REPORT ON SMARSH ARCHIVING TECHNOLOGY RESEARCH

TO: MCHCD Board of Directors

FROM: Lee Finney, Chair

DATE: July 8, 2023

On June 26, 2023, I received a phone request from Director Spring to check out the potential benefits to the District of subscribing to SMARSH online archiving software. Director Spring indicated that she had spoken with SMARSH staff and believed that its technology would provide better records retention and capture to comply with CRPA requests or other needs. Due to Brown Act constraints, I did not also discuss SMARSH possibilities with the Secretary at this time.

I followed up with viewing short videos available on the SMARSH website and requested further information. I was contacted by SARMSH staff Claudia Haidel and Carrie Breedlove, Account Representative, who provided the attached Order Form outlining potential costs if the District subscribed to the email + attachments archiving service and the Microsoft 365 Sharepoint service containing other documents. My understanding of our conversation is summarized here:

SMARSH is primarily an archiving engine for many different kinds of data. For the archiving emails service, they will store for seven (7) years. Retention rules can be configured to meet the records retention policies of the District; all emails are indexed and nothing can be deleted or changed without Administrator approval; documents that are attachments will be included although other document capture would rely on an additional subscription to the Sharepoint service. SMARSH will not delete junk mail. Emails can be captured using their search function with keyword searches to quickly eliminate or include specific contents. All users must use the MCHCD email assigned to them to be included in the archive. SMARSH journals forward only so any emails already on the District's MS 365 could only be added to the archive at the rate of $10 per gigabyte of data. The subscription costs for either or both Email Archiving and Sharepoint Archiving is per user so Carrie's proposal includes five (5) users for now. Email and/or Sharepoint data will be captured into the archive automatically once setup and any designated user may have one or more levels of access to export emails and data. At present SMARSH exports into the original format or can export into a PDF Print, one page at a time. By the end of the year they expect to be able to export directly into complete PDF's. There is a platform fee = $850/year, a one time onboarding fee of $700 for each separate archive service purchased, email access per user = $85/year, 5 users = $425 for a total of $1275/year + $700 for the email service only. Carrie Breedlove's attached proposal includes the more expensive Sharepoint service for five (5) users as well.

I recommend that the Secretary, who has primary responsibility for records maintenance, be authorized to follow-up further with SMARSH and make a recommendation to the Board whether it would provide a valuable service or recommend an alternative. The Bylaws and Policies AD Hoc Committee should develop and present a Records Retention Policy as soon as possible.