SUNSHINE ORDINANCE TASK FORCE

Compliance and Amendments Committee
AGENDA PACKET CONTENTS LIST*

☒   **Continued discussion re developing recommendations on the document retention policy of City departments and Board of Supervisors.**

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Completed by: **Chris Rustom**   **Date:**   **Oct. 3, 2008**

*This list reflects the explanatory documents provided

~ Late Agenda Items (documents received too late for distribution to the Task Force Members)

** The document this form replaces exceeds 25 pages and will therefore not be copied for the packet. The original document is in the file kept by the Administrator, and may be viewed in its entirety by the Task Force, or any member of the public upon request at City Hall, Room 244.

Agenda Packet Checklist

"Kimo Crossman"
<kimo@webnetic.net>

09/25/2008 02:17 PM

To <elc@lrolaw.com>, "'SOTF'" <sotf@sfgov.org>, "'Richard Knee'" <rak0408@earthlink.net>, "'Allen Grossman'" <grossman356@mac.com>, "'Kristin Murphy Chu'" <home@prosf.org>, "'Christian Holmer'" <mail@csrsf.com>,

cc "'Wayne Lanier'" <w_lanier@pacbell.net>, <libraryusers2004@yahoo.com>, "'James Chaffee'"

bcc

Subject Recommendation to CAC SOTF re email and digital document preservation/online access (Revised)

(Based on further research, here are my revised recommendations)

SOTF Admin -- please make this part of the meeting packet for the continued item from last CAC about electronic record retention for SOTF.

9/25/08

Dear CAC SOTF

I would strongly recommend the taskforce immediately adopt a long overdue policy of online transparency and efficiency as envisioned in 67.21-1 (online efficient access) and 67.29-2 (make as many records online as possible).

I propose a policy similar to the Palo Alto and pending San Jose one and which I extended in my recent cover story *More sunshine -- easily and at no cost*
Technology can allow the city to take a huge step forward in public access -- right now 3/12/08
San Francisco Bay Guardian http://www.sfbg.com/entry.php?entry_id=5872

I recommend creation of an <u>online access copies</u> (but not necessarily online archive) which allows contemporaneous monitoring of SOTF Communications by subscribers and full search engine features.

A copy of any email received to the <u>SOTF@sfgov.org</u> email box should automatically be forwarded to a free Google email group (http://groups.google.com/) set up as an online access copy of the task force communications. These groups are fully text searchable and can handle email attachments. Lotus Notes used by the city allows one to set a rule on an email box to do this automatic forwarding -- much like an Out of Office or On Vacation message many are accustomed to seeing today. Additionally the SOTF Administrator should be instructed in writing to Carbon Copy any emails sent from the <u>SOTF@sfgov.org</u> email box or from other email accounts that relate to SOTF business to this same Google group.

These groups are reliable, a well tested system used by millions today and have no capacity limits. Additionally, they support RSS feeds (pull model) and email subscriptions (push model) which would allow any interested member of the public, non profits or news media to receive an instant copy of any new activity -- or a digest mode can be set to receive activity for the day in

one email. Since the city has free WiFi in many locations and free computer access in library branches – this allows those without computers near real-time access.

Lastly, there should be an encouragement on the SOTF website and on the footer of each the SOTF email that all submissions be submitted in email with born digital documents. (Word. Email, PowerPoint etc.) rather than faxed or paper forms or documents.

"PDF/A" is now the strong standard for long term preservation of digital documents.
http://www.pdfa.org/doku.php?id=pdfa:en

The SOTF shall adopt a policy that all digital documents received shall be converted to "PDF/A" or the most recently adopted ISO standard for preservation while retaining the original format.

Documents created by the SOTF shall be born digitally and posted/emailed with their native format with metadata and their PDF equivalent except in unusual in cases in which it is demonsratably unfeasible requiring significant effort. This provision is designed to limit the use of paper documents to make access more difficult or costly and achieve ADA compliance. Scan/OCR processing for received Faxes and other Paper documents should also result in a PDF/A version with OCR text. In either scenario: born digital or not, the resulting PDF with text and born digital document with PDF shall be emailed to the Google group within 1 business day of receipt.

The Fax machine used by SOTF shall be one which can receive faxes digitally rather than printing to paper – this will save a scanning step, be more reliable, waste no toner or paper and allows results in a higher quality fax and OCR conversion rate.

All documents and emails created related to SOTF by other city staff including legal counsel, and SOTF member discussions should Forwarded/Carbon Copied to the above described Google Group.

It shall be the policy of SOTF that all born digital documents used for meeting packets be assembled to preserve their utility as text searchable ADA compliant pages with SCAN/OCR processing for other documents . These packets will be emailed to the Google group for online access.

The SOTF shall have a retention policy of at least 5 years for all digital documents – likely by that time storage will be so cheap there will no longer be any need for a retention policy.

The SOTF shall have two full printed meeting packet binders and one set of communications received/sent since the last two full SOTF meetings at every SOTF Committee or Full meeting.

The SOTF shall digitally record every meeting with two different model/makes of digital recorders and post the digital content online at the city or other central website by 10am the following day.

The SOTF shall provide sufficient extension cords and electricity l for observer laptops and broadband internet access (preferably Wi-Fi) at a capacity to allow high quality video streaming at every meeting.