

Brief 25

Dealing with a series of papers – integrating the advice

Many papers are part of a series on the same topic – or a suite of papers on different aspects of a wider issue.

It's worth thinking carefully about how to streamline those pieces of advice and make sure they integrate with what has come before, and what is still to come. This can make the pieces of advice more effective, and avoid confusion and unnecessary re-litigation of decisions.

A stream of advice should build on what has gone before.

Decision-makers expect a stream of papers to build upon the papers that have gone before. So, the string should:

- Clearly reference previous papers, the advice contained in them, the discussion included and any decisions made. A 'reminder type' summary in the paper, with more detailed information available in an appendix works well.
- Explain what's in scope in this paper, and what's not (i.e. what's covered in other papers and what is beyond the limits of the overall advice stream).
- Clearly show where the new paper fits into the string, e.g. what has come before, and what is still to come.
- Make progress on resolving the issues.

Don't just repeat what has gone before

Just repeating the same advice isn't at all helpful and can be confusing at least, and rather annoying at worst.

New papers need to advance the thinking – possibly alongside new information.

Planned or unplanned...the basics remain

There is a difference between a planned stream of papers, and a more reactive one, that just happens.

In a significant and complex, but planned, stream of work, it's helpful to have an initial paper that lays out the papers to come in a logical order – essentially a project/work plan. Then each paper can clearly indicate how it fits with the planned stream. A diagram or timeline can be used to show this sequencing, with the current paper highlighted within the overview picture.

This can be particularly useful when the stream of advice evolves over time, e.g. initial advice; approval of a consultation paper and strategy; reporting on the results of the consultation; final decisions; then Bylaws, or Plan Changes.

The SmartArt options in Microsoft are an easy and practical way to do this.

While this isn't possible with a reactive series of papers, the context still needs to be properly covered. A reactive series is often about decision-makers requiring:

- Further information on a topic or issue to enable a decision to be made.
- A more detailed examination of a critical point or even having the issues explained in a different way.
- Coverage of a developing situation in which new information is becoming available to decision-makers.

Use the same framework

It is helpful for decision-makers if the same analytical framework can be used in each paper. This helps to create a common understanding of the issue between advisors and decision-makers. It also ties the string of advice together and helps reader regain the picture they had at the end of the previous brief.

Use the same data

Make sure the information and data and, importantly, the analytical approach is consistent from paper to paper. Again, this makes the task of bringing the reader back up to speed easier as the material is familiar, and it provides comfort by using a standard framework.

Of course, later papers might have updated information, or more in-depth data. If this differs from that contained in the original advice the differences will need to be explained and the consequences sketched.

Use common terminology

It's best to use the same technical terminology through the suite of papers. Changing terms can lead Minister/s to wonder if you are talking about something else!

A good idea is to develop a glossary of common terms, so that they are used consistently by all authors writing papers in the series or suite of papers.

Try different techniques to present early advice

While we have stressed the need to be consistent, it's worth trying different techniques to present early advice for discussion and guidance from decision-makers – especially if you are doing this in a workshop-type process. Many use A3s or PowerPoint reports/slide packs for this purpose.

These allow you a bit more freedom to put forward information and analysis in different ways, e.g. infographics, diagrams, table etc. This can make for a good discussion with or between decision-makers and allows the topic to be looked at from different perspectives.

This can then be followed up with more decision-focused papers, with formal recommendations.

Papers should properly reference previous decisions and advice

This is critical. It puts clear markers in the ground about what has gone before, explains the starting point of the analysis, and assumptions behind the current advice.

Remember to reference Council decisions properly and include hyperlinks to earlier advice so Councillors can access it easily.

You need to use your judgement about the level of detail needed.

On one hand if there is a long history to the issue, it is worth an appendix which sets out the timeline¹ and impact of previous decisions, with just a short summary in the body of the paper.

At the other end of the spectrum, if it's a topical issue that the Council knows well and has dealt with recently, then you can be very succinct.

You can change tack during the process

We've all been involved in processes where the advice changes and evolves over time. This could be due to new information, or the results of consultation and engagement.

If this is the case, be very explicit about the change/s of direction, and explain what it might mean for previous decisions, as well as the current decision.

For example, it maybe that previous decisions need to be changed or rescinded. This will require careful wording to make sure the record of decisions remains correct. Your Council/Council Committee secretaries should be able to give the best advice about how to do this.

It can be tricky, so take the time to plan carefully

It can be tricky to manage producing a stream of advice papers.

Getting the balance right between enough detail on what has gone before to set the foundation, the issue at hand, and then next steps is a judgement call.

Re-litigation and confusion often rear their heads.

Take time to plan each step of the process. And listen carefully to the feedback given, as it will help set the tone for the next paper in the series.

¹ Consider using a timeline tool e.g. one of the templates in Microsoft Office <https://templates.office.com/en-us/timelines>

This paper was written by at NZIER, August 2020. For further information, please contact anyone from our policy advice team:

Cathy Scott at cathy.scott@nzier.org.nz;

Todd Krieble at todd.krieble@nzier.org.nzJohn

Yeabsley at john.yeabsley@nzier.org.nz

NZIER | (04) 472 1880 | econ@nzier.org.nz

While NZIER will use all reasonable endeavours in undertaking contract research and producing reports to ensure the information is as accurate as practicable, the Institute, its contributors, employees, and Board shall not be liable (whether in contract, tort (including negligence), equity or on any other basis) for any loss or damage sustained by any person relying on such work whatever the cause of such loss or damage.