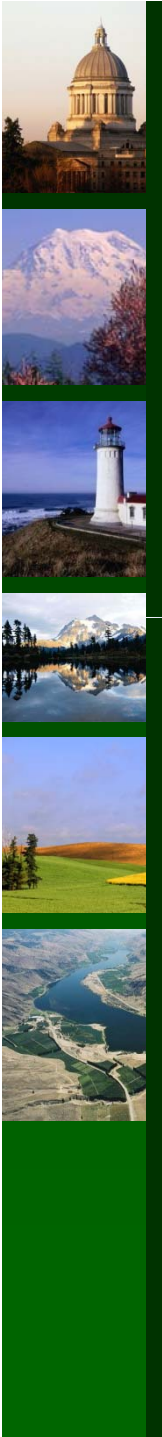




# Public Records Disclosure Tips and Tools For Electronic Records

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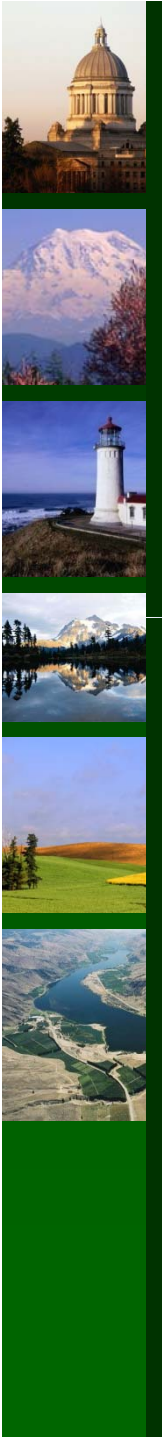
Informational Meeting – OB2 Auditorium  
March 5, 2009 – 3:00 – 4:30 PM



# Agenda

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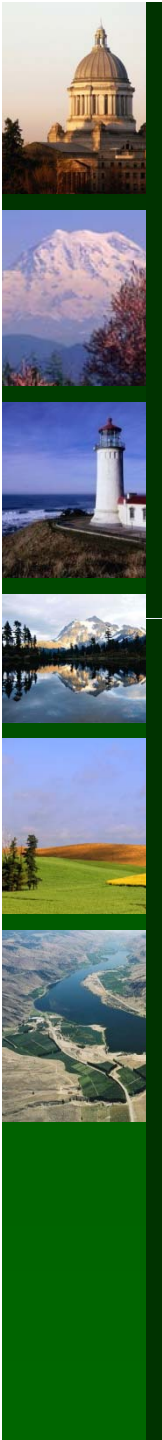
- Welcome
- Workgroup Purpose and Scope
- Workgroup Participants
- Deliverables – Tips and Tools
- How to get Involved
- Q & A



# Purpose


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- Develop tips and tools to help agencies:
  - Satisfy public records disclosure requests for electronic records in an electronic format
  - Respond in a way that is consistent, complete, timely, and cost effective



# Meet the challenges of open government in an electronic age

CHRISTINE O. GREGOIRE  
Governor



STATE OF WASHINGTON  
OFFICE OF THE GOVERNOR  
P.O. Box 40002 • Olympia, Washington 98504-0002 • (360) 753-6780 • [www.governor.wa.gov](http://www.governor.wa.gov)



September 18, 2007

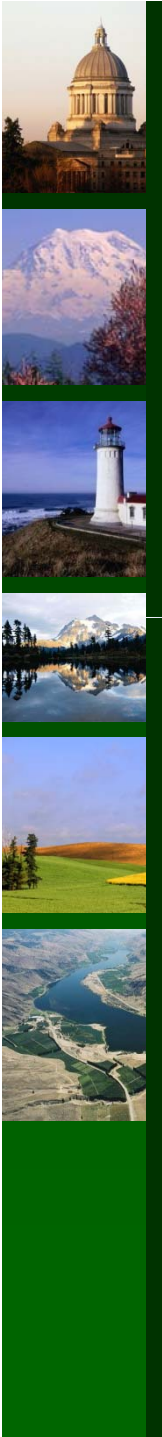
TO: State Agency Directors  
FROM: Governor Chris Gregoire *Chris*  
SUBJECT: Open Records/Public Records Act

I know you share my support for open government and our state's Public Records Act (Act). As more public records are available electronically, state agencies have an opportunity to work with people who request electronic copies of public records and, when possible, make electronic copies of non-exempt public records available in electronic format.

Numerous writers, scholars and lawyers have expressed views on the topic of production of electronic records. Very few states have addressed any aspect of this issue in their state public records laws. At least one court has ruled that Washington's Public Records Act does not require the production of electronic copies of non-exempt public records. Today, regardless of the technical requirements of the Act, I am asking all state agency public records officers to work with people who request electronic copies of non-exempt public records and, whenever possible, to satisfy these requests.

I know this will be new work and, in some cases, a new challenge for state agencies. To provide support, I am asking that the Department of Information Services designate a team to serve as a resource for state agency records officers and information technology departments, as they work to respond to these requests in the coming year.

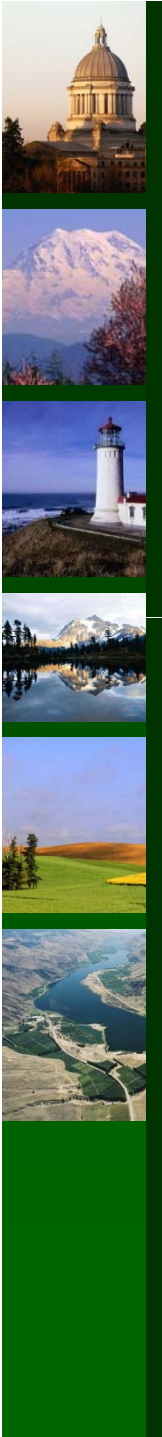
 



# Scope

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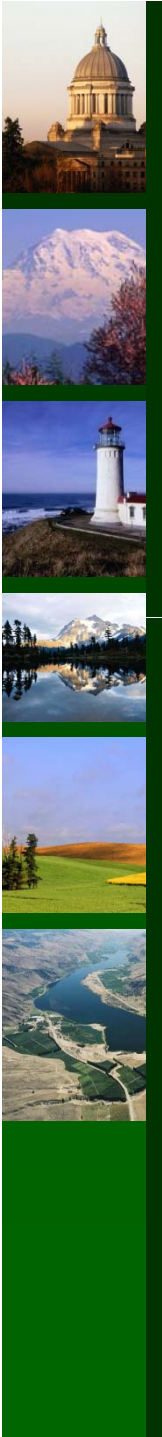
- Public records disclosure of electronic records
- Electronic records and electronic formats for release of records
- Develop tips and tools, rather than standards, to address diverse agency records
- Analyze current costs and the costs to produce electronic records in an electronic format
- Define common terminology



# Out of Scope

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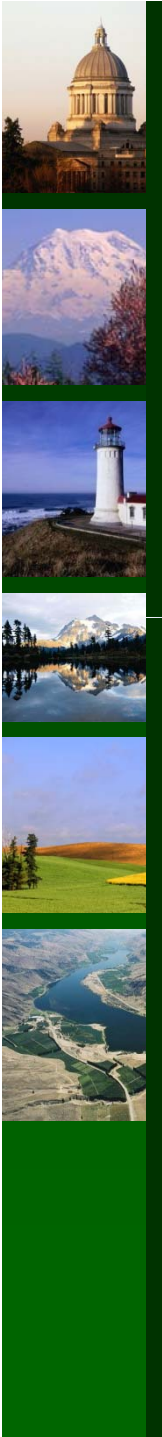
- Discovery
- Electronic Records Management



# Workgroup Participants

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- Department of Corrections
- Department of Ecology
- Department of Health
- Department of Information Services
- Department of Labor and Industries
- Department of Revenue
- Department of Social and Health Services
- General Administration
- Office of Attorney General
- Office of Financial Management
- Secretary of State
- Washington State Patrol

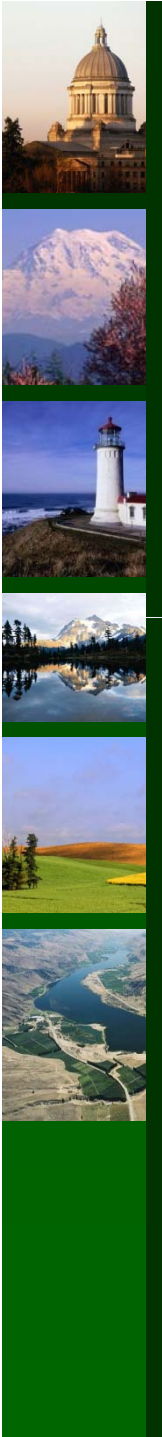


# Public Records Tool Box

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- What you'll find available at the Public Records Tool Box
  - Links to legal references
  - Tips and tools by topic area
  - Resources – sample forms, checklists, research, findings, and lessons learned

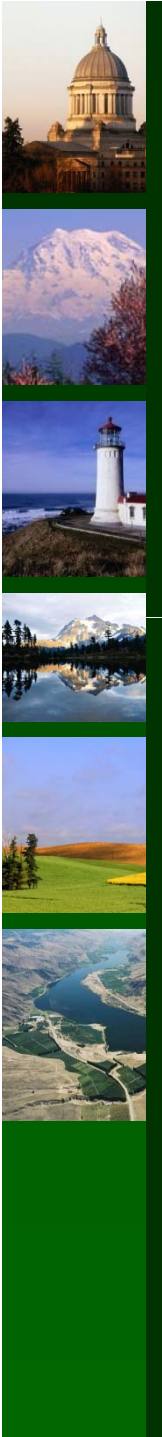
<http://www.ofm.wa.gov/rmd/records/default.asp>



# Tips and Tools Topic Areas

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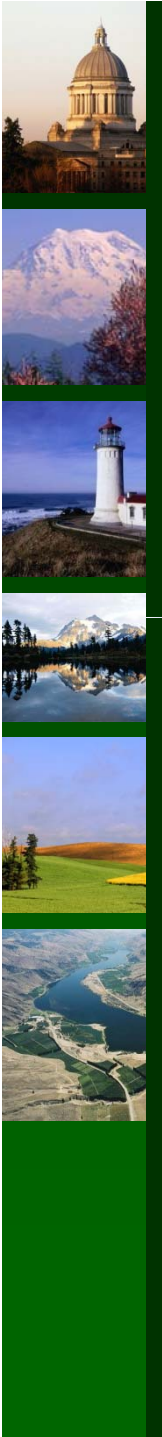
1. Receive and track requests
2. Checklist to analyze the request
3. Production considerations for the response
4. Preparing a response for exempt and non-exempt records
5. Communications with the requestor
6. Clarification



## Tips and Tools Topic Areas (cont.)

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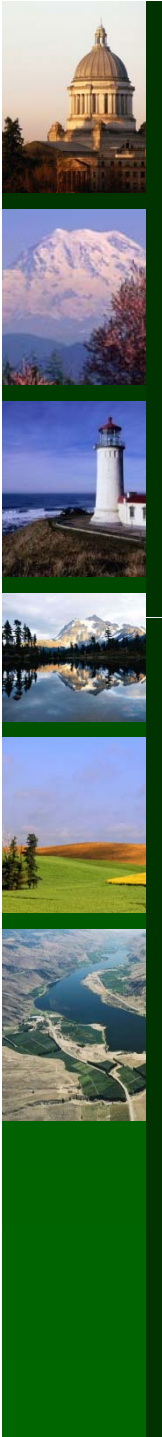
7. Routing the request
8. Search, identify, and assemble responsive records
9. Search checklist
10. Creating a new record
11. Disclosing IT security information
12. Redaction principles
13. Tips for electronic redaction



## Tips and Tools Topic Areas (cont.)

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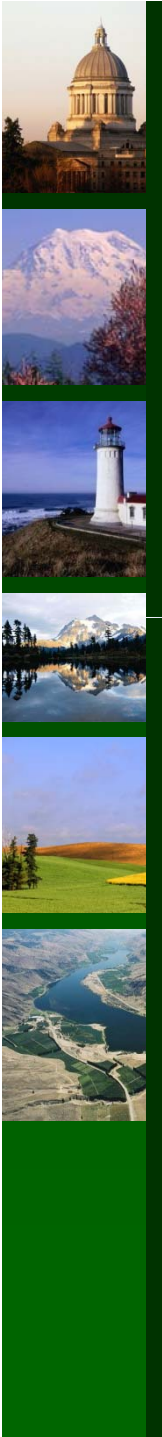
14. Redaction tool selection
15. Logging and indexing statutory exemptions
16. Documentation of the request
17. Delivering the response
18. Cost analysis
19. Document and implement lessons learned



# Process to Develop Tips and Tools

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1. Focus Groups draft the tip or tool
2. Core Team review and update
3. Work Group review and update
4. Distribute drafts of tips and tools for agency comment
5. Incorporate feedback from agencies
6. Post tips and tools to the Public Records Tool Box  
<http://www.ofm.wa.gov/rmd/records/default.asp>



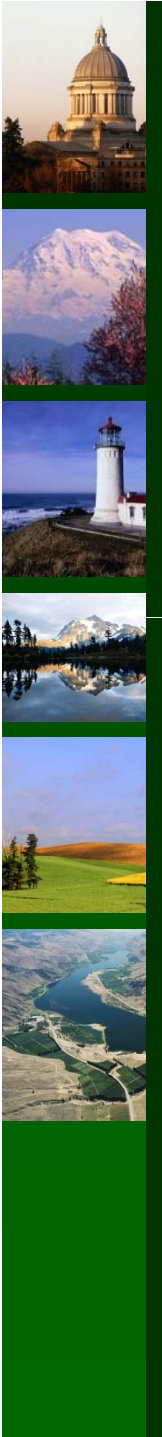
## How can you help?

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- Participate in a Focus Group to draft tips or tools
- Provide feedback on draft tips or tools
- Share resource materials

Send an email indicating how you would like to help to:

*PDworkgroup@dis.wa.gov*

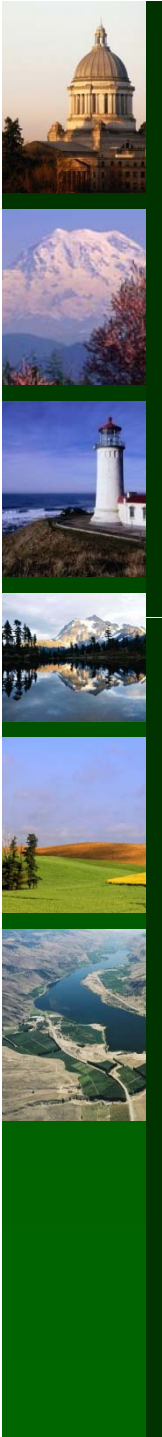


## Next Steps

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- Assign new volunteers to focus groups
- Schedule focus groups to draft tips and tools
- Follow the process to develop tips and tools
- Update the public records tool box @

<http://www.ofm.wa.gov/rmd/records/default.asp>

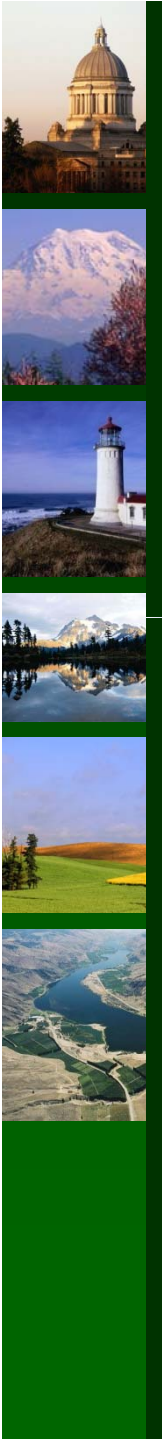


## Next Steps

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- Check for periodic updates to the Public Records Tool Box

<http://www.ofm.wa.gov/rmd/records/default.asp>



# Q & A

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