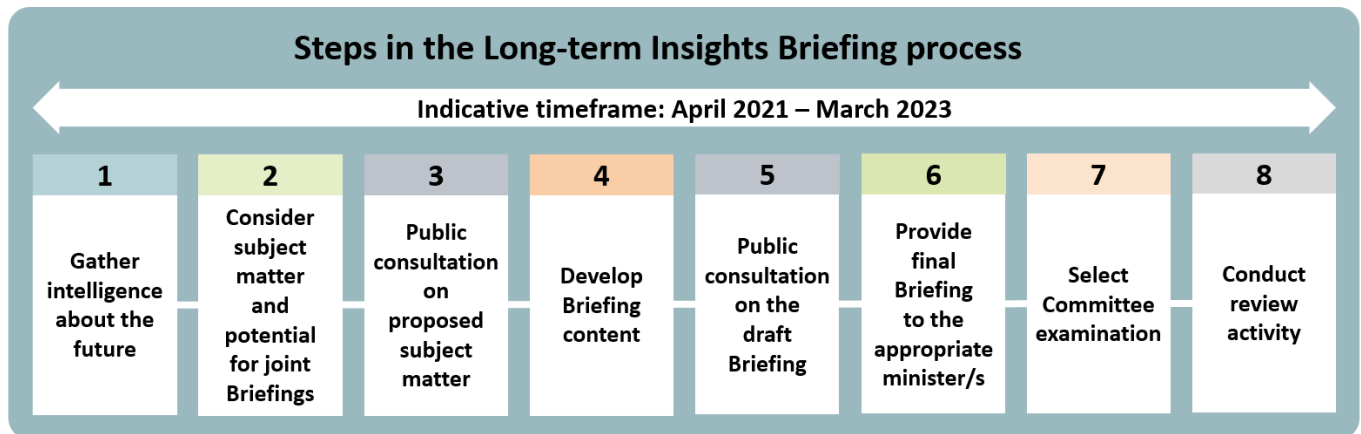


# LONG-TERM INSIGHTS BRIEFINGS Checklist



This Checklist is intended to assist departments to develop the Long-term Insights Briefings (Briefings). It provides a list of questions based on good practice to consider when working through each of the eight steps of the Briefings process.



In addition to using this checklist, Departments may also benefit from those leading Briefings development across the public service keeping in touch with one another. To facilitate that, the Policy Project has set up a Microsoft Teams group on Long-term Insights Briefings that departments can join. The purpose of the group is to share information relevant to undertaking the Briefings process, and to connect people in other departments who are developing the Briefings, so they can learn from and support one another. To join the Microsoft Teams group, email [policy.project@dpmc.govt.nz](mailto:policy.project@dpmc.govt.nz).

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## STEP 1 – GATHER INTELLIGENCE ABOUT THE FUTURE

- Have we conducted a wide examination of the context, and explored a diversity of information and viewpoints about medium and long-term trends, opportunities and risks? For example, does the information considered:
  - Cover the broader context, as well as issues immediately relevant to my department's functions?
  - Come from a diversity of information sources (e.g. quantitative data, qualitative data, grey literature and stakeholder insights)?
  - Reveal a diversity of viewpoints (including drawing on perspectives from outside the public service, and covering the Treaty of Waitangi context)?
  - Cover new and emerging issues? Or just the well-known trends?
- Have we pulled together the information our department already holds that will help us in identifying future trends, risks, and opportunities? What about insights from previous engagements our department or others have conducted with Māori, population groups and other stakeholder groups?<sup>1</sup>
- How can we address any gaps in the information we've pulled together? Consider the potential information sources on future trends, risks and opportunities in Annex A.
- Who can we talk to outside of our department?
  - For example, Crown entities related to our department's functions, advisory groups, or subject matter experts?
  - Have we also considered engaging with Treaty partners in ways consistent with the role of iwi, hapū and whānau, to inform the selection of subject matter, and factored that into timing considerations in our plan?
  - Have we considered engaging with different population groups and other stakeholder-groups that should be a particular focus given the subject matter being considered?
- Have we considered using futures thinking techniques? If capability building in this area is needed:
  - Refer to the futures thinking content on the Policy Project website
  - Contact the public sector community of practice on futures thinking – the Strategic Futures Group. This group builds foresight capability and shares its foresight work on public sector activities. Contact [cathy.swanson@ird.govt.nz](mailto:cathy.swanson@ird.govt.nz).
- Have we put in place strategies to address any bias and test our assumptions? Refer to Behavioural Government from the Behavioural Insights Team for some possible strategies to apply.

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<sup>1</sup> When re-using information gained from previous engagements, be cautious about assuming this reflects current views, especially if significant time has elapsed since community input from engagement has been obtained, or if the issue previously consulted on differs from the focus of a Briefing.

## STEP 2 – CONSIDER SUBJECT MATTER AND POTENTIAL FOR JOINT BRIEFINGS

- Have we referred to the guidance in the [Long-term Insights Briefings High-level overview](#)? It includes criteria in Annex A that can assist in making judgements about the subject matter for the Briefing.
- Have we clearly scoped the proposed subject matter and decided on boundaries between related or overlapping issues? Most long-term issues overlap, and the subject matter will quickly become unmanageable unless clear boundaries are determined.
- Have we decided whether to consult on a range of possible Briefing subject matters, or on a single proposed topic – depending on what we learned in Step 1 and departmental judgement?
- Have we considered the range of Māori interests (iwi, hapū, whānau, Māori organisations, Treaty settlements and customary rights and interests, and other Māori interests) – and the perspectives of different population groups and other stakeholder groups – in the possible subject matter?<sup>2</sup>
- Have we ring-fenced sufficient resources and established the project team with the capabilities we need for developing the Briefing?
- For joint Briefings across departments: Have we agreed the governance arrangements for working together?

## STEP 3 – PUBLIC CONSULTATION ON PROPOSED SUBJECT MATTER

- Have we provided any website links and information on the consultation activities by [email to Te Kawa Mataaho](#)? Its website is the central location where the public can find all information related to the Briefings, and it brings together links to relevant departments' websites on the Briefings.
- For joint Briefings across departments: Have we decided where public information on the Briefing will be primarily housed? Will one department's website be used as the primary source or all websites of the contributing departments (as well as the Te Kawa Mataaho website)?
- Have we considered the high-level design for our engagement on Briefing subject matter? Refer to the Policy Project's good practice guides on community engagement, particularly the [Community Engagement Design Tool](#).
- From the high-level design, have we developed the detailed plan for the engagement on Briefing subject matter? This includes who to engage with, how (using what engagement methods), where and when.
- Have we considered immersive experiences that can help people think about the future and move beyond present assumptions and lenses through which they view the world? For more information, refer to Nesta's [Our futures: by the people, for the people](#).
- Have we considered the extent to which engagement on subject matter with iwi, hapū, whānau, Māori organisations, and other Māori interests should occur?

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<sup>2</sup> Some of the groups making up the New Zealand population include iwi Māori, Pacific peoples, other ethnically diverse groups, disabled people, women, rainbow communities, religious communities, children and youth, and seniors. This is not meant to be an exhaustive list.

- Refer to the engagement framework and guidance by Te Arawhiti for help in determining the appropriate level of engagement with iwi Māori.
- Consider the range of networks we already have that engage iwi and other Māori interests as a starting point.
- Have we considered how we'll consult the different population groups or other stakeholder groups that are likely to have an interest in or be potentially affected by the subject matter proposed for the Briefing? To assist with this:
  - Refer to the Policy Project's Guide to Inclusive Community Engagement – this provides links to population agencies with connections to diverse population groups and the tools they have developed to support inclusive engagement.<sup>3</sup>
  - Apply the thinking process and analysis questions identified in the Policy Project's Community Engagement Design Tool – In section 3.6 'People: understanding needs and perspectives' and the 'Analysis questions for the people design factor' in Table 3.
- Have we considered drawing out the voices of young people, particularly when discussing issues that have intergenerational implications for wellbeing?
- Have we sought advice or assistance from population agencies to ensure that the groups they focus on are able to participate in our consultation processes? Have we considered the accessibility of the consultation materials for different population groups and other stakeholder groups?
- Have we allocated sufficient resources and time for communication and undertaking consultation on the subject matter for the Briefing?
- Have we spoken to other departments to consider when and how they're planning to engage with their stakeholder groups and Māori on the Briefing, to sequence and schedule our engagement? There may be opportunities to combine our engagement processes on the Briefing with those of other departments where it makes sense. Have we used the Microsoft Teams group to explore this?
- Have we considered the messaging in Annex B that departments can use as a starting point to adapt for their communities when communicating on the Briefing?
- Have we briefed the appropriate minister or ministers before consultation on our Briefings subject matter, in keeping with the 'no surprises' principle – while making it clear this is solely for their minister/s information?

## STEP 4 – DEVELOP BRIEFING CONTENT

- Have we allocated sufficient resources and time for the deeper exploration of the subject matter? What about for developing and drafting the Briefing?
- Have we considered the role of the various Māori interests in developing the content of the Briefing and factored in timing considerations as part of our planning? Is there a case for co-drafting a briefing with iwi Māori? In particular, have we considered:
  - The interests of iwi, hapū, whānau, Māori organisations, and other Māori interests (including as people of New Zealand)?

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<sup>3</sup> The Policy Project's Guide to Inclusive Community Engagement include links to population agencies with connections to iwi Māori, Pacific peoples, other ethnically diverse groups, disabled people, women, rainbow communities, rural communities, children and youth, and seniors.

- Treaty interests (including Treaty settlements and customary rights and interests)?
- What matters to Māori about the future, including the impact on outcomes that affect them and their aspirations and needs?
- Māori tikanga or mātauranga Māori at play?
- Have we explicitly considered the implications of the Briefing content for population groups and other stakeholder groups?
- Have we considered good practice for long-term thinking? For example:
  - Have we gathered information from a diversity of sources? Do they reveal a diversity of viewpoints and include perspectives from outside the public service?
  - Have we used several techniques for exploring the future, rather than relying on just one?
  - What are the current assumptions about the subject matter? Which assumptions are most robust across the range of future conditions?
  - Has our exploration sufficiently revealed the key elements in the system you're investigating? How are they evolving and interacting?
  - Have we identified the strengths and weaknesses of policy options against the context of future conditions?
  - Where there are competing perspectives about issues, opportunities and/or options, have we acknowledged the different perspectives and their implications?
  - Have we considered any limitations of the data, information and analysis?
  - Have we considered using futures thinking techniques? Refer to the futures thinking content on the Policy Project website, or contact the Strategic Futures Group via [cathy.swanson@ird.govt.nz](mailto:cathy.swanson@ird.govt.nz).
- Have we indicated a preferred policy option? If so, remove it. These Briefings are not advice.
- Have we put in place strategies to address any bias and test our assumptions? Refer to Behavioural Government from the Behavioural Insights Team for some strategies that could be applied.
- Have we considered the Briefing formats that will best suit the target audiences? What about innovative formats? Have we considered accessibility of the Briefing to different population groups and other stakeholder groups?

## STEP 5 – PUBLIC CONSULTATION ON THE DRAFT BRIEFING

- Have we provided any website links and information on the consultation activities by email to Te Kawa Mataaho? Its website is the central location where the public can find all information related to the Briefings, and it brings together links to relevant departments' websites on the Briefings.
- For joint Briefings across departments: Have we decided where public information on the Briefing will be primarily housed? Will one department's website be used as the primary source or all websites of the contributing departments (as well as the Te Kawa Mataaho website)?
- Have we considered the high-level design for the engagement on the draft Briefing? Refer to the Policy Project's good practice guides on community engagement, and in particular the Community Engagement Design Tool.

- From the high-level design, have we developed the detailed plan for the engagement? This includes who to engage with, how (using what engagement methods), where and when?
- Have we considered immersive experiences that can help people think about the future and move beyond present assumptions and lenses through which they view the world? For more information, refer to Nesta's [Our futures: by the people, for the people](#).
- Have we considered the extent to which engagement with iwi, hapū, whānau, Māori organisations, and other Māori interests should occur on the draft Briefing? As with earlier consultation on subject matter:
  - Refer to the [engagement framework and guidance](#) by Te Arawhiti for help determining the appropriate level of engagement with iwi Māori.
  - Consider the range of networks we already have that engage iwi Māori, hapū, whānau, Māori organisations and other Māori interests (including Māori as citizens) as a starting point.
- Have we considered how we'll consult the different community groups and other stakeholder groups that are likely to have an interest or be affected by the content of the draft Briefing? Refer to the Policy Project's [Guide to Inclusive Community Engagement](#), which provides links to population agencies with connections to diverse population groups and tools that support inclusive engagement.<sup>4</sup>
- Have we considered drawing out the voices of young people, particularly when discussing issues that have intergenerational implications on wellbeing?
- Have we sought advice or assistance from population agencies to ensure that the groups they focus on are able to participate in our consultation processes? Have we considered the accessibility of the consultation materials to different population groups and other stakeholder groups?
- Have we allocated sufficient resources and time for communication and undertaking consultation regarding the content of the draft Briefing?
- Have we spoken to other departments to consider when and how they're planning to engage with their stakeholder groups on their Briefings, to sequence and schedule our engagement? There may be opportunities for departments to combine engagement processes on more than one Briefing where it makes sense.
- Have we considered the messaging in Annex B that departments can use as a starting point to adapt for their communities when communicating on the Briefings?
- Have we briefed the appropriate minister or ministers before public consultation on the draft Briefing content, in keeping with the 'no surprises' principle – while making it clear this is solely for their minister/s information?

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<sup>4</sup> The Policy Project's [Guide to Inclusive Community Engagement](#) include links to population agencies with connections to iwi Māori, Pacific peoples, other ethnically diverse groups, disabled people, women, rainbow communities, religious communities, rural communities, children and youth, and seniors.

## STEP 6 – PROVIDE FINAL BRIEFING TO THE APPROPRIATE MINISTER/S

- Have we prepared our Briefing in accordance with the usual requirements for parliamentary papers? This includes the downloadable version of the paper being formatted, structured and tagged to increase accessibility.
- Have we identified and provided the Briefing to the appropriate minister/s?
  - An appropriate minister is a minister responsible for the relevant function of the department that relates to the Briefing. This is different to the Briefing being incidental to the minister's functions.
  - Where the scope of a Briefing is wide, there may be more than one appropriate Minister – and for joint briefings the relevant functions that appropriate Ministers are responsible for may be administered by more than one Department
- Have we promoted public awareness and understanding of the Briefing? This should only occur after the appropriate minister/s have presented the Briefing to Parliament. For example:
  - Have we allocated sufficient resources and time to communication and engagement activities after the Briefing is delivered to promote the long-term insights?
  - Have we promoted the Briefing within our department? For example – sent an all-staff email, placed it on the intranet, encouraged managers to run sessions with their staff on what the long-term insights mean for their work.
  - Have we promoted the Briefing with Māori, our stakeholders, and broader civil society? For example – run a launch event, sent the Briefing to interested people and organisations, held events to communicate the key insights?
  - Have we provided the website link to the published Briefing and information on any promotion activities by email to Te Kawa Mataaho? Its website is the central location where the public can find all information related to the Briefings, and it brings together links to relevant departments' websites on the Briefings.

## STEP 7 – SELECT COMMITTEE EXAMINATION

- Have we decided which officials will support the chief executive when they attend the Select Committee's examination, if departmental officials are called? For joint Briefings across departments, this may mean a joint team of officials representing more than one department.
- Have we prepared Briefing materials for the 'appropriate minister' if they are invited to appear at the Select Committee hearings on the Briefing?

## STEP 8 – CONDUCT REVIEW ACTIVITY

- Have we decided what type of review to conduct into the Briefing? What mix of internal or external resources will we use?
- Have we decided the scope of the review and the key questions to be answered? Some possible topics include:
  - Allocation and use of resources
  - How decisions were made on whether or not to work on a joint briefing
  - Governance arrangements, including for joint briefings
  - Information and data collection at step 1 and step 4
  - Process for selection of subject matter, including whether to consult on one proposed subject matter or a number of possible subject matters
  - Consultation and engagement with the public, māori, population groups and other stakeholder groups
  - Analysis and development of long-term insights
  - Format and design of the briefing products for communicating findings
  - Communication and promotion of the final products
  - Short-term impact of the briefing (e.g. On influencing public debate)
  - Workability of timing requirements
  - What, if any anything, should be done differently for the second round of briefings
  - Any matters that future guidance should incorporate or provide different advice on.
- Have we identified the key information sources for the review? Have we involved the key people from the project? If a joint Briefing was developed by multiple departments, ensure that all departments are represented when undertaking the review.
- Have we shared the review findings with all relevant internal and external stakeholders, including the Policy Project?



# Annex A:

## Potential information sources on future trends, risks and opportunities



This isn't a comprehensive list, but rather an indication of the different types of information sources that are available when conducting a wide examination into future trends, risks and opportunities. Not all sources will be relevant to all departments. Departments are also likely to have other information sources they use relevant to their specific roles and responsibilities.

### FUTURES THINKING REPORTS

- Futures thinking journals such as [Futures](#) and [Journal of Futures Studies](#).
- Futures centres that publish futures thinking insights on key areas, such as:
  - [Tokona Te Raki \(Māori Futures Collective\)](#)
  - [McGuinness Institute](#)
  - [Koi Tū: The Centre for Informed Futures](#)
  - [Stockholm Institute for Future Studies](#)
  - [Institute for the Future](#)
  - [Futures Centre](#)
  - [Policy Horizons Canada](#)
  - [Finland Futures Research Centre at the University of Turku](#)
  - [Copenhagen Institute for Futures Studies](#).

### SOURCES BY TYPE OF ORGANISATION

#### Ministers and/or agencies on their behalf

- Wellbeing Report – starting from 2022, the Minister of Finance must table a four-yearly report prepared by the Treasury, using indicators to describe the state of wellbeing now and over time, and its sustainability or risks (section 26NB, *Public Finance Act 1989*).
- Fiscal Strategy Report – yearly report by the Minister of Finance on long-term objectives over at least the next 10 years, as well as short-term intentions for the next three years (section 26I, *Public Finance Act 1989*).

#### Public sector and State Sector entities

- Long Term Fiscal Position Statement – prepared every four years by the Treasury. Provides a 40-year system view using projections, trends and modelling on fiscal policies (section 26N, *Public Finance Act 1989*).
- Strategic assessments by Ministry of Defence, the Ministry of Foreign Affairs and Trade and the National Assessments Bureau (e.g. Global Geo-Politics and State of the Multi-lateral System).

- Statistics New Zealand publishes a wide range of insights and data about New Zealand’s economy, society and environment at [www.stats.govt.nz](http://www.stats.govt.nz). For assistance, contact the Stats NZ Info Centre – [info@stats.govt.nz](mailto:info@stats.govt.nz) / 0508 525 525. For information on how to access the Integrated Data Infrastructure or Longitudinal Business Database, contact [access2microdata@stats.govt.nz](mailto:access2microdata@stats.govt.nz).
- Data, statistics and outlook trend analysis prepared by other departments, such as:
  - Ministry of Transport (e.g. household travel, public transport, domestic freight)
  - Ministry of Business, Innovation and Employment (e.g. National Science Challenges reports, New Zealand sectors dashboard, employment, tourism)
  - Ministry of Health (e.g. mental health, mortality, hospital event data)
  - the Treasury (e.g. Living Standards Framework Dashboard)
  - Ministry for the Environment (e.g. Environmental Reporting).
- Chief Science Advisor Forum – If your department doesn’t have a Science Advisor and you are looking for additional support, you may be able to access the expertise of the Chief Science Advisor Forum. Contact [pmcsa@auckland.ac.nz](mailto:pmcsa@auckland.ac.nz).
- Long-term investment plans – prepared by capital intensive agencies. Describes an agency’s investment journey over the next 10 years to support the agency and/or its sector’s long-term goals.
- Government entities with an explicit mandate to think long-term (e.g. Climate Change Commission, New Zealand Infrastructure Commission and New Zealand Productivity Commission). The Parliamentary Commissioner for the Environment also has a long-term mandate, although is an independent Officer of Parliament.
- Reports produced by population agencies on the needs, views and values of different population groups (e.g. Ministry for Pacific People’s Lalanga Fou provides preliminary information about the aspirations for Pacific peoples that can be re-used across departments).

## Māori

- Iwi and hapū strategies and reports (e.g. Ngāi Tahu 2025 vision, Te Arawa 2050 vision, Ngāi Whātua Ōrākei 2050 vision).
- Reports and other materials produced by the Waitangi Tribunal, including claims that are the subject of the forward agenda of the Waitangi Tribunal. In particular, materials relevant to Kaupapa Inquiries – Inquiries that deal with nationally significant issues affecting Māori as a whole.
- Academic research by Māori academics.
- Key themes from Māori news media over time.
- Content of Treaty settlements and related legislation, and related relationship instruments.
- Submissions by iwi, hapū and Māori organisations on relevant topics, as well as recent litigation in the courts.
- United Nations Declaration on the Rights of Indigenous Peoples – a comprehensive international human rights document on the rights of indigenous people.
- Whānau Ora Outcomes Framework – Whānau Ora is an approach that supports whānau and families to achieve their aspirations in life. The Whānau Ora Outcomes Framework is the principle instrument for indicating the success of Whānau Ora.
- An Indigenous Approach to the Living Standards Framework – the indigeneity lens on the Treasury’s Living Standards Framework.

- Emerging themes across the work of departments, for example breaking down silos to improve outcomes for Māori and efforts such as coordination on issues such as [Wai 262](#).
- Insights from departments' existing relationships with iwi, hapū, whānau and Māori organisations.

## Local government and other information sources

- Local authorities (e.g. Long-term Plans, Regional Policy Statements, Regional Plans, Infrastructure Strategies and other long-term strategies and plans required under various statutes).
- Research centres hosted by universities, such as:
  - [Institute for Governance and Policy Studies](#) (Victoria University of Wellington)
  - [Koi Tū: The Centre for Informed Futures](#) (University of Auckland)
  - [New Zealand Centre for Sustainable Cities](#) (University of Otago)
  - [Centre for Sustainability](#) (University of Otago).
- Academics who work on a particular topic.
- Non-governmental organisations and philanthropy.

## International community

- Reports by the United Nations, OECD, WHO, World Economic Forum and European Union (e.g. OECD publication [How's Life](#) that measures wellbeing, World Economic Forum's [Global Risks Report](#)).
- Reports on global trends (e.g. US National Intelligence Council's [Global Trends Report](#), UK Ministry of Defence [Global Strategic Trends](#), Ipsos [Global Trends Report](#), Deloitte [Beyond the Noise: The Megatrends of Tomorrow's World](#)).

# Annex B:

## Public messaging on the Long-term Insights Briefings



The following messaging has been developed as a starting point for departments to adapt for context when communicating on the Long-term Insights Briefings.

### **Why do the Briefings exist and what do they do?**

- We need to make sure that New Zealand considers and is ready for the future.
- In 2020, Parliament passed a law that requires government departments to produce Long-term Insights Briefings (Briefings) once every three years.
- The Briefings will help us collectively as a country to think about, and plan for, the future.
- They will identify and explore the long-term issues that matter for the future wellbeing of people in New Zealand.
- Each Briefing will explore a different topic – decided by the government department or departments, after community consultation.

### **Why should I get involved?**

- The future is everyone's responsibility, affecting us and future generations.
- Everyone can have their say on what topics the Briefings should cover.

### **What do I need to know?**

- Government departments will be seeking the community's feedback on what topics should be covered in the Briefings. They will also be seeking the community's feedback on the content and detail of the Briefing.
- The final Briefing will be published for everyone to access.

### **How will the Long-term Insights Briefings be used?**

- The Briefings are not current government policy.
- They will be developed independently of ministers.
- The Briefings are to provide information and insights that could be used in the future by anyone. For example, they may inform:
  - government agencies, their policy advice and the public services they deliver
  - government policy decisions and how they're implemented
  - the policies of political parties
  - the decisions and actions of local government
  - the decisions and actions of members of the public, iwi, businesses, and our wide range of other non-governmental organisations.

### **Why does this matter?**

- No one knows for sure what the world will be like in the future.
- The Briefings help us as a country to start thinking about the future and what will matter most for the long-term wellbeing of people in New Zealand.
- They will help all of us to make decisions about the future.

## Publication details

This product is the fourth in a suite of four Long-term Insights Briefings guidance resources:

### 1. **High-level overview**

This sets out the requirements on departmental chief executives to develop a Long-term Insights Briefing and recommendations for how these Briefings should best be developed. It includes guiding principles to support departments in making decisions that fully realise the potential benefits of the Briefings. It also includes criteria to assist departments in selecting the subject matter for a Briefing.

### 2. **The high-level development process (in A3 format)**

This sets out the high-level process and indicative timeframe for departments to follow in developing a Long-term Insights Briefing. There are eight high-level steps in the development process and each step consists of a number of activities.

### 3. **Detailed steps of the development process**

This provides guidance to support agencies in undertaking the necessary activities that form each of the eight steps in the development process for a Long-term Insights Briefing. It also provides their indicative timeframes.

### 4. **Checklist**

This provides a list of questions based on good practice for departments to consider during each step of the development process for a Long-term Insights Briefing. The checklist sets out practical actions that can be taken to develop and deliver a high-quality Briefing, and how to promote the long-term insights.

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