Office/Region Briefing Template

EXECUTIVE SUMMARY

***Key audience****: Incoming appointees*

***Source****:* [*Agency Transition Guide*](https://presidentialtransition.org/transition-resources/agency-transition-guide/) *(chapter 2 - planning, appendix 2.6)*

*This document is a template for creating the executive overview for an agency’s office/region to be incorporated into final briefing materials for incoming leaders.* *If any of the subcomponents of this document require further explanation, use the deep-dive topic template provided* [***here***](https://presidentialtransition.org/transition-resources/resources-for-agency-leaders/)*.*

**OFFICE/REGION NAME:** [*Insert 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 three to five 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]’s mission success.

*Type response here [limit to 300 words]*

**Office/region snapshot and 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 4 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 bureau/component’s key initiatives or projects? Explain why the initiative is important, and how it supports the achievement of bureau/component’s key outcomes. Please do not list every initiative for each sub-unit.

|  |  |
| --- | --- |
| 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 2 here | Brief overview of initiative, why it’s important, and outcomes *[limit to 60 words]* |

**Special office 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 fiscal 2024 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 fiscal 2024 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 bureau/component explore? Why? What kinds of resources or support—such as additional funds, commitment from senior leaders, etc.—would you need to exploit these opportunities?

|  |  |
| --- | --- |
| Name | Overview |
| Type name of promising opportunity 1 here | Brief overview of opportunity, why it’s important, and outcomes *[limit to 150 words]* |
| Type name of promising opportunity 2 here | Brief overview of opportunity, why it’s important, and outcomes *[limit to 150 words]* |

**Key partners and stakeholders**

What key partners and stakeholders help you achieve your mission (key advisory boards, executive steering committees, and inter- or intra-agency stakeholder groups)? What critical roles do they have in ensuring you meet your agency outcomes? Why? Note any specific tie-in to agency decision- making. Finally, what new partnerships is the bureau/component actively developing, if any, and why?

1. Key Stakeholder *[limit to 100 words]*
2. Key Stakeholder *[limit to 100 words]*
3. Key Stakeholder *[limit to 100 words]*

**Points of contact:** Provide two 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]*