



Department of Commerce Executive Secretariat

Correspondence POC Meeting
Secretary's Conference Room
Thursday, September 17, 2009

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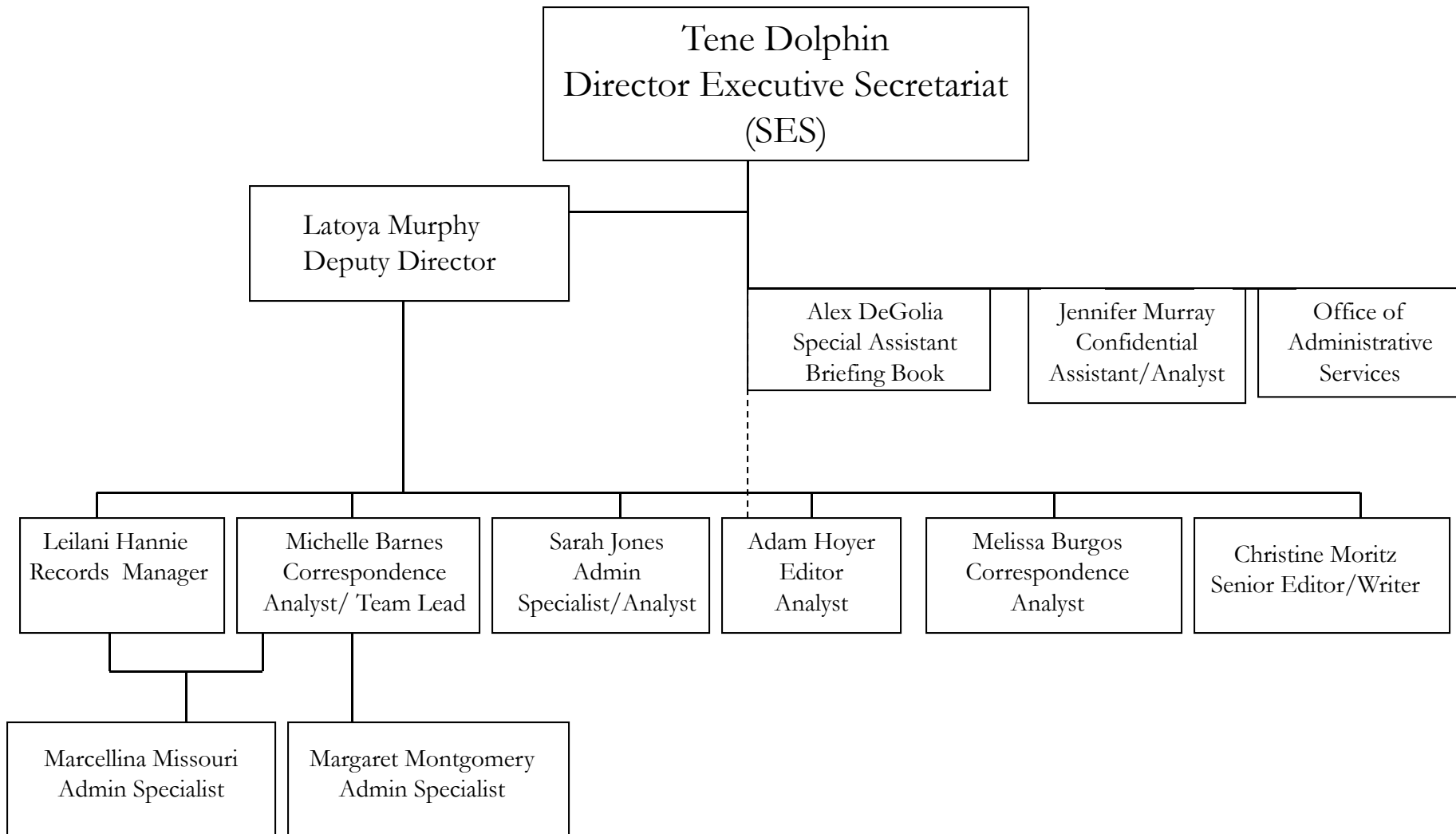


Introductions

Executive Secretariat



Executive Secretariat: Who we are...



Executive Secretariat

- What we do...
 - Correspondence
 - Invitations
 - Secretary/Deputy Secretary's email
 - Office of Administrative Services
 - Records Management, NSC
 - Secretary/Deputy Secretary Briefing Books
 - Secretary's Report
 - White House Report

Lifecycle of a Record: Front Desk

- Mail
 - Received, opened, date stamped, and sorted twice a day
 - WebDocFlow
 - Correspondent contact information entered
 - Incoming scanned
 - Correspondence divided evenly among analyst
 - Analyst
 - Correspondent contact information reviewed
 - Scanned image reviewed for clarity
 - Synopsis composed
 - Lead agency and FYIs assigned
 - Sent to Quality Control for final review
 - Quality Control reviews and releases to lead and FYI agencies
 - Lead agency reviews and drafts response
 - Signed cover memo, draft, and internal clearance sheet scanned as one package
 - Word document added to WebDocFlow
 - Assignment sent to ESCA (draft response attached)
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Lifecycle of a Record: Analyst

■ Exec Sec clearance process

- Exec Sec Clearance Sheet is prepared; draft response and internal clearance sheet is scanned into WebDocFlow
 - Assignments are created and sent to the clearing officials for clearance
 - After clearance process is completed analyst prepares final package and gives to Writer/Editor for editing and final preparation
 - If major changes are made during the clearing process it's returned to lead agency for rewrite
 - After completion of rewrite an assignment is sent to ESCA from Agency notifying of completion
 - Once cleared by officials rewrite is given to Writer/Editor for editing and final preparation
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Lifecycle of a Record: Editing

■ Procedure

- Correspondence received from analyst
- Edited for grammar, content, fact-checking
- Final product given to director for review

■ Essential Expectations

- Word Doc is attached in WebDocFlow
- Names, address line, titles are correct
- Timely responses to questions, update requests

■ See intranet update for helpful tools!

Lifecycle of a Record: Records

■ Creation

- Records are information assets, they hold value for the organization and capture the decision making process of an Administration
- Individual writes correspondence and sends to DOC
- Enter into WebDocFlow

■ Maintenance

- Assign correspondence to agency for action
- Document of history
- Write response, sign and mail to correspondent

■ Disposition

- Destroy or
 - Preserve for posterity
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WebDoc Flow

- **System Enhancements**
 - Spell Check
 - Automated Workflows
 - New servers
 - Remote access (Outside of DOC Support – 202-482-5612)
 - Scanning PDF current and future
- **Training** - Room 5022, 8:30 am until complete
 - Wednesday, October 21, 2009
 - Wednesday, November 18, 2009
 - Wednesday, December 16, 2009
 - Wednesday, January 20, 2010
 - Wednesday, February 17, 2010

Briefing Book: Important Points to Remember

■ Deadlines

- Memos are due two days before the event (by 5pm). The deadline is listed on the daily emailed chart.
- These are HARD deadlines. Briefings must be turned in, in final form.
- All material must be sent electronically. Paper copy is not necessary.

■ Policy Involvement

- When an OPSP staffer is listed in the daily chart under “Policy Lead,” it is YOUR responsibility to contact them immediately to involve them in drafting the paper.
- When the documents have been signed off on, name and phone number should be listed in the top “Contacts” section. Policy must sign off on the document before it is turned in as final.
- Check the daily chart daily for Policy Lead additions and other changes.

■ Font and Format of the Paper

- 12 point font, Times New Roman
- Do not change the format of the briefing template

■ Length of the Paper

- Keep the briefing memo to 2 pages and the attachments to one or two pages at the most. Attachments are not necessary if not applicable.

■ Remarks versus Talking Points

- Remarks are what the Secretary should read word for word. It’s a speech that he gives and should always be drafted by OPA in the Office of the Secretary.
- Talking points are information to help the Secretary reach the objectives of the meeting, not to be read word for word. Talking points should allow the Secretary to speak off-the-cuff to participants.
- You should be in constant contact with OPA about the remarks, from first draft to final.

Closing

- Expectations
 - Partnership
 - **Communicate** early, **Communicate** clearly, **Communicate** often
 - Correspondence Resource Guide
 - Additional Exec Sec procedures training
 - WebDocFlow training program
 - Updated POC list
 - Quality
 - Draft should be in the best possible shape BEFORE it reaches Exec Sec. The priority for Exec Sec editors should be to incorporate any changes received as a result of the clearance process. Before a draft reaches the Executive Secretariat:
 - Correct format
 - Check for grammar and spelling errors
 - Verify Names and addresses
 - Findings
 - When it comes to decision memos -Keep it simple.
 - Use auto-pen in rare occasions
 - Acronyms- should be well known to the audience, part of an effort to brand something or used by the recipient. Acronyms should always be introduced before used through out a document.

Resources

- ❑ Intranet re-launch: October
<http://home.commerce.gov/ExeSec/default.htm>
 - ❑ Webdoc Flow systems enhancements: November
 - ❑ Biannual POC meetings: January and June 2010
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