



Office of the Common Council - City Clerk
City Records Center

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Bradley Houston
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TO: Department Heads
FROM: Brad Houston, City Records Officer
RE: Data Retention Policies for Microsoft 365 and DocuSign

January 6, 2022

At its December 9, 2021 meeting, the City Information Management Committee (CIMC) approved in principle two data retention policies, one for data created and maintained within the Microsoft 365 environment (including SharePoint, Teams, and OneDrive for business) and one for forms and envelopes sent through the DocuSign electronic signatures platforms. Both of these data environments provide significant collaboration, workflow, and logistics support to departments across the City of Milwaukee, but also present significant challenges with management, maintenance, and disposition of the records they produce and store. These two policies, then, are intended to provide a framework for City Departments to effectively manage the records under their control within these systems, while helping the City as a whole comply with public records laws and regulations.

Because of the wide scope of both of these policies, CIMC is seeking broad feedback from end users before recommending adoption of these documents by the Common Council. Please review these documents to help the Committee determine how well they meet your departments' operational needs for working with and managing these records. The committee is particularly interested in learning about the practicability of some of the retention aspects of these policies, including automatic disposition of Teams records and completed DocuSign envelopes, and the control, ownership, and export of forms to E-Vault or other secure storage

If your department has been identified as a heavy user of either system, I will reach out to you individually under separate cover to discuss questions, comments, or concerns you have about these documents. That said, please feel free to contact me if you have questions about these documents otherwise. Please provide any and all feedback to me via phone or email by **February 7, 2022** to ensure it is taken into consideration for the CIMC's March 2022 meeting.

Thank you all in advance for your help. I look forward to your responses.

Sincerely,

A handwritten signature in black ink that reads "Bradley N. Houston".

Brad Houston
City Records Officer



cc: Jim Owczarski