



Retention Policy for Separated Staff Email Accounts

Version 1.0 (2025)

1. Purpose

This policy provides a clear process for determining how long to retain the email accounts of former clergy, employees, volunteers, and contractors. It applies to Chancery, parish, and school staff, as well as outside IT support. Adapted from the federal Capstone approach, it aligns email retention with the role of the account owner.

2. Background

Under the Capstone model, email retention is based on the user's position. Some roles are designated for permanent retention due to their responsibility for mission-critical or policy decisions. Others are kept temporarily to meet legal and business needs, then deleted.

3. Email Retention Categories

At the end of employment/assignment, accounts should be classified and retained as follows:

Category	Description	Retention
Capstone Positions	<p>Chancery: Archbishop, bishops, chancellor, vicar general, CFO, CIO, office/program directors, direct assistants (2nd tier).</p> <p>Parishes: Pastors, Priest Moderators/Admins, Pastoral Coordinators, PAAs, program directors.</p> <p>Schools: Principals, vice principals, presidents.</p> <p>Note: Other accounts may be retained if they contain mission-critical or historically significant content.</p>	Permanent. Do not delete.
Mid-Level Staff	All others not in categories 1 or 3. Most staff will fall into this group.	Retain for 7 years.
Support, Admin, Facilities Staff	Non-supervisory roles performing clerical, manual, or transactional tasks.	Retain for 3 years.

4. Mailbox Cleanup Before Separation

All users are expected to regularly clean their mailboxes. The following should be deleted before departure:

- Non-work-related messages
- Routine scheduling or informational messages
- General announcements and invitations
- Transmittal emails (save the attachment if needed)
- External marketing or publications
- CC copies (unless you're the primary staff responsible)

Note: If an employee's departure is contested or involves unresolved HR or legal concerns, do not delete the account without consulting HR and Archives.

Questions? Contact: Archives@seattlearch.org