remove the hazardous tree at _____ park.