

Public Records Committee (PRC)

Via Microsoft Teams

June 18, 2024

3:30 – 4:30 pm

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

Organization	Names
4Culture	
Adult & Juvenile Detention (DAJD)	
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)	
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, Jackie Stewart
Human Resources (DHR)	Anna Heinrichs
Information Technology (KCIT)	Megan Mason, Grace Preyapongpisan
Judicial Administration (DJA)	Danielle Anderson
King County Council (KCC)	Johanna Loomis
Executive Office (KCEO)	
Local Services (DLS)	Greg Felton
Metro Transit (MTD)	Alex Conn, Mirla Santiago
Natural Resources & Parks (DNRP)	Sara Fitzgibbons
Prosecuting Attorney (PAO)	
Public Defense (DPD)	Mon-Cheri Barnes
Public Health (DPH)	Jonathan Bibler, Tyler Entriiken
Sheriff's Office (KCSO)	Kimberly Petty
Superior Court (KCSC)	

1. Introductions

Norm Alberg called the meeting to order at 3:31 pm.

2. Approval of Minutes

Norm called for a motion to approve the minutes from May 21, 2024. Hannah Soukup introduced the motion and Jonathan Bibler seconded the motion. The minutes were unanimously approved.

3. Updates from:

- Public Records Program (PRP) – In response to the Cousins court decision it is now easier to close requests. Contact the PRP with questions.

- KCRIGG –
 - a. The AI workgroup has drafted guidance for AI, including principles, best practices, and use considerations. This is getting approval through Megan Clarke. There will be a rolling set of communications for implementation. The Records Management Program (RMP) will consider additional guidance for AI records after rollout.
 - b. KCRIGG continues to address Purview placing holds on employee accounts. Sara Fitzgibbons has examples of transitory chats from 2023 showing up in searches, presumably because there is a hold on a user's account. She was unable to confirm this between KCIT and DHR; Grace Preyapongpisan will follow up on holes in this process. The PAO is the only one allowed to put records on legal hold and Sarah Cranfill is a good contact for confirming holds. However, holds in the M365 environment are not always legal holds, even if the function is named 'Legal Hold' by Microsoft. Stephanie Santos and Anna Heinrichs are invited to KCRIGG to contribute to this ongoing conversation.
 - c. Database records guidance is published online.
 - d. The transcription feature in MS Teams is turned off for all in the county except the auditor. Discussions on managing these transcription records is ongoing. They are not transitory, per the state guidance. Others in the county have found workarounds to create transcripts. The RMP needs more information before providing guidance.

- Proviso Response – Cynthia Hernandez and Kelsey Urban will discuss the draft guidance from the consultant on 6/26. See prior minutes from this calendar year for details on the proviso.

- KCIT – In addition to the notes above on AI, Monisha Harrell will cosponsor the generative AI guidance, including software approval and use case approval. Finalization is in progress. Pre-rollout communications will go out in August and rollout is anticipated in September. Tim Morrow gave an update on the public folders project before the meeting. Public folder leads (many of whom are in PRC) have all been identified and attended training to understand the ask, as well as the methods for moving through the work. KCIT has a Power BI dashboard to reflect overall migration status, which is progressing well. The next check-in meeting with the leads on 6/25 will be a check-and-adjust moment for the effort overall.

4. Public Records Program Ordinance

An ordinance draft was shared with all before the meeting. Since January, the Public Records Program has been working on a change that would allow public records officers to process multiple similar open requests from the same requestor. The county annually receives ~14,000 requests a year and there is an increasing trend of people using the Public Records Act to show dissatisfaction with the government. This leads to frustration, burnout, and makes it difficult to give requestors equal service. In March, the PRP held a workshop that addressed these issues and proposed changes. This ordinance would make workloads more manageable, let staff feel more supported, and decrease the chance of mistakes. Please send any feedback on the ordinance to Kaitlyn Wiggins by 6/25 so it can get to the Executive Office and Council by August. Stephanie is interested knowing if the language is accessible and would appreciate feedback

from non-public records officers. The most substantial changes are in subsection c of the ordinance. Kudos to Kaitlyn for this work.

5. Legal Hold Process Update

Ellie and Ryan gave an update on the legal hold process in Content Manager. This is unrelated to the M365 hold issues discussed above. The RMP will now receive legal hold updates directly from the PAO. They will then add the hold to Content Manager, which will create an official legal hold list that can be viewed in a Power BI dashboard on the PRC Teams site. Staff can then directly add a container to a hold in Content Manager; holds cannot be placed on individual records. There is a robust audit trail to show user activities with holds in Content Manager. Ryan gave a demo on how to do this. Prior, the ARO was responsible for adding holds to the legal hold list (which still exists) and staff needed to fill out a form so the RMP could add records to holds for them. There were communication gaps, challenges, and inconsistencies in this process. AROs are still responsible for monitoring the list and informing the Records Management Program if they find any hold missing, even if they are not responsible for updating it. The RMP will also be notified when a hold is lifted. Anna Heinrichs asked about how the RMP would get a list of employees, which is not always easy to get from the PAO. DHR can assist with this. Ryan said at this point the RMP does not need anything other than the language in the hold and the issue can be addressed organically.

6. ARMMS Update

- RMP – The next ARO open house is on 6/26 and will focus on digitization. Contact the RMP for an invitation if you did not get one. The state's CORE retention schedule, which the county is required to comply with, will undergo a major update. Details and changes are unknown at this point, but it is expected to be a notable project for the program. Ellie may reach out to let people know about relevant changes.
- Archives Program Updates – The archives are fully staffed. The new Archives Specialist, Shaye Anis, worked with the program in February when he was a MLIS student. He has a background in ESJ related topics, records, reference, and patron services.
- Annual Digital communications survey Digital Comms Survey is now closed. Thanks to all who responded. This information will be integrated to the annual PRC report. The final report will also include JLARC activities and PRC activities (including KCRIGG). A draft will go out to voting PRC members for approval next week. There will be about a week to review the report before voting in the first week of July.

7. Good of the Order and Summarize Take-away Messages access.

- Shannon Smith announced is leaving King County. Grace will be the PRC Rep and the KCRIGG Co-Sponsor. Big thanks to Shannon for her leadership! And welcome to these roles, Grace.
- Contact PRP with questions on the Cousins decision.
- AI guidance is in process. Rollout and communications are anticipated circa September after pre rollout in August.
- The feature named Legal Hold in Microsoft is used for all types of holds and do not necessarily refer to legal holds. Purview holds are likely why older chats are still available, but it is difficult to confirm. Grace will follow up with Sara Fitzgibbons.
- Transcription records of meetings are not transitory. There may be transcript guidance from the RMP after more information is gathered.
- The public folders project is ongoing.

- Grace will check if MS Recall will be evaluated as part of the AI guidance.
- Send feedback to Kaitlyn Wiggins by 6/25 on the ordinance for grouping public records requests, including feedback on accessibility for the general public. Kudos to Kaitlyn for this work.
- The legal holds process in Content Manager was streamlined so the RMP will add and lift legal holds. Staff can now directly add holds to records Content Manager. Contact the RMP with concerns or for more discussion.
- The ARO open house will be next week on 6/26.
- The CORE retention schedule will undergo a major update; specific changes are unknown.
- The Archives are fully staffed.
- Watch out for communications on the PRC annual report and be ready to vote on it by ~7/5.

The meeting adjourned at 4:20 p.m.