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To: Michael Kurtz
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Subject: State: SMART

The SMART Working Group met on October 29, 2009. I attended for NARA. Lisa Haralampus and Tasha Thian represented IPS and Barry Fulton represented the SMART Program Office. We covered several items on the agenda. The following covers the most important points.

Smart Progress. Rollout continues. Five more posts have gone operational and by the end of this week, there will be another five more at the operational level. The SMART Program Office has a well-oiled procedure for roll-out at post, which takes about 2 weeks at larger posts. They tried a self-rollout, but the results were not good, so they have discontinued that. The SMART Steering Committee gave the "go" for total rollout on October 7, so the Department is now in the deployment phase. The proposed rollout for the Western Hemisphere bureau will take place very shortly and then there will be a "Thanksgiving pause" to check on scalability before moving forward with other bureaus.

Reaction. The SMART Program Office continues to survey its users. They read and analyze all comments, some of which have led to changes. IPS is looking at the "archive" and it is clear that people are using the record email function and people are promoting non-record email to record status when needed. They are still working on training issues to ensure proper and consistent implementation of the guidance.

Memos Issue. This is a huge issue on which there has been little progress. Some people are forwarding memos as attachments, but that leads to metadata problems. IPS is still running the Written Correspondence System (WCS) as part of the Archive. They are still working with the Executive Secretariat on the high-level memos issue. Earlier, it sounded like S/ES was going to rely on SMART, but it now appears that they will be establishing their own recordkeeping system as the follow-on to STARS.

The next meeting is scheduled for December 10, 2009.

CC: Brewer, Laurence; Carlson, Michael; Cummings, Ann; Lake, David; Lepore, Gregory; Margaret Hawkins; Steven Tilley