# OFFICE/REGION EXECUTIVE SUMMARY TEMPLATE

### This document is a template for creating your office/region's executive overview in preparation for the presidential transition. The information provided will be incorporated into final briefing materials for incoming leaders. Please adhere to the formatting and length-specific guidelines present throughout the template. If any of the subcomponents of this document require further explanation, use the deep-dive topic template provided to prepare an attachment to this overview.

# OFFICE/REGION NAME

OFFICE/REGION CHARACTERISTICS

What makes delivering the [agency name] mission in your office/region unique? For example – geography, infrastructure, environment, stakeholders, etc.

Type response here [limit to 150 words]

THREAT AND HAZARD CONTEXT

What are the top 3 to 5 threats and hazards facing the office/region? How do concerns about these threats and hazards have an impact on [agency]'s mission success? This is meant to be a prioritized list of concerns that may impact [agency name]'smission success.

Type response here [limit to 300 words]

OFFICE/REGION SNAPSHOT & MAJOR FUNCTIONS

In the table below, provide a high-level overview for your subunits. For each subunit, describe its major functions in bullets.

|  |  |
| --- | --- |
| Name | Overview |
| Type name of division 1 here. | Briefly describe major roles, responsibilities, and outcomes [limit to 40 words].   * **Branch 1:** Briefly describe function 1 [limit to 40 words]. * **Branch 2:** Briefly describe function 2 [limit to 40 words]. * **Branch 3:** Briefly describe function 3 [limit to 40 words]. |
| Type name of division 2 here. | Briefly describe major roles, responsibilities, and outcomes [limit to 40 words].   * **Branch 1:** Briefly describe function 1 [limit to 40 words]. * **Branch 2:** Briefly describe function 2 [limit to 40 words]. * **Branch 3:** Briefly describe function 3 [limit to 40 words]. |
| Type name of division 3 here. | Briefly describe major roles, responsibilities, and outcomes [limit to 40 words].   * **Branch 1:** Briefly describe function 1 [limit to 40 words]. * **Branch 2:** Briefly describe function 2 [limit to 40 words]. * **Branch 3:** Briefly describe function 3 [limit to 40 words]. |
| Type name of division x here. | Briefly describe major roles, responsibilities, and outcomes [limit to 40 words].   * **Branch 1:** Briefly describe function 1 [limit to 40 words]. * **Branch 2:** Briefly describe function 2 [limit to 40 words]. * **Branch 3:** Briefly describe function 3 [limit to 40 words]. |

CURRENT KEY INITIATIVES

What are your office/region’s key initiatives or projects? Explain why the initiative is important, and how it supports the achievement of the office/region’s key outcomes. Please do not list every initiative for each subunit.

|  |  |
| --- | --- |
| Name | Overview |
| Type name of initiative 1 here | Brief overview of initiative, why it’s important, and outcomes [limit to 60 words] |
| Type name of initiative 1 here | Brief overview of initiative, why it’s important, and outcomes [limit to 60 words] |

SPECIAL OFFICES AND CENTERS

Are there any special offices or centers reporting to your office/region? If so, what do they do and why are they important?

Type response here [limit to 200 words]

STRATEGIC ENVIRONMENT

Provide your top three issues/concerns that the next Secretary should be aware of. As you think of your top three, consider the following categories: threats/hazards (important drivers/trends), operational constraints/opportunities, mission execution risks (external), and key mission critical partnerships.

Type response here [limit to 300 words]

FUTURE DIRECTION

What are your office/region’s focus areas in FY17 and beyond? How will these upcoming focus areas help achieve the office/region’s mission and key outcomes? Please focus on the future direction at the office/region level, and not at the subunit level.

##### Type response here [limit to 200 words]

KEY CHALLENGES

What are the key challenges for office/region in FY17 and beyond? How might these affect the ability to deliver the mission? How is office/region addressing those challenges?

|  |  |
| --- | --- |
| Name | Overview |
| Type name of key challenge 1 here | Brief overview of initiative, why it’s important, and outcomes [limit to 100 words] |
| Type name of key challenge 2 here | Brief overview of initiative, why it’s important, and outcomes [limit to 100 words] |

PROMISING OPPORTUNITIES

What promising opportunities for achieving new goals or developing current initiatives should your office/region explore? Why? What would need to happen to realize their potential?

|  |  |
| --- | --- |
| Name | Overview |
| Type name of promising opportunity 1 here | Brief overview of opportunity, potential positive impact, and next steps [limit to 100 words] |
| Type name of promising opportunity 2 here | Brief overview of opportunity, potential positive impact, and next steps [limit to 100 words] |

KEY PARTNERS AND STAKEHOLDERS

Who helps you achieve your mission? What critical role do they have in ensuring we meet our agency outcomes? Why? Note any specific tie-in to Agency decision-making. Finally, what new key partnerships is your office/region actively developing, if any, and why?

1. Key Stakeholder 1
2. Key Stakeholder 2
3. Key Stakeholder 3

POINTS OF CONTACT

Provide two senior career officials as main points of contact.

|  |  |  |
| --- | --- | --- |
| Name | POC 1 | POC 2 |
| Title |  |  |
| Email |  |  |
| Phone |  |  |

### ORGANIZATIONAL STRUCTURE

Show us how your office/region is structured. The organizational chart should include the primary subunits within your office/region, e.g., divisions and branches. Don't include names or positions in the organizational chart, only business units.

Insert chart here

Why are you organized in your current structure? Is your organizational structure effective? Why so? What regulations limit your ability to change organizational structure?

Type response here [limit to 300 words]