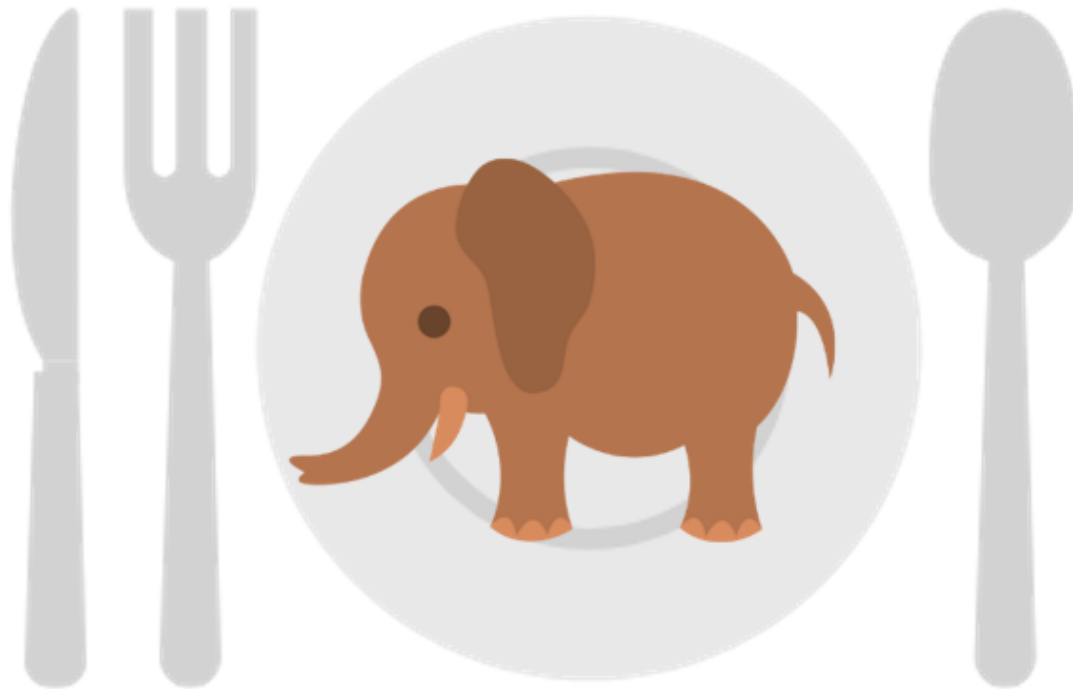


Eating Elephants

A fine dining guide explaining how to chew through the toughest public records requests.

Developed and Presented by Krystal Townsend



CITY OF KENNEWICK PUBLIC RECORDS UNIT

City Clerk Terri Wright, MMC, CPRO

Public Records Specialist Jennifer Hansen, CPRO

Police Support Specialist Cindy Powell

Public Records Officer Krystal Townsend, CMC, CPRO

Police Records Bureau Supervisor Mickie Marty

MENU

How Do You Eat an Elephant?

Elephants are Tough

Confirm the Order

Elephant Preserves

Expired Elephants

Menu, Please!

Your Order's Almost Ready

Mind Your Table Manners

Who Is Invited?

1 Star Review

Party of One?

Why Did I Get Invited

Wow! That's a Big Elephant!

Portion Control

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Airplane Forks

Don't Stuff Your Face

Keep Your Food Separated

Have an Elephant Slushy

Keep a Food Journal

Where Are We Dining?

Bus the Table

Speak to a Manager

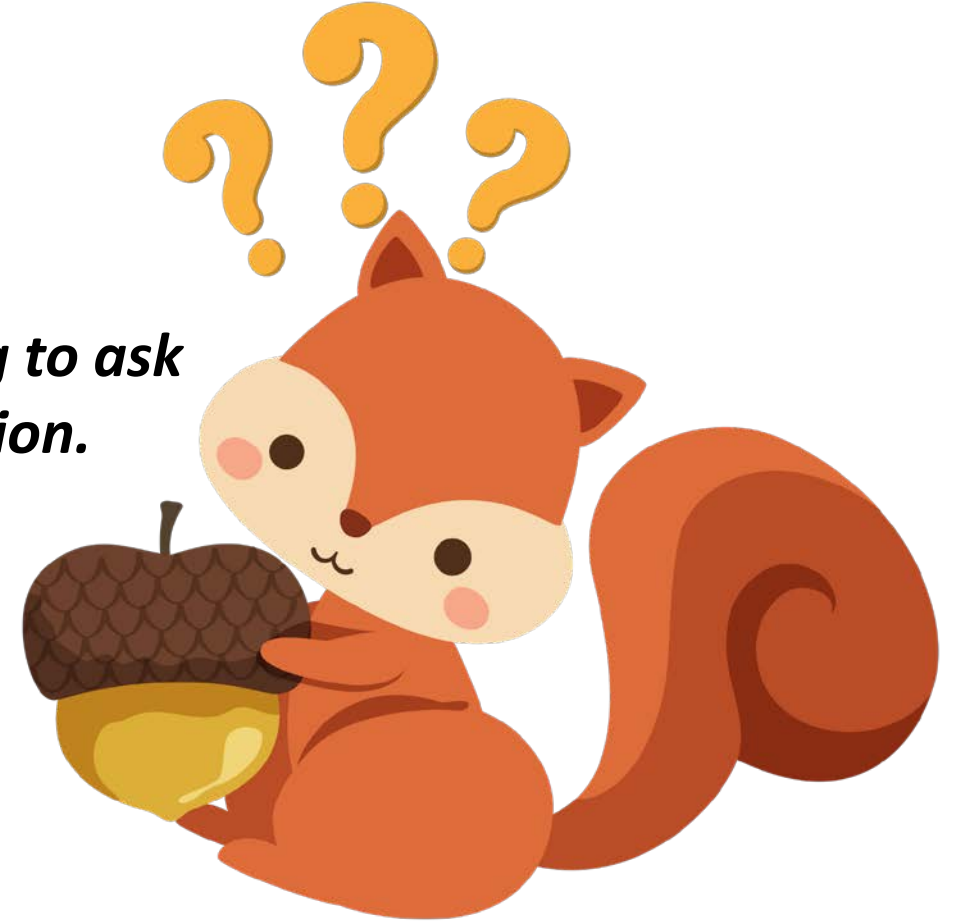
Eating Elephants Introduction

This presentation utilizes an elephant metaphor because I realize complex public records requests can seem overwhelming and gigantic at first glance. My goal is to validate those feelings and to provide you with tools to support the people you work alongside.

If you find yourself face to face with an elephant, it's my hope the information shared today will empower you to confidently chow down!

Now, Where Did I Put That Elephant?

As a lifelong Squirrel Syndrome sufferer, I'm going to ask that questions wait until the end of the presentation.



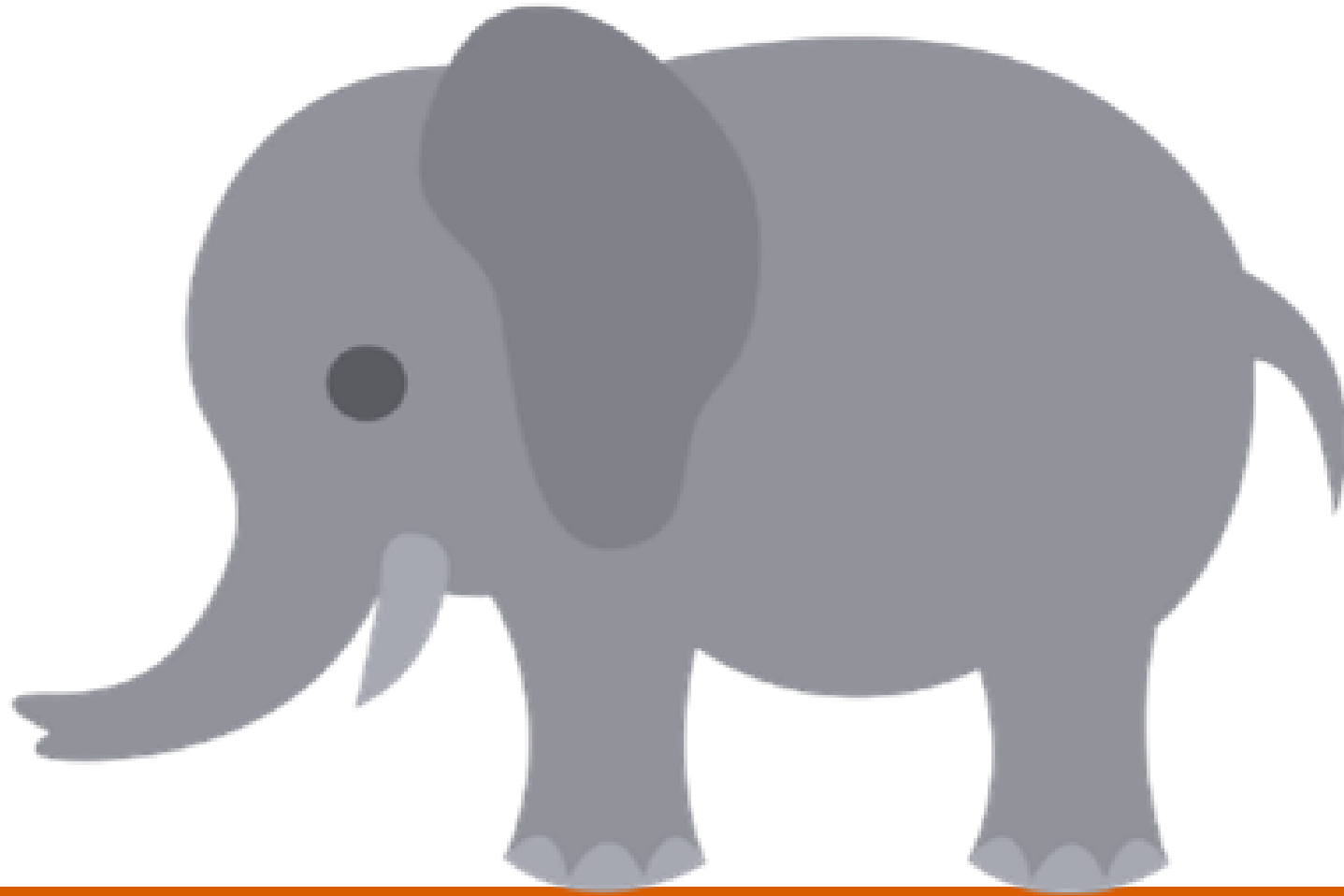
Now, Where Did I Put That Elephant?

This presentation covers my entire tough request philosophy plus my tips and tricks to tackle them. You need to see the whole elephant enchilada before we deep dive into questions.

Today's session is advanced material --- we are not covering the basics of the PRA.

I've put quite a bit of text in the slides and the notes – this is so that you can go back later and read through the materials at your leisure. Today I'm highlighting the content. My plan is to move through these slides at a quick clip so that we can go back and revisit anything you want further explained.

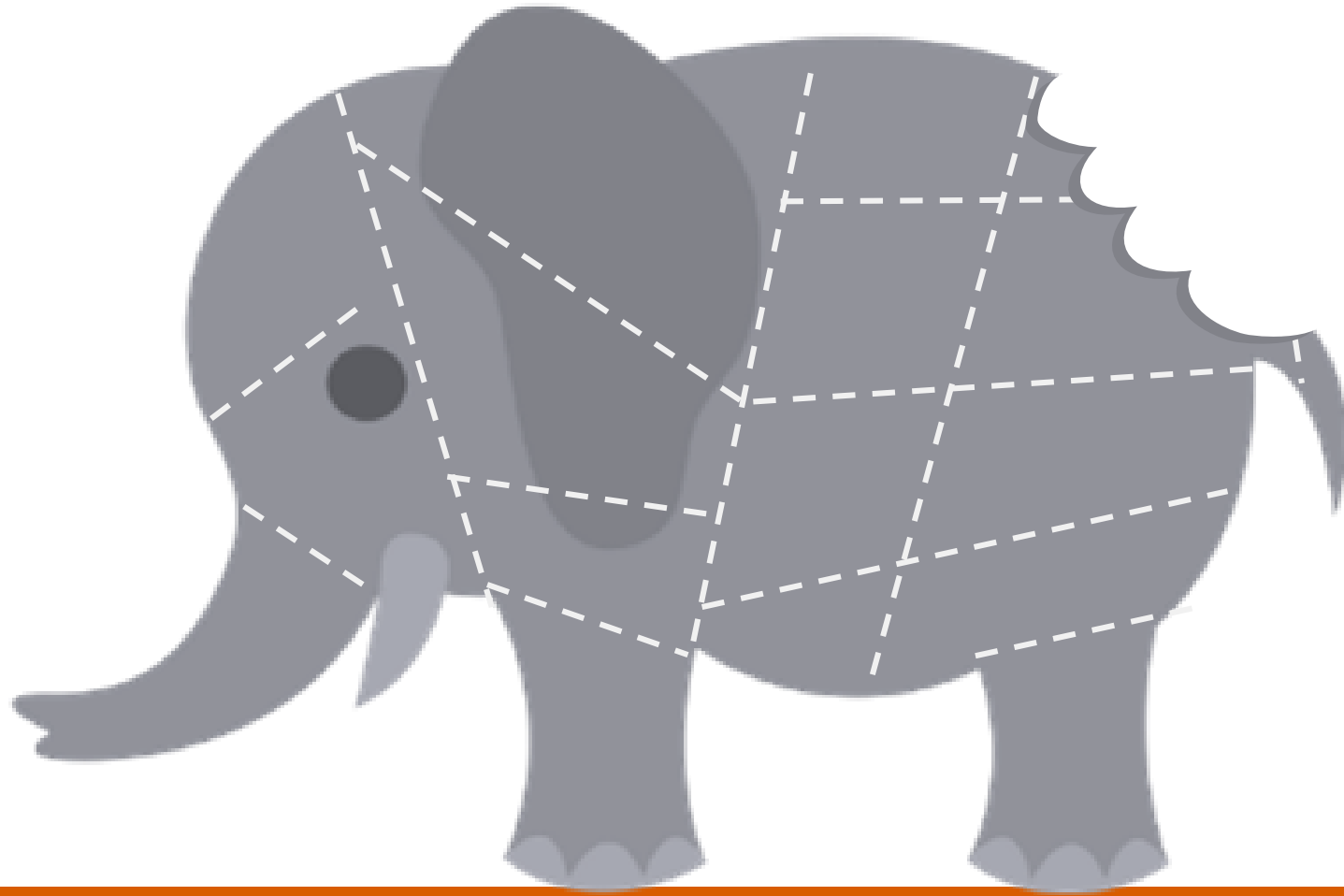
How Do You Eat an Elephant?



How Do You Eat an Elephant?

Oh! There's my elephant. Now that we're back on track . . . Does anyone know how you eat an elephant?

One bite at a time!



One bite at a time!

. . . here's the obvious punchline!

However, the adage is true. It's best to tackle big tasks one piece (or bite) at a time.

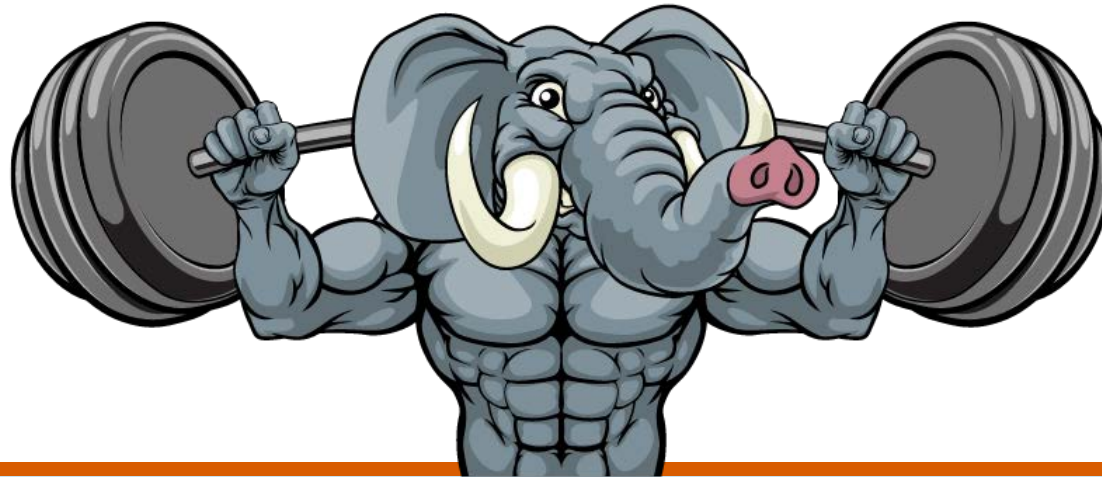
Elephants are Tough

I know you're facing big obstacles: Pre-existing workloads, limited staffing, age of records requested, confusing terminology, large scopes, multiple staff and divisions, unknown locations to search, large volumes of records to transmit.

REMEMBER: THE REQUESTOR IS OUR CUSTOMER NOT OUR OPPONENT

We are tasked with providing our customer with the fullest assistance possible.

TIP: Pretend your customer is your supervisor and tomorrow is your annual review.



Elephants are Tough

And, there's no denying that this job is tough. However, providing access to records is as much a part of an agency's responsibility as it is to provide police protection, fire suppression, building permits, utilities, etc.

In the public sector, we have **a duty** to fully respond to public records requests.

As a public records officer, your role is to help lead your team to successfully satisfy public records requests without PRA violations.

Confirm the Order

ONE ELEPHANT COMING UP! WE'LL HAVE IT TO YOU IN SIX SHORT MONTHS . . .



Did your customer expect a same-day search and you've just sent them a letter estimating it will take months?

Reach out and introduce yourself as their public records advocate. Confirm they meant to order an elephant rather than a cupcake.

Then, make an effort to work together to craft an efficient, succinct request.

An orange speech bubble pointing towards the left. Inside the bubble, the text "THIS?" is written in a white, outlined, sans-serif font. Below the text is a detailed illustration of a small grey elephant with pink ears and a trunk.



Confirm the Order

With your best customer service cap firmly in place, reach out to the customer and get them up to speed on the impact of their request. Oftentimes, requestors are confused about how to make a request and play it safe by casting a wide net.

Our customers seldom have the same level of training that we do. They simply don't realize that an "any and all" request means we must provide every single responsive record.

Put yourself in your requestor's shoes. Do they feel like they had to go into battle when submitting the request? Are you able to build trust with the requestor?

Sometimes we can't collaborate successfully but that doesn't mean we shouldn't try.

Elephant Preserves

PREVENT ELEPHANT EXTINCTION

Auto-Expiry

- Email.
- Recordings.
- Web-Based Content.
- Digital Records Storage (OnBase, Laserfische, etc.).

Retiring/Departing Employees.

Planned Records Destruction/Migration.

Hidden Records.



DO NOT DESTROY RESPONSIVE RECORDS EVEN IF RETENTION HAS BEEN MET!

Elephant Preserves

Elephants can take months and even years to hunt down and eat. Your first step is to preserve records from destruction during the dining experience.

Meet with your IT team ASAP.

- Turn off auto-expiry on email accounts.
- Send a notice to all staff to preserve and protect every record relating to the subject.
- Migrate sensitive/vulnerable records to a secure location.
- Grab tapes/videos that auto replace/erase.

Meet with retiring or departing staff to determine where records may exist.

If you don't have mechanisms in place to halt auto records destruction, get it in place now.

Expired Elephants

DON'T FORGET TO DIG UP THE PREHISTORIC STUFF

With a mammoth request, consider how things used to be done.

You may need to dig into the musty, crusty and dusty places looking for fossils.



Purge records in compliance with the records retention schedule to avoid mystery Tupperware contents.

Menu, Please!

UPDATE YOUR FEE SCHEDULE

Agencies have no duty to further respond to requests when a customer fails to claim records. RCW 42.56.520(3)(b)

- Inspecting records is **FREE**.
- Copies = **Convenience**.
- Convenience = **Actual Cost**.
- Actual Cost = **Budget**.
- **Deposit** = 10% of anticipated total. RCW 42.56.120(4)

2021 JLARC Public Records Full Dataset 09/20/2022

Estimated Cost of Fulfilling Records Requests: **\$99,941,236**

Recovered Expenses **\$194,984**

- Zero: **92**
- Under \$100: **33**
- Under \$1,000: **51**

82% OF AGENCIES RECOVERED LESS THAN \$1,000!

Daily Menu

PRICES REIMBURSE TAXPAYERS
FOR THE ACTUAL COST OF COOKING COPIES.



Electronic Delivery \$6.27



Each Electronic File \$.62



Each Gigabyte \$.10



Scanning Per Hour \$36.50



Review In Person

Mon - Thu 8:30am - 4:00pm

Reservations Required



Our Chef Recommends

OUR COMPLIMENTARY SELF-SERVE RECORDS
~ SERVED HOT & FRESH ONLINE 24/7!

Menu, Please!

Customers should know in advance the general cost of receiving copies. This will help them narrow the request, plan for the cost, or make plans to view records in person (free). Providing access to records is – *and always should be* – free. In my opinion, providing the convenience of a copy is not something taxpayers should gift to requestors.

Advertise the free records you have available on your website. Lead your customers there for their benefit and convenience.

- Include direct links (not general search tools/pages) in your very first response to the customer.
- In most instances, links are considered an installment.

By establishing the actual cost, customers seeking copies are:

- Compelled to make an efficient request.
- Required to provide payment.
- Obligated to claim their records.

It's tempting to rely on the defaults established by RCW 42.56 but don't do it.

These defaults result in miniscule reimbursement to the agency and do not reflect the actual cost of providing copies. In most cases (*see the 2021 JLARC report*), agencies are waiving fees altogether because they are not worth the effort to collect. In my experience customers get very irritated when asked to pay for nominal amounts; they see this as punitive “red tape”.

Let's Compare Kennewick's Reimbursements:

2021 January 1 – December 31 = \$1,873

2022 January 1 – October 17 = \$11,747

Since implementing our new fee schedule on 12/29/2021, our complaints about fees are almost non-existent. I can recall only three instances so far.

Provide Records in Installments:

- Keeps records flowing out the door.
- It requires the customer to stay engaged.

TIP: Keep track of the number of days requests stay paused waiting for the customer to claim. This may help to mitigate any PRA violations.

Deposits RCW 42.56.120(4):

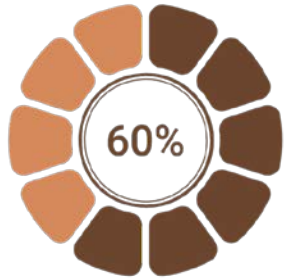
- A minimum flat-rate charge helps establish the 10% estimate for large requests.
- For our agency, we know the cost of electronic transfer will be at least \$6.27 (\$.62 deposit).
- Puts the customer on notice that a fee – or in person appointment – will be necessary.
- Collect Deposits for:
 - Large or complex requests.
 - Anyone with a history of a recently abandoned a request.

Your Order's Almost Ready . . .

KEEP YOUR CUSTOMER PROMPTLY INFORMED



Always meet your deadlines. *An appetizer is better than leaving your customer HANGRY.*



Clearly communicate. *Your correspondence should describe who has the plate and for how long:*

- Status of request while waiting for customer action.
- Where and how to provide payment.
- How to inspect.
- Specific deadline dates – not a reference to a number of days. Only use number of days when you tie it to their action.
 - *“Within four business days following your action we will”*
- Consequences of abandoned requests.



Your Order's Almost Ready . . .

Deadlines are black and white. It's one of the easiest ways to judge an agency's efforts. (For the requestor and a court). Missing them is the quickest way to lose credibility with your customer.

Know where you're at with the next installment days prior to the deadline. Transmit something – even if it's a much smaller bite than you anticipated.

If you absolutely must move the deadline:

- Do it as soon as possible and no less than two days in advance.
- Explain to the customer the valid reasons for the modified installment date.
 - You anticipated finding records but have looked in all areas and determined none exist. You are expanding your scope.
 - An emergency (fire, flood, illness, etc.) caused you to reprioritize your workload.
 - Their request is your top priority and they are at the front of the line. (You may need to juggle deadlines for other requests to get this customer the assistance they need).

Always leave the door open for collaboration.

- Are you able to prioritize production based on their preference?
- Can you create a record more quickly than finding 20 documents?
- Can you put them in touch with customer service requests while you work to find responsive records?
- What deadline is the customer up against. What can you do to help them meet their timeline?

Explain what's coming up down the line.

- Big projects.
- Limited workforce.
- Implementation of new software/operating systems.

Consequences for Abandoned Requests:

- Deposit required for future requests.
- Records subject to retention schedule (may not exist if request is made again).

Mind Your Table Manners

THINK ABOUT & PRACTICE PROFESSIONALISM

Raise your hand if you think the Public Records Officer has the best job in the whole agency.

Raise your hand if people cringe when they hear your job title.

Be proud of the work you're doing – it's one of the most important jobs in the public sector.

Mind over matter, matters.

Decide that elephants are your *FAVORITE* and dig in!

Encourage your team to be on their best behavior.

Abolish flippant, sarcastic or negative comments (especially written ones).

What story does your written conversation tell a judge?



Mind Your Table Manners

I never get offended when co-workers remark on their horror over my job. I absolutely understand why it's not for everyone – and then I try to change their perception.

But! It's important that each of us – and the leaders we work with – are mindful of the connotation negative public records talk has on the people we supervise or work alongside.

If your co-workers hear that public records are the worst task possible, how will they feel when assigned a request? **Speak up when you have a public records victory.** Share positive comments from the people you help. **Change the narrative and perspective that Public Records Officers have the worst job in the agency.**

Who Is Invited?

ANYONE WITH RESPONSIVE RECORDS

Sometimes the elephant eater is dining alone and sometimes they're in a banquet room.

Under the right conditions, everyone gets invited to a records request party!

As leads are discovered, you may need to invite others to the party.

Don't hesitate to send a "Save the Date".

This puts your team on notice they may need to begin planning for the "event".



Who Is Invited?

One of the most vital roles the Public Records Officer fills is to provide support and encouragement to elephant eaters.

Don't hesitate to dress your elephant up!

Recognize efforts of elephant eaters at city-wide events.

Give credit! Name the elephant eaters when customers give praise.

1 Star Review



“DO NOT RECOMMEND!”

Do your elephant eaters feel like leaving a bad review? Encourage them to seek you out if they're grappling with a request.



Trouble explaining why they didn't find a record?

- If the Public Records Officer can't understand why records weren't found then a judge/jury/requestor won't understand either.
- Work together to get it figured out!

Anticipate frustration – before they choke on a bite.

- Discuss if there's a way something can come off their plate.
- Help draw in other resources.

Listen to their expertise and determine if it's warranted to seek narrowing/clarification, etc.

1 Star Review

If you think regular elephant eating is tough, force feeding is a nightmare.

Through consistency, you can demonstrate you are a resource for your elephant eaters. While your team may not love seeing another serving of elephant headed their way, they'll be much more open to another bite when they trust what you're dishing up.

You're in a unique position. You must advocate fully for the requestor, but also provide customer service to your colleagues.

Party of One?

BE SURE YOUR DINERS KNOW THEY ARE NOT ALONE!

Set up a meeting with your records team points of contact and others as necessary.

- Who's going to do what?
- Who is serving the first course?
- What's on the menu?

Staff may have more than one request assigned at the same time!

- Keep communication lines open to decide which bite comes first.
- If they get stuck or overwhelmed on one request, switch to the other.

Keep senior-level administrators/elected officials aware of large requests.

- They may need to join the table.
- They may need to re-delegate responsibilities to allow an adequate search.
- Planned projects may need to be delayed.



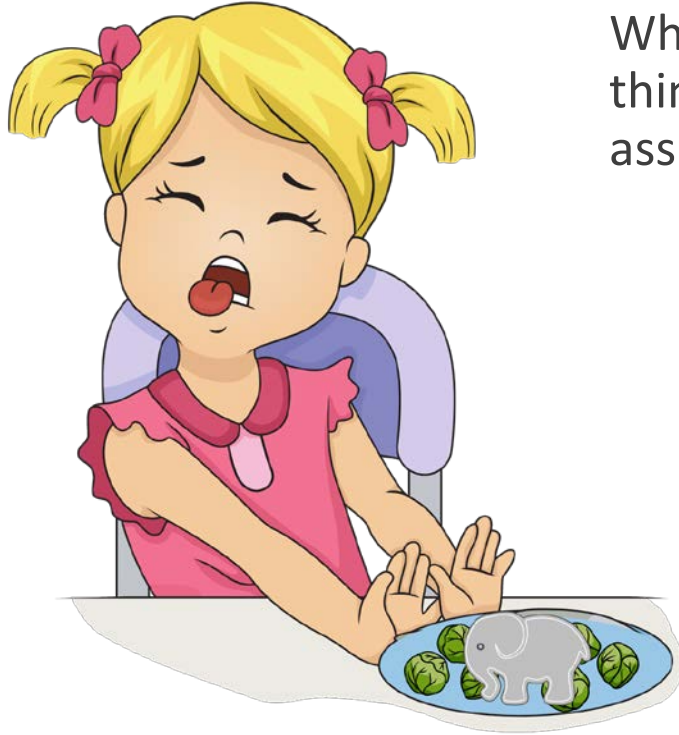
Party of One?

You'll notice I keep returning to this concept – **your role as a support person for your team cannot be understated.**

Unless your agency sends the majority of staff to ongoing public records training, you are likely standing alone with the weight of the public records body of law on your shoulders.

Sometimes it's tempting to resort to "because I said so" when someone is reluctant to eat elephants. But, it will pay off to put in the effort to be an ally and a resource to your team.

Yucky! Why Did *I* Get Invited?



When assigning a request to a first-time diner – or someone who doesn't think **THEY** ever need to eat an elephant, be ready to provide more assistance than typical.

- First time diners.
- Uncomfortable requests.
- Leadership/elected officials.
- Unusual work demands/circumstances.
- Negative requestors.

Cut the elephant into pieces before you put it on their plate . . .

Yucky! Why Did *I* Get Invited?

On the day someone receives their first public records request they often feel like the worst has happened and the horror stories they've heard come rushing back. **Everyone's inner child seems to rise to the surface when assigned with tasks they dread.**

It's important that these requests are not taken personally. This is simply another aspect of our job – even for people who seldom work on requests. It can be alarming to receive a request. This is especially true if a staff member is named in a request or if they receive a request that's personal in nature.

When someone is personally named in a request it can feel like a personal attack. Be sure your team members know they can come to you and talk about their concerns.

- Explain that usually we can't ask (and it doesn't matter) why someone makes the request.
- Remind your team to remain calm while you share bites.
- Be sure they know they can talk to you if they're feeling targeted.
- Be ready to explain privacy versus the public's right to know.
- Describe how their expertise will help solve the request (develop leads & identify places to search.)

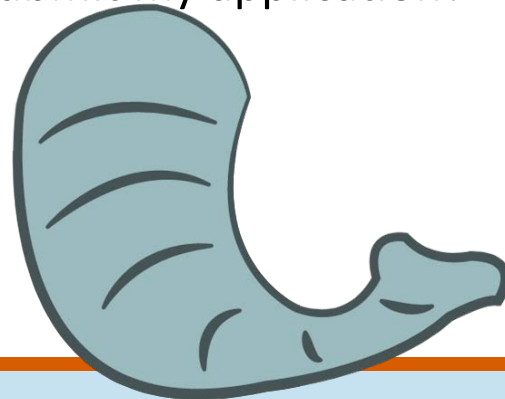
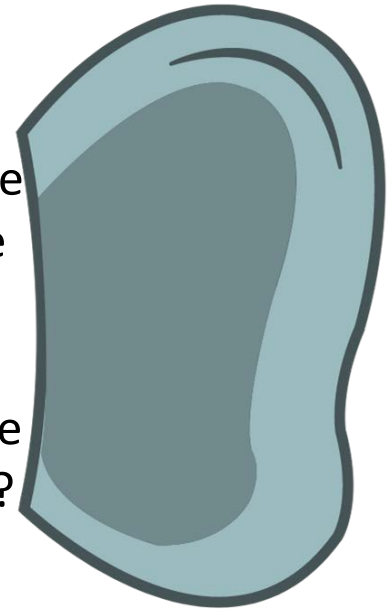
Acknowledging the anxiety our team members may have while ensuring the requestor receives the fullest assistance possible is a tricky path to navigate.

Wow! That's a Big Elephant!

I CAN'T EVEN SEE THE WHOLE THING!



“For 2021 and 2022 please provide the recruitment and advertising outreach, copies of any applications received, the interview questions for each year, the selection criteria, the rubric and any notes and in 2022 the emails. Please also provide ordinances/ resolutions/policies controlling boards and commissions. Please provide demographics for the same time period. Have the interviews already occurred for 2022? Where do I submit my application?”



Wow! That's a Big Elephant!

Although this request is fairly straightforward, all of the items are merged together. This makes it difficult to tell where one item ends and another begins.

Note the requests for 2021 and 2022 items look identical but when you look closely you see there's one key difference.

If this were assigned out to multiple staff members, would they know which part(s) they were responsible to satisfy? When they were done, would you know which parts of the request they worked to satisfy? Would anything fall through the cracks?

BREAK THE ELEPHANT DOWN INTO BITES BEFORE YOU SHARE IT WITH ANYONE:

- The easiest way to cause a stampede is to share a raw elephant in its whole form.
- It sometimes takes me a total of an hour or two to break an elephant down into portions. And I don't do it all on the first day. When I feel overwhelmed, I'll walk away from it for a bit, return with a fresh set of eyes, and find something I would have overlooked if I'd just treated it like an order of fries.
- Take your time for this crucial step. It sets the groundwork for the entire request.**

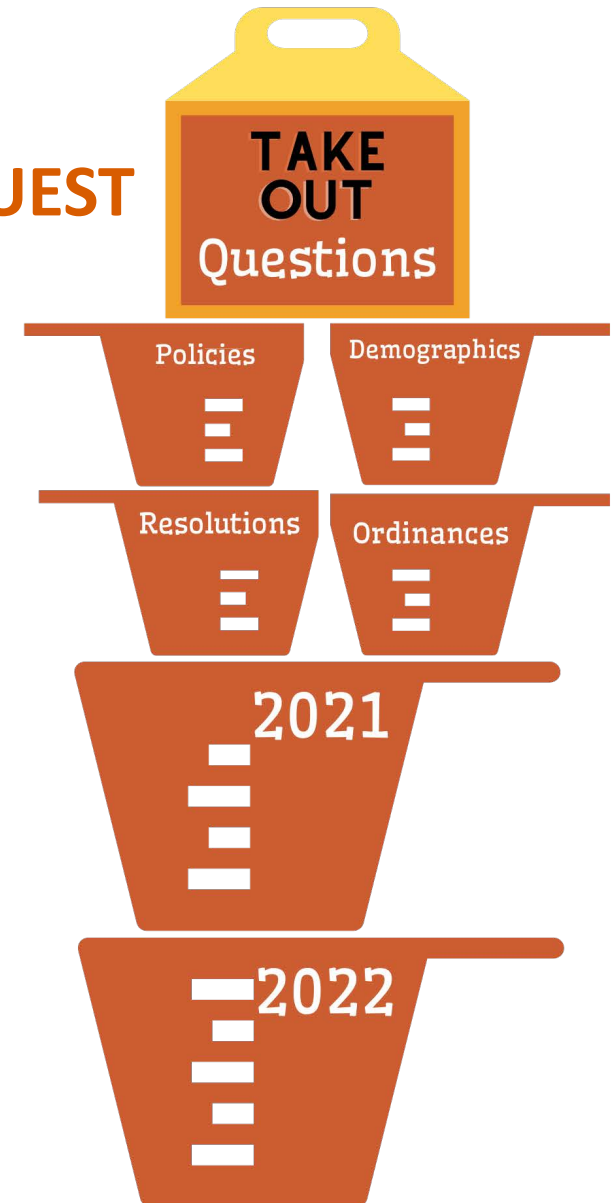
Portion Control

ADD REFERENCE NUMBERS TO EACH ASPECT OF THE REQUEST

1. 2022 Recruitment
 - a. Advertising outreach
 - b. Applications received
 - c. Interview questions
 - d. Criteria
 - e. Rubric
 - f. Notes
 - g. Emails**

2. 2021 Recruitment
 - a. Advertising outreach
 - b. Applications received
 - c. Interview questions
 - d. Criteria
 - e. Rubric
 - f. Notes

3. Boards and Commissions Ordinances
4. Boards and Commissions Resolutions
5. Boards and Commissions Policies
6. Population Demographics (2021 – 2022)
7. Customer Questions
 - a. Have the interviews occurred for 2022?
 - b. Where do I submit my application?



Portion Control

This is the same request but has been broken out into numbered categories and then alphabetical references for each specific topic/record. Reference numbers eliminate confusion for everyone.

When you break the list out, it will look like you've duplicated some items (see 3 – 5). You haven't. You've simply listed them in the way they should be addressed – as their own unique item. Take out any conversational phrases the customer provided. Break it down to brief, yet complete, descriptions. I keep the original wording saved as a note in GovQA but work from the break-out version.

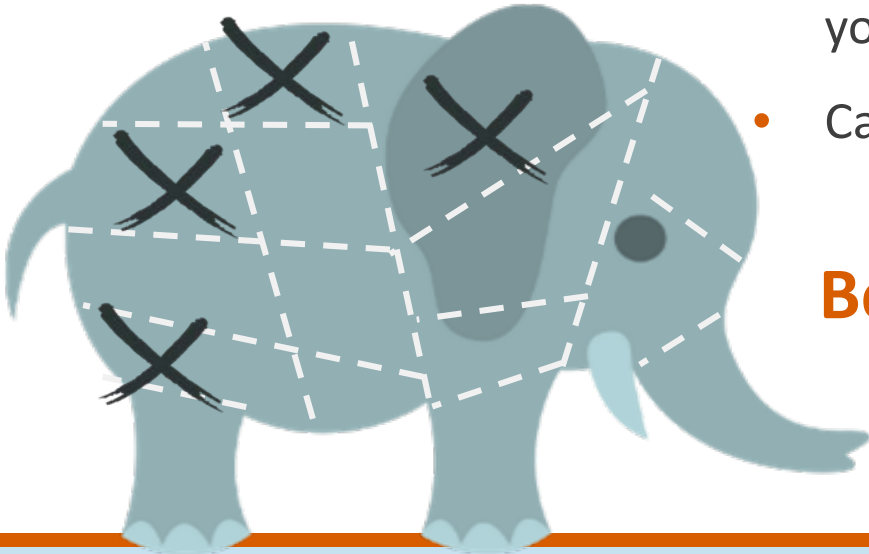
Using reference numbers ensures everyone will be working from the same understanding when you're assigning a task to a coworker, communicating your progress to a customer, or explaining your findings to an attorney. When you assign a bite to your team you'll do so as "Please complete item 1.g." When you respond to the requestor you'll do so as "Transmitted to you today are 10 items responsive to item 1.g."

TIP: Ask the customer to take a look at your breakdown and to alert you if they believe you've misunderstood or misrepresented their intent. This is also a great time to talk with them about the overall scope, cost, and time to satisfy. I've found customers are reassured you are taking their request seriously and are invested in helping them when given this type of detailed response.

Feeling Full?

NOT EVERY BITE IS MEANT TO BE EATEN.

- Records were destroyed (before the request came in).
- Records that don't exist – and never have.
- Asking for answers instead of records “why”, “how” “when”?
- Records for another jurisdiction that were not used or retained by your agency.
- Categorically exempt records.



Be polite when declining bites.

Feeling Full?

These are safe steps to lawfully minimize the request scope.

Oftentimes requestors don't understand that the public records request process is strictly limited to gathering the identifiable, existing records they want.

We do not answer questions, problem solve, etc. through this process. Therefore, even after the elephant is eaten, they may not be any more satisfied than they were to begin with. No one wins in that scenario.

If your elephant would be better served through a different process, be sure to talk with your team. Help your customer navigate through your agency with requests/concerns outside the PRA.

In my experience, the largest requests are often the result of a grievance or misunderstanding. Your first course of action may be to speak with your management team about the request and ways to resolve the underlying issue. **BUT! Continue to satisfy the request until the requestor voluntarily withdraws it.**

Elephant Flambé

YOU DON'T WANT TO EAT A BURNT ELEPHANT. THINGS GET HOT IN A HURRY WHEN WE:



Know the requestor or have a relationship with them.

Pretend you don't.



Interpret what we THINK the requestor wants versus what they described.

"Oh, this is just a phone message – they won't want that."



Are too familiar with our everyday work.

Routines make it easy to forget steps taken.

**TIP: Imagine you're training someone new to take your position.
Where would you tell them records are created, transferred and stored?**



Elephant Flambé

Often, our first response to an elephant meal is to push away from the table as quickly as possible. It's critical that we don't push back in risky ways. Here are some pitfalls to avoid.

Knowing the requestor:

- Pretend you don't.
- If there's a conflict of interest (or one could be perceived), ask your team to declare it so you can help establish a plan to prevent the appearance of misconduct.

Interpreting:

- It's fantastic if your team knows what the customer needs (and they should share that with you) but in the end, the wording of the request always rules.
- **WHEN IN DOUBT SEEK CLARIFICATION!**
- Don't filter the records based on staff's understanding of the issue.
 - Respond to the letter of the request – not the intent – until the requestor gives their written consent to alter the scope.

Inhaling Our Meal – Being Too Familiar with Work:

- Ask your team to slow down and mentally or even physically walk through what they do each day.
- Consider how records (or information) get from one place/person to another.
 - Have they tuned out background “noise” that is actually a record?
 - Are there records related to an automated workflow process that would be considered responsive?

(EXAMPLES: transmittal emails in your inbox, notes attached to an electronic routing sheet, approval signatures added to a document as it moves through processing).

Airplane Forks

BREAK THE REMAINING ELEPHANT INTO REASONABLE BITES.

Look at the rest of your plate and figure out what you can add to it – or take away.

- Make reasonable plans.
- Don't over-commit.
- STOP filling your plate when it's full. Come back for seconds.
- What other deadlines are looming?
 - Vacation – either yours or someone you're covering.
 - Major disasters/incidents.
 - Mandatory trainings.

Don't wait for the due date to start dining.

- Nibble as you go along.



Airplane Forks

If you've ever used airplane noises to get toddlers to eat one more bite, you'll know what this slide represents.

When setting up meetings to tackle requests, you may find it helpful to work separately with ill-mannered diners first. In my family this was known as the “kids table”. Until we learned our table manners, my cousins and I were stashed in a nearby room standing on chairs and waving olives from our fingertips like a bunch of clowns. It took time before we were ready to join everyone else.

Be sure your picky eaters aren't ruining the experience for everyone. Put in some coaching before you invite them to the table with the rest of the team – no olives in sight.

Don't Stuff Your Face

AVOID GETTING SICK TO YOUR STOMACH

Start Using
ACTIVITIES



Take Small Bites

Use activities to take as many small “bites” as you’d like.

Swallowing bites helps you to feel accomplished.

- Over time, you’ll be happy to see fewer bites on your plate.

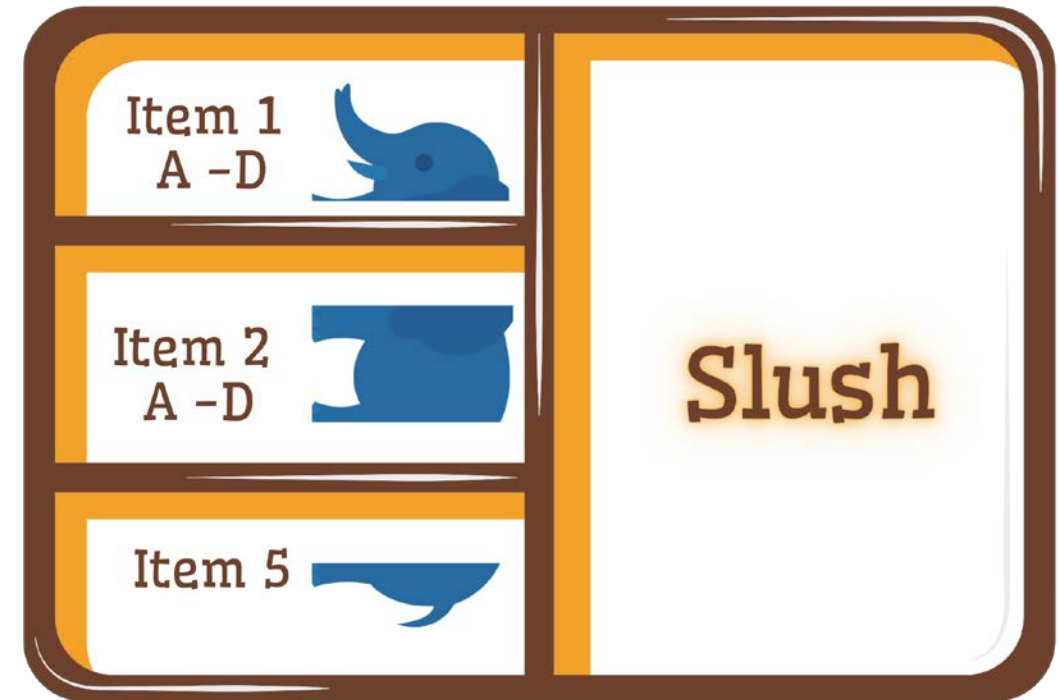
Retrace your steps easily by zeroing in on a specific activity.

- You’ll be able to find a document quickly if there’s only one or two places to look for it.
- Makes responding to future interrogatories a breeze!

Keep Your Food Separated

NO ELEPHANT SALADS, PLEASE

Activity ID	Staff	Description
2755	Horton Geisel	Item 1: 2022 Recruitment A - D
2756	Horton Geisel	<i>Slush Activity</i>
2784	Horton Geisel	Item 2: 2021 Recruitment A - D
2829	Horton Geisel	Item 5: Policies



Keep Your Food Separated

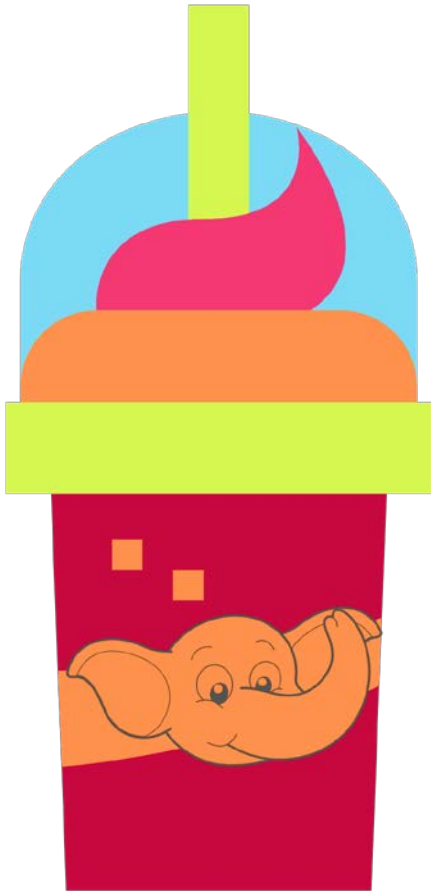
These are Horton's "bites" for the same "elephant". He's broken up his work to keep each topic separate from the others. See how he's kept Item 1 from touching Items 2 and 5?

If he needs to prove he looked for the 2021 recruitment criteria, he can jump straight to the files uploaded to Activity 2755.

Look at Activity 2756 there's a "slush" activity.

Have an Elephant Slushy!

SLUSHIES: PROVEN TO PREVENT SQUIRREL SYNDROME HEADACHES



- Create a “slush” activity to keep track of leads and ideas.
- It remains open while you work to satisfy all other “bites”.
- As you find (or think of) leads, add notes to the “slush” activity.
- You’ll go back and resolve this “slush” activity as you work on other activities.
- The “slush” activity may cause additional full-fledged activities.
- Slushies often loop in other staff.

A slush activity keeps your focus on the bite in front of you.

Have an Elephant Slushy!

CAUTION: Be sure that if you notice something time sensitive – you don't wait to loop other people in to the dinner party.

EXAMPLES:

- “For item 2a check to see if the website subscription lists contains records”.
- “Check with Finance for Affidavits of Publication.”
- “Have IT conduct an email scrub for ‘John Jacob’ in 2022”.
- Celeste was here when they started the Arts Commission and she keeps everything. She may be able to help locate the original policies and procedures.
- I was looking for the Diversity Commission vacancy ad on our website and came across a census report for demographics at [this link](#).

Keep a Food Journal (AKA SEARCH LOG)

Use a new search log for each bite.

- Keeps the diner focused on the current bite rather than the entire elephant.
- Helps organize the diner's thought process and to recall details later.

Your search logs will be invaluable to prove:

- Where they looked.
- What they found.
- Where else to look.
- How much time was spent (establishes reasonable search and fees).
- Where to go for follow-up requests.
- Their future self will be thankful. TRUST ME.
- Proving negatives (why they didn't find the record the customer expects.)

Let's take a look at that journal . . .



Keep a Food Journal (aka Search Log)

It seems like each week significant members of our teams are retiring and new employees are coming on board. **An often overlooked benefit of search logs is the documented transfer of institutional knowledge.**

When someone leaves, these logs help us to understand processes maybe known only to the former employee and where their records were stored. When similar requests come through, we can use the search logs to duplicate the steps the prior employee used to help us find records now.



PUBLIC RECORDS REQUEST SEARCH LOG

Public Records Request #
C000123-102722 Smith

The agency is required to maintain evidence that it has conducted a sincere and adequate search for all reasonably locatable responsive records.

You are required to follow any obvious leads uncovered during the search process. Details regarding your search efforts are to be documented on this form and uploaded to your activity along with any responsive records.

NAME: **Horton Geisel**

ACTIVITY ID: **2755**

Date(s): **10/28/2022; 10/31/2022; 11/1/2022**

DESCRIPTION OF RECORDS REQUESTED:

1. 2022 Recruitment
 - a. Advertising outreach
 - b. Applications received
 - c. Interview questions
 - d. Criteria
 - e. Rubric
 - f. Notes
 - g. Emails
2. 2021 Recruitment
 - a. Advertising outreach
 - b. Applications received
 - c. Interview questions
 - d. Criteria
 - e. Rubric
 - f. Notes
3. Boards and Commissions Ordinances
4. Boards and Commissions Resolutions
5. Boards and Commissions Policies
6. Population Demographics (2021 – 2022).
7. Customer Questions
 - a. Have the interviews occurred for 2022?
 - b. Where do I submit my application?

ACTIVITY SCOPE: ☐ Entire Request ☒ Only These Items: **1.a, b, c, d & e.**

Search Log Review – Front Page

Notice the spaces to add the diner's name, activity ID and date.

The request is broken up into a numbered outline format for easy reference.

The person eating this bite will mark whether this search log applies to the entire elephant (ENTIRE REQUEST) or just a bite (ONLY THESE ITEMS). If it's just a bite, they write in the number(s) from the list.

Bites can be small: "1.a." or larger "1, 2 & 3".

For each "bite" (activity) the steps are repeated. **A new search log will be bundled with the documents found under each separate activity.**

PLEASE DOCUMENT YOUR SEARCH AND THE LOCATIONS YOU CONSIDERED USING THE FOLLOWING PROMPTS:

SEARCH PROCESS:

Item	LOCATION/RESOURCE	N/A	If Applicable	Description
1	File Cabinets	☐	☐ Records exist ☐ No records found	Cabinet Location(s): Folder(s): Cabinet Location(s): Folder(s):
2	Archived Physical Files (Basement, off-site Storage, etc)	☐	☐ Records exist ☐ No records found	Storage Location(s): Box(es): Folder(s): Storage Location(s): Box(es): Folder(s):
3	Microfilm – Building Records ^(electronic) \\ci.kennewick.wa.us/microfiche	☐	☐ Records exist ☐ No records found	(COPY/PASTE FULL FILE PATH FOR EACH AREA SEARCHED) Property File # used: (Get # from the archived physical files) File Path(s) Reviewed:
4	Microfilm – Planning Records ^(electronic) \\onbasedata/Planning	☐	☐ Records exist ☐ No records found	(COPY/PASTE FULL FILE PATH FOR EACH AREA SEARCHED) Search Terms used: File Path(s) Reviewed: Search Terms used: File Path(s) Reviewed: Search Terms used: File Path(s) Reviewed:
5	Microfilm ^(physical)	☐	☐ Records exist ☐ No records found	Storage Location(s): Film #:

Search Log – Locations Considered & Searched

We've listed common locations to search. These places are not required for every request. Only search in areas reasonably calculated to contain responsive records for this activity.

For instance, if someone asks for a native copy of an Excel spreadsheet created last week, you'd not need to look in any of the first five locations. You'd mark "N/A" for these locations and leave the other columns blank.

However, if someone asks for a microfilm record and you find something you'd mark the "Records Exist" box and fill out the description column telling us where you found the record.

If you look and don't find the record, you'd mark "NO RECORDS FOUND" and then you'd be sure to mention in the search summary why the record isn't there. "The destruction log dated 2-15-2019 shows these records were purged."

RESULTS/SUMMARY:

My search is complete. I've looked in all areas reasonably calculated to discover records and have followed all leads.

☐ I identified the following records as responsive for items [Click or tap here to enter text.](#) *(use the numbers from the description):*

Format/Type of Record	Enter # Below	Possibly Exempt*
Scanned Pages <i>(which did not previously exist electronically)</i>		☐ Yes
ACTUAL TIME SPENT SCANNING	EXACT MINUTES Please also log this time in GovQA as a separate time entry.	
Electronic Files Provided <i>(restore emails from the vault before uploading)</i>		☐ Yes

**Please flag all records you have identified as possibly exempt.*

⚠ Fill out below if you were unable to find one or more of the items assigned to you:

☐ I did not find records for [Click or tap here to enter text.](#) *(use the numbers from the description)* because [Click or tap here to enter text.](#)

☐ **EMAIL SCRUB:** My search for this activity is complete but an email scrub should be conducted.

Date Range: Mailboxes (to/from): Keyword(s):

Outside Contact Name/URL/Email:

Search Log – Summary

This is where you'll tell your future self the results of all your hard work. Once you've done everything possible to finish your research and there is absolutely nothing else you can do, you'll either mark that you found documents or did not.

In our agency, we bill the actual cost of staff time to prepare certain copies – such as scans. We require documentation for exactly how much time it took to scan records.

We require a count for the number of original electronic files copied.

If records were not located we require a brief description explaining the circumstances.

It's important that we can communicate to the customer why we were unable to locate the records.

Where Are We Dining?

IN KENNEWICK WE USE GOVQA – AN ONLINE RECORDS PORTAL

- All communication takes place within GovQA.
- All shared work is done through activities.
- All records produced are attached to the activities.
- All time is tracked by type under the activity.
 - Research.
 - Compiling.
 - Scanning.
 - Administering.



Where are We Dining?

GovQA is similar to other specialized systems such as Energov, MUNIS, ImageTrend, Eden, and Ileads. It is a system designed to perform specific tasks and keep records associated with those tasks organized. Just as we wouldn't create a fire report outside of ImageTrend or write up a permit outside of Energov, we do not work on requests outside of GovQA.

We strictly communicate in GovQA only. Using text/email circumvents the core purpose of GovQA. The goal of GovQA is to have a single point to look for everything tied to each specific request.

Because GovQA is a shared portal, we can see the work our teammates have taken to satisfy the request. This prevents duplicated efforts and missed records.

Where Are We Dining?

KENNEWICK: GOVQA – OUR ONLINE RECORDS PORTAL

- Provides fullest assistance to customers.
 - Easily transmit records.
 - Easily submit requests & track progress.
- Makes it simple to share request progress and results between colleagues.
- Keeps searches organized.
- Facilitates quicker responses to subsequent requests for identical records.
- Tracks the time and cost of producing records.
- Invaluable for litigation purposes.

*Krystal's Requests - NOT WAITING ON CUSTOMER						
+ New Request Search New Message Edit Export Letters Print Delete						
Displaying records 1 to 14 of 14						
	Reference No	Request Info	Request Status	Required Completion Date ^	Customer Last Name	Public Record Desired PRR & PDR
☐	C000075-022522	0 1/2 3	Assigned	3/4/2022 8:30 AM	Lopez	Maverik Fuel Station / convenience store at 4306 W Clearwater Ave 1. Blue prints 2. Floor plans 3. Structural drawings
☐	C000076-022822	0 0/4 1	Assigned	3/4/2022 4:30 PM	Vega	15 E 1st Ave 1. Any code compliance violation complaints 2. Most recent fire inspection report 3. Building Permits
☐	C000078-022822	0 0/1 1	Assigned	3/7/2022 8:30 AM	Campbell	Foodies, Brick & Mortar 308 West Kennewick Kennewick, Wa 99336 1. Fire incident report 2. Fire Investigation Report 3. Photographs

Where are We Dining? Kennewick – GovQA

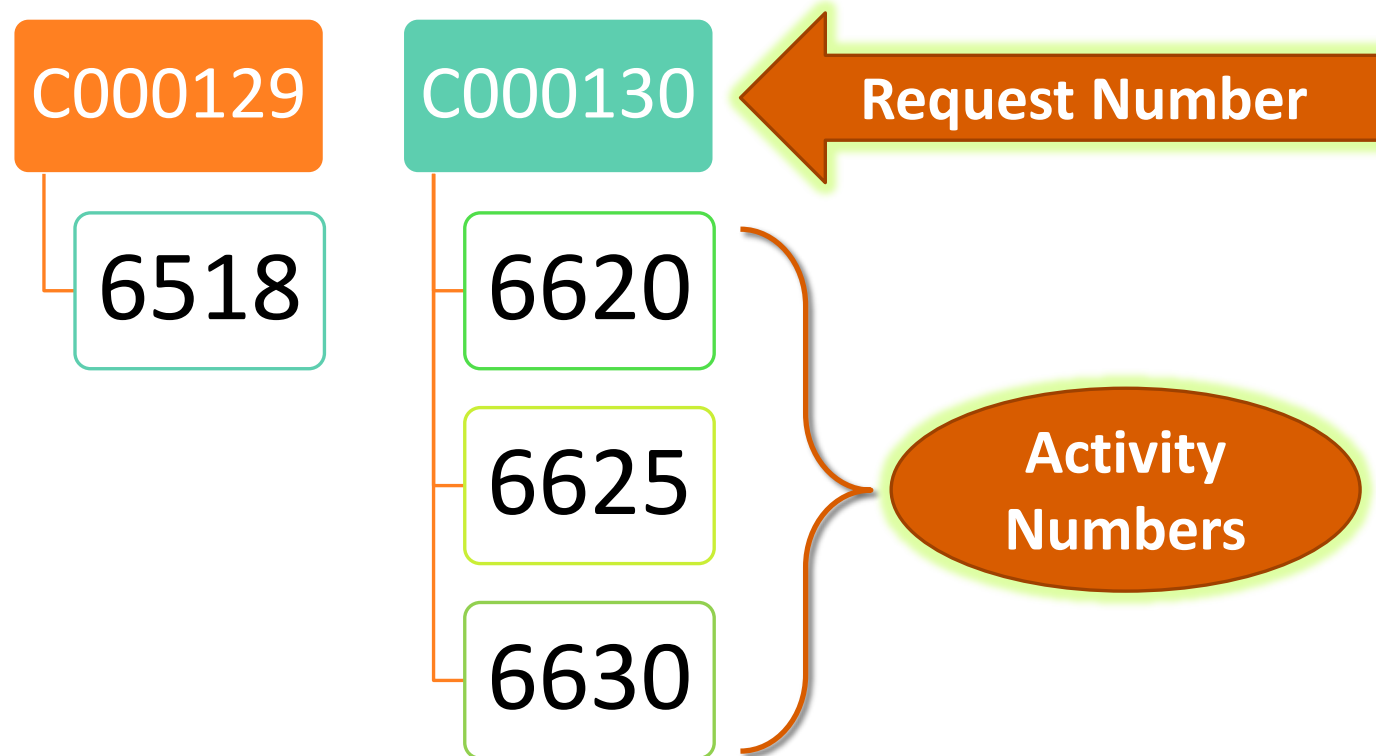
A shared system for public records has many benefits.

If your agency does not have GovQA or a similar system, you'll may want to set up a similar structure using network or shared drives.

Where Are We Dining?

IF YOU DON'T HAVE A SPECIALIZED SYSTEM . . .

On your shared network/drives create a “parent” folder for each request and a “child” folder for each activity.



IF YOU DON'T HAVE A SPECIALIZED SYSTEM . . .

Here you can see two requests listed. The first, C000129 has one activity in total. The other has three separate “bites” – each saved in its own subfolder.

RCW 40.14.026(4) requires each agency to maintain a log of public records requests. If you use an Excel spreadsheet, be sure to assign a unique number to each request. You’ll also want to number your activities/bites to keep them distinct and identifiable – and organized under the request number.

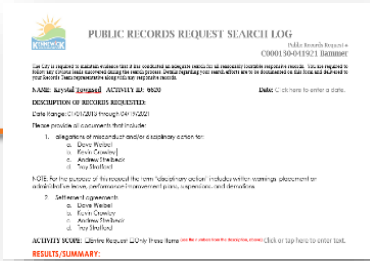
Taking it one step further, add hyperlinks to your Excel spreadsheet to jump straight to the work you’ve compiled in the folders shown above.

Where Are We Dining?

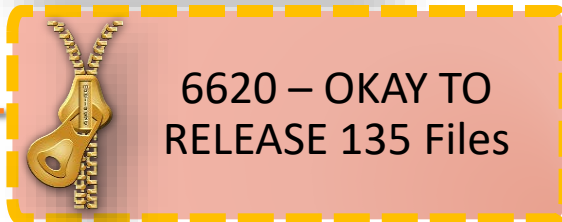
IF YOU DON'T HAVE A SPECIALIZED SYSTEM . . .

6620 -
Complete

The folder name has been changed to show the activity status is complete.



A tracking log is saved in each activity folder.



This is a bundled zip folder ready to transmit to the customer.

6620 – DO NOT RELEASE–
10 Files



These need redaction before release.

IF YOU DON'T HAVE A SPECIALIZED SYSTEM . . . Continued

Each activity folder will contain a search log and any responsive records. Records which do not need redacting should be kept separate from those ready for release. Records ready for release should be bundled in a zip folder to make transmitting them easier.

If you added hyperlinks to your Excel spreadsheet you'll need to update the links when you change the folder name.

TIP: You may want to keep a searchable list of the zip folder contents as an attachment to the search log. (*i.e. Print the directory*).

Bus the Table

All done? Advise the customer you are taking time to review the request one last time before closing.

- Is there something they expected to receive but haven't?
- Are there concerns you can address now?
- Did they have trouble opening any of the attachments?

Review all search logs against the itemized request.

- Verify every item was searched.
- Verify all leads were exhausted.
- Files Count: Compare file count from search logs against files provided.

Is one last team meeting warranted?

Use clear language when closing the request.

- "... satisfied and complete as of today's date."
- "This response is our final and definite action."



Bus the Table

Resist the urge to run from the table.

Demonstrate your efforts to conduct a SINCERE and ADEQUATE search.

Earnestly offer an opportunity for the customer to improve your search efforts now.

Speak to a Manager

You understand the importance of public records requests and the time commitment they demand. ***But do your agency's leaders and employees know this?***

Ask your agency leaders to demonstrate and communicate what it means to provide the fullest assistance possible. ***A culture of compliance starts at the top of the org chart.***

Add “Public Records Requests” as a standing topic to staff meetings. This encourages employees to communicate about the work they are doing to fulfill public records requests and ***highlights the importance of their work.***

It's important that we recognize and praise the efforts of our elephant eaters



Speak to a Manager

Searching for public records is hard work.

People become planners, detectives, engineers, permit techs, etc. but only a few of us have signed up to be Public Records Officers. For most people, fulfilling public records requests is not satisfying or rewarding in ways their main tasks and responsibilities provide.

Is someone on your team constantly chewing elephants while everyone else is eating pizza? Find a way to tag team requests. Crosstrain to allow others to take a turn at the table.

Has someone gone above and beyond to improve transparency in your agency? Recognize Their Accomplishments:

- Meet with them one-on-one and tell them the difference they made; share any kind remarks from the customer.
- Send an email to their supervisor detailing their success; ask that it be considered when preparing the employee's annual review.
- Nominate them for agency awards/ceremonies.
- Cheer for them at an all-staff meeting.
- **Recruit them!**

