

Public Records Committee (PRC)

Via Microsoft Teams

April 16, 2024

3:30 – 4:15 pm

Attendance: All attendees joined the meeting remotely. Below are the attendees of the meeting:

Organization	Names
4Culture	Erica Maniez
Adult & Juvenile Detention (DAJD)	Andrea Williams
Assessor's Office (DOA)	
Community & Human Services (DCHS)	Chelsea Walch
District Court (KCDC)	
Elections	Jackie Adams
Executive Services (DES)	Cindy Cawaling
Executive Services: FMD (Facilities)	Elizabeth Thelen
Executive Services: Records and Licensing (DES RALS)	Norm Alberg
Executive Services: Records and Licensing, Archives, Records Management, & Mail Services (DES RALS ARMMS)	Cynthia Hernandez, Ellie Rhodes, Hannah Soukup, Valerie Vega, Ryan Wadleigh
Executive Services: Office of Risk Management Services (DES ORMS)	Stephanie Santos, Kaitlyn Wiggins
Human Resources (DHR)	Anna Heinrichs
Information Technology (KCIT)	Megan Mason, Tim Morrow, Katie Suvlu, Grace Preyapongpisan
Judicial Administration (DJA)	Danielle Anderson
King County Council (KCC)	Johanna Loomis
Executive Office (KCEO)	Ames Kessler
Local Services (DLS)	Greg Felton, Craig McMurdo
Metro Transit (MTD)	Caroline Darrow
Natural Resources & Parks (DNRP)	Sara Fitzgibbons
Prosecuting Attorney (PAO)	
Public Defense (DPD)	Mon-Cheri Barnes
Public Health (DPH)	
Sheriff's Office (KCSO)	Kimberly Petty
Superior Court (KCSC)	

1. Introductions

Norm Alberg called the meeting to order at 3:33 pm. Katie Suvlu is attending to discuss Public Folders.

2. Approval of Minutes

Norm called for a motion to approve the minutes from March 19, 2024. Anna Heinrichs introduced the motion and Sara Fitzgibbons seconded the motion. The minutes were unanimously approved.

3. Updates from:

- Public Records Program (PRP) – The in person summit will be on April 30th. Reach out to Stephanie Santos for an invitation.
- KCRIGG – The group continues to discuss concerns about AI, holds, database records, and transcription. The database discussion is ongoing and open. There are different perspectives on AI based on the issues KCRIGG members represent (records, security, disclosure, etc.). Standardizing holds in Purview should include notifications for holds placed on M365 accounts using Purview.
- Proviso Response – The kickoff meeting with the consultant was last week and it went well. The needed information has been gathered and given to the consultant. They estimated it would take about two months to review the information and create recommendations. The next meeting with them will be next week.
- KCIT – The new version of Outlook was released and people were able to switch to it. However, the version did not match up well to county work. KCIT has since disabled the new Outlook and shared instructions for doing so with the separately elected IT departments. This will be revisited early next year. New Teams has rolled out but Classic Teams is still available until June. Submit a ticket to KCIT for issues with new Teams. Many of these issues have been resolved by logging out and in or for KCIT to clear the cache.

4. Public Folders

Katie Suvlu gave a presentation on the public folders status. Public folders are folders in a shared location in Outlook. In 2018 there was a migration of mailboxes to Office 365. At that time it was decided public folders were out of scope and would be addressed separately; addressing the public folders was pushed back due to COVID-19. Now these records are not being managed, they are not discoverable, and they are difficult to access. Microsoft will also stop supporting public folders.

The goal of the project will be to 1) clean the public folders by June 2024 and 2) migrate the remaining content to a modern solution by October 2024, such as SharePoint. Cheryl Anne Gunderson will assist in identifying the best modern solution. Public folder leads will be identified to manage this. These leads will be identified with assistance from the Customer Success Managers in KCIT.

The majority of the records are expected to be transitory. Ownership will need to be determined for many records because they are, or appear to be, orphaned. Not all departments have public folders and the folders may not align with existing county structure. The oldest folder found was from 1999. There is no reliable last access date for the folders.

Katie gave a quick overview/demo of how to access and see the public folders. To access the folders, go to “new apps” from Outlook. Put in a ticket with KCIT if you do not have this feature. Public folders are not accessible in new Outlook.

Ellie will write basic guidance for this project, which will take into consideration the difficulty in managing records when knowing nothing about them. When determining the appropriate

retention schedule consider what the longest retention schedule you have is, and also what your risk appetite is.

The timeline may be challenging for some, such as Elections. Contact Katie to discuss the deadline.

There was a robust discussion about this topic, with feedback and comments from Danielle Anderson, Anna Heinrichs, Hannah Soukup, and others.

5. ARMMS Update

- RMP – April is Records Management Month. All are encouraged to celebrate. There have been records games posted on the RM Network Teams site. The next RM Network meeting will be on 5/8/24 and invitations will be sent soon. The RMP is now receiving legal hold notices from the PAO and they will work to reconcile these with the PRC's [legal hold master list](#). To know the list's last updated date, look at the dates entered or the file metadata. Per [legal hold policy](#) this is still the ARO's responsibility. Legal holds need to be issued from the PAO, not from others who are notified, such as the RMP or Laserfiche. This will only be for legal holds and not other types of retention holds, such as public records requests. Executive Branch Public Records Officers PROs should not be issuing data holds through Microsoft eDiscovery. The next ARO open house will be next week on 4/25/24.
- Archives Program Update – Recruitment for an Archives Specialist is ongoing. Phone interviews are starting next week and Hannah anticipates being fully staffed by mid May. The Digital Asset Management (DAM) has been drafted and shared. The archives are strategizing with KC RIGG to plan for a Trusted Digital Repository (TDR).
- The Content Manager upgrade went smoothly. Contact the Records Management Program RMP for assistance or guidance with the upgrade or other Content Manager issues.
 - Power BI – Valerie gave a demo of the new dashboard, which will replace the current Agency Dashboard and Advanced Agency dashboard on the RM Network Teams site and PRC Teams site, respectively.

6. Good of the Order and Summarize Take-away Messages

- The PRP Summit will be on April 30. Reach out to Stephanie for an invite.
- The Proviso is ongoing and the consultant is working on it.
- New Outlook will be revisited in Jan 2025.
- Submit a ticket for issues with new Teams or log in and out. Classic Teams will be unavailable around June of this year.
- Public Folders will be migrated to modern solutions by October 2024. Watch out for questions from public folders leads about managing these records. Access and knowledge about these public folders is limited. Submit a ticket to get access. Ellie will write and share guidance. Contact Katie to discuss the deadline. Katie is invited to the next meeting.
- The legal hold list is still the ARO responsibility, but the RMP is working to improve the process for holding records.
- The next ARO open house is next week on 4/25.
- The Archives are anticipating being fully staffed next month.
- The Archives are working on the DAM and TDR.
- Send feedback on the dashboard to Ryan or Valerie.
- The next PRC meeting is May 21.

The meeting adjourned at 4:24 p.m.