

# **Finding the Sweet Spot: Effective and Painless Email Management**

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# Goals

1. Explain how Bellevue found its “sweet spot”
2. Provide ideas of how other local agencies can find a balance between oversight and empowerment of its employees



# The Bellevue Context

- 155,000 residents (2024)
- 160,000+ jobs in downtown hub
- Light Rail
- Predicted +70,000 and +35,000 housing units next 20 years
- One of Washington's biggest "majority-minority" cities
- City Manager / Council form of government





# Context: The city's workforce

- 1700 employees at peak seasons
- High staff turnover 2015-2022-ish
- Multiple work locations
- Mix of field staff, office workers, volunteers, consultants, elected/appointed officials
- Default to Microsoft products



# Context: The city's records program

- Public Records centralized program
- Housed in City Clerk's Office – 18 people total
- Public Disclosure & Records Management are two separate teams (4 FTEs each)
- Policy development, consulting, training, support



# How it Started...

Pre-2004: No email management at all. All emails were saved indefinitely.

In 2004, a 2-year retention was applied to all email, except City Manager and Council members, which were deemed permanent.





# How it's Going...

- Since 2007: Email Management Policy and Email Storage Folders
- Function-specific
- Users sort their own emails according to function
- 90-day retention on emails that are not in email storage folders
- City Mgr and Council emails are permanent





# Email Management Policy

- First developed in 2007-ish, updated periodically since
- Lists WACs, RCWs, and city code requirements for public records
- Defines “transitory” records
- Prohibits creation of new .pst files



# How \*Email Storage\* Folders Work

- Each folder has a retention tag
- Each retention tag corresponds to a retention policy in Microsoft Purview
- IT developed a script that adds the appropriate set of folders to new email accounts
- Users drag emails that need to be kept longer than 90 days into the folder that best matches the function of that email





# Things to Consider

- Good working relationship with IT
- Clear roles and responsibilities
- “Rules before Tools”
- Communication and understanding



# Training and User Support, Part 1

- Initial touchpoint to new full-time staff at new hire orientation
- Required virtual training for all new full-time staff during their first 90 days.
- Virtual training available 24/7 to all staff
- Resources on our intranet site and periodic RM tips on intranet home page



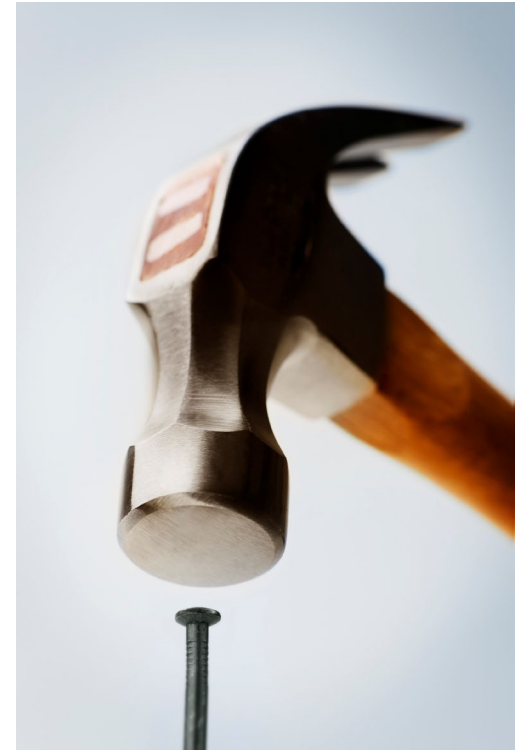
# Training and User Support, Part 2

- Live 1:1 training available upon request
- “Road Show” trainings for teams, divisions, departments
- Records coordinator network is also a resource for staff
- Annual in-person outreach table in city hall



# Email Management Best Practices

- Be appropriate and professional
- Keep city emails in your city email account
- Stop and save emails that document city business
- Keep emails to one subject
- Do not cc yourself
- Use city-approved systems for file sharing instead of email attachments



# Email Management Best Practices

- Put a recurring appointment on your calendar to review emails that will be deleted soon
- Save red-light messages immediately; takes less time than going through them later
- Use Teams instead of Outlook for anything not business-related
- Leverage Outlook Quick Steps when applicable

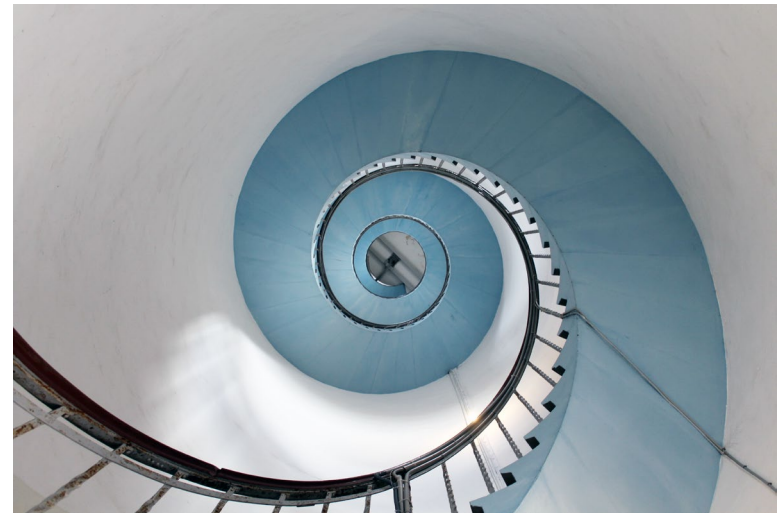


# Refine as You Go

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2018: migrated to Exchange Online, shifted from using Commvault to Microsoft Compliance Center (aka Purview)

2019: Implemented a quarterly compliance-check process that uses an IT script





# Monitoring for Non-Compliance

- IT PowerShell script runs quarterly and notifies staff if they have custom folders that are outside of the \*email storage\* structure
- Purpose is to make end users aware that their emails may be deleted sooner than they realize
- End users are empowered to take corrective action themselves
- Records staff are available for one-on-one assistance





# Monitoring for Non-Compliance

## Pros:

- RM team has increased visibility into how staff are organizing their email folders
- RM team can track compliance over time and use in performance metrics





# Monitoring for Non-Compliance

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## Cons:

- These emails often get overlooked or ignored, or staff are confused and take no action
- There are some glitches/false positives that are difficult to solve for



# Challenges

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- Users who still have the legacy “permanent” status
- New approach for onboarding elected officials
- Function-based as opposed to position-based (capstone)
- People who save everything in a long-term folder – personnel issue, against policy
- Non-FTE staff (volunteers, consultants, part-time) don’t get included in that mandatory training – they fall through the cracks a little bit



# Benefits

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- Greater compliance, less risk
- Makes e-discovery more efficient
- Lays the foundation for implementing future applications
- Raises awareness of RM among staff – everybody uses email





# Bellevue's Sweet Spot

- Established email management policy and practices
- Big picture of M365 guidance – where to save, how to share
- Robust training and user support program
- Close working relationship with IT



# Actions You Can Take if You're Just Getting Started

Start with the foundations:

- Email management policy
- Discuss technical options with IT
- Identify your ideal future state



# Actions You Can Take if You've Got the Foundation Down



- Look for opportunities for progress (even if they're not perfect)
- Build on what you've got
- Keep reminding your users that you exist and you're a resource to them



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# Q&A

Your turn!



# Thank you!

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