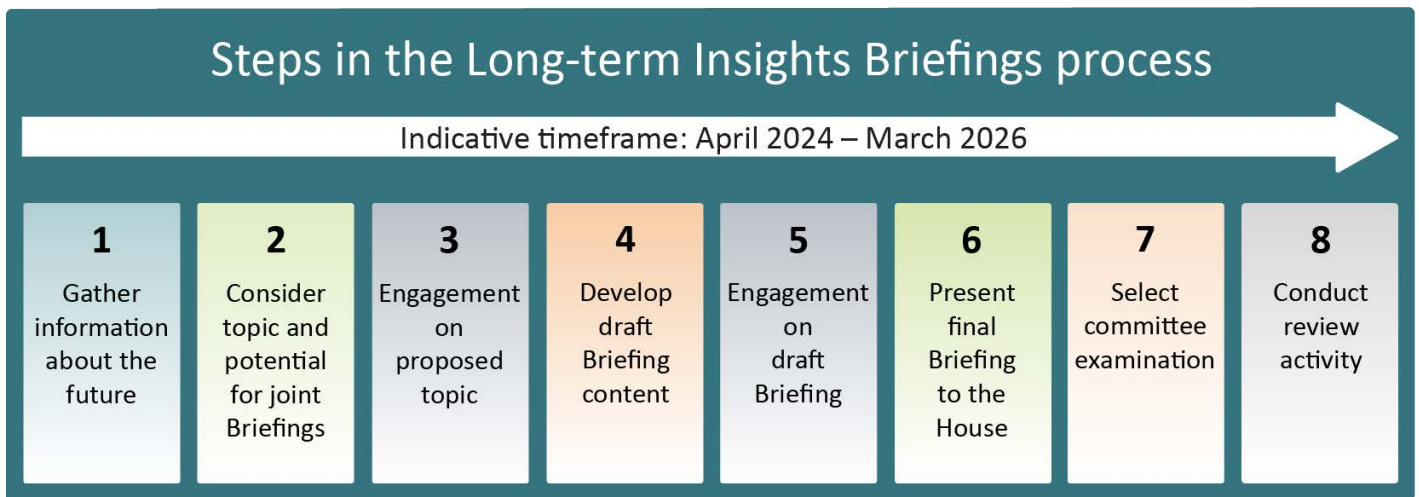


Long-term Insights Briefings Checklists



These checklists are designed to help departments develop their second Long-term Insights Briefing. They set out the key activities that form each of the eight steps in the Briefings process. These activities and actions are based on good practice and lessons learned from the first round of Briefings.



This product is first in a suite of three Long-term Insights Briefings guidance resources:

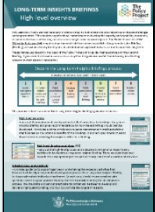
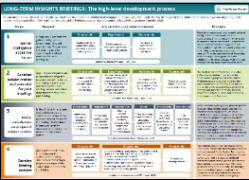
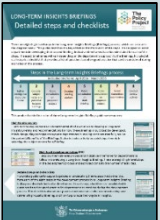
- A** **Long-term Insights Briefings: Process guide**
sets out the requirements on departmental chief executives to develop a Long-term Insights Briefing and gives recommendations for how they should best be developed. It includes principles to guide departments in making decisions that fully realise the potential benefits of the Briefings, and criteria to help in selecting the Briefing topic. 
- B** **Long-term Insights Briefings: Overview of steps**
sets out the high-level process and indicative timeframe for departments to follow in developing a Long-term Insights Briefing. This A3 display eight high-level steps in the development process, and each step consists of a number of activities. 
- C** **Long-term Insights Briefings: Checklists** — THIS DOCUMENT —
provides checklists with questions based on good practice for departments to consider during each of the eight steps in the development process. The checklists set 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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Publication details

Long-term Insights Briefings: Checklists was released in 2024 by the Policy Project. It replaces two of the guidance products released in August 2021 – *Long-term Insights Briefings: Detailed steps of the development process* and *Long-term Insights Briefings: Checklist*.

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The Briefings development process

The *Public Service Act 2020* (the Act) requires departmental chief executives to develop a Long-term Insights Briefing at least once every three years (Schedule 6, clauses 8 and 9). Key points are:

- The requirement to publish a Briefing is a statutory duty on departmental chief executives, independent of ministers. When developing the Briefing, the ‘no surprises’ principle still applies.¹
- Chief executives must provide a copy of the final Briefing to the appropriate portfolio minister, so the minister can present the Briefing to the House of Representatives as soon as practicable after receiving it.
- Chief executives select the Briefing’s topic. The Briefing’s purpose is to provide information in the public domain on future trends, risks, and opportunities relevant to the selected topic.
- The Briefings can look at policy options that respond to the trends, risks, and opportunities. They can also identify the strengths and weaknesses of policy options but must not indicate a preferred option.
- Individual chief executives may develop and sign off their own Briefing on a topic relevant to their department’s functions, or they may develop a joint Briefing with other chief executives.
- All Briefings should look out at least 10 years into the future to ensure their focus is beyond short term. Chief executives can select an upper limit for the timeframe of each Briefing that’s appropriate to the topic.
- The Briefing needs to appropriately consider Māori and Treaty of Waitangi interests. The same Treaty considerations that normally apply to the work of government departments also apply to the Briefings. The extent to which engagement with Māori occurs in developing the Briefing will depend on the department’s functions and the level of interest from Māori in the topic.
- At a minimum, the Act requires chief executives to engage with the public on the Briefing’s topic. Chief executives should consider whether the topic requires certain population and other stakeholder groups to be a focus of consultation.² This includes whether engagement with any groups or the wider public should exceed the Act’s minimum requirements, or occur more points in the process than required.
- Chief executives should produce their second Briefing in time for the appropriate minister to present it to Parliament by 30 June 2025. If this isn’t possible, chief executives should aim for as soon as practicable.

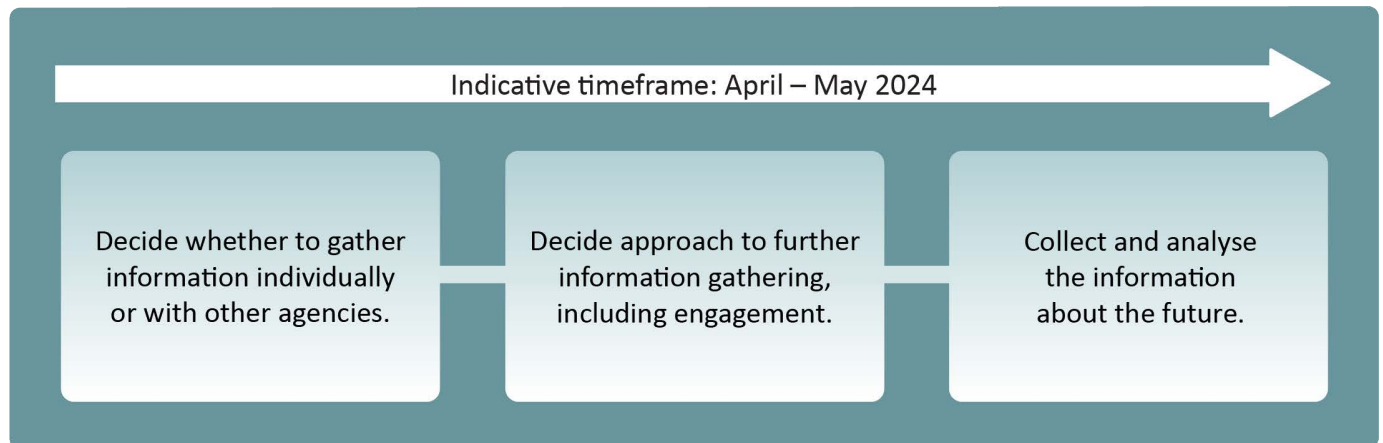
Checklist for getting started

- Have you established a Briefing delivery project team and budget as soon as possible? (ideally before the end of 2023 or early 2024)
- Are you realistic about timeframes? There will be unanticipated delays, so start work on the next Briefing as soon as possible.
- Are you continuing to invest in and grow your capabilities in futures and horizon scanning?
- If a joint Briefing is being delivered, have you:
 - established agreed levels of agency contribution (including budget and personnel) ahead of time?
 - agreed the governance and sign-out arrangements across agencies?

¹ Under the ‘no surprises’ principle, chief executives keep their ministers aware of significant or controversial matters, especially those that may arise in public, in the minister’s portfolio areas.

² Some of the groups in New Zealand include Māori, Pacific peoples, other ethnically diverse peoples, disabled people, women, rainbow communities, religious communities, children and youth, and seniors. This isn’t meant to be an exhaustive list, and the groups most relevant to consult with will vary for each Briefing.

Gather information about the future



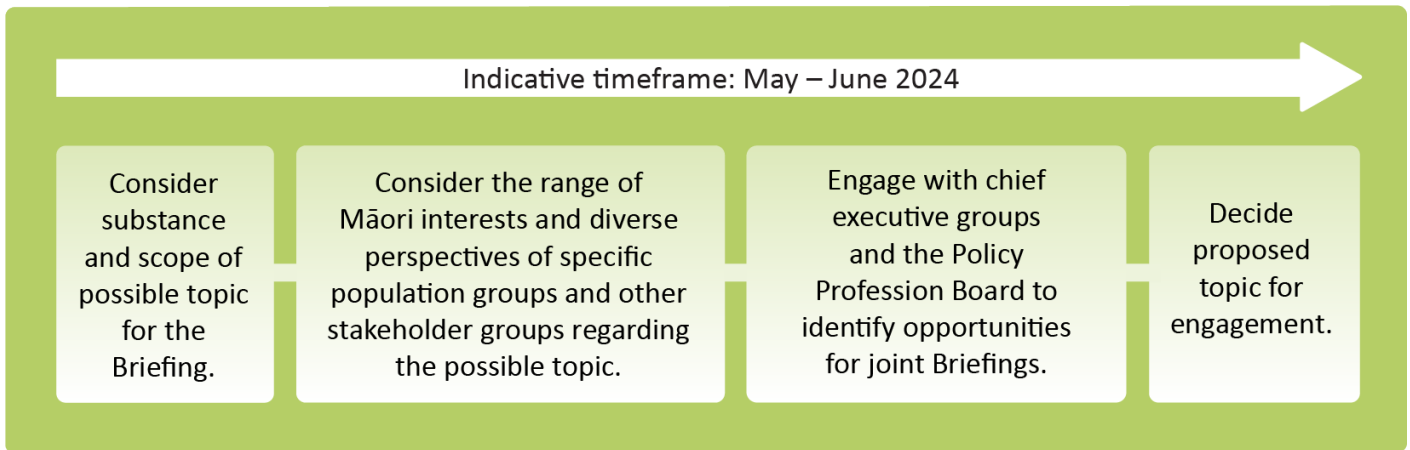
This information gathering will provide a firm basis in Step 2 for considering which topic to focus the Briefing on. Some departments may have recently gathered information that they may be able to reuse in Step 1.

Checklist for Step 1

- Have you 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 you pulled together the information your department already holds that will help you in identifying future trends, risks, and opportunities? What about insights from previous engagements your department or others have conducted with Māori, population groups and other stakeholder groups?³
- How can you address any gaps in the information we’ve pulled together? Consider the potential information sources in Annex C of [Long-term Insights Briefings: Process guide](#).
- Who can you talk to outside of your department? For example, have you:
 - talked to advisory groups, subject matter experts, and Crown entities?
 - considered engaging with Treaty partners in ways consistent with the role of iwi, hapū and whānau, to inform the selection of topic, and factored that into timing considerations in your plan?
 - considered engaging with different population groups and other stakeholder groups that should be a particular focus given the topic being considered?

³ 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.

- Have you 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.
- Have you put in place strategies to address any bias and test your assumptions? Refer to Behavioural Government from the Behavioural Insights Team for possible strategies to apply.
- Have you taken your ideas to the Policy Profession Board sessions that will be set up for agencies? These sessions will be for sharing and co-ordinating information and ideas for Briefing topics and approaches.
- Have you involved your Chief Science Advisor early on? Chief Science Advisors should be involved throughout the Briefing process, as well as other researchers and academics, where relevant.



Checklist for Step 2

- Have you clearly scoped the proposed topic and decided on boundaries between related or overlapping issues? Most long-term issues overlap, and the topic will quickly become unmanageable unless clear boundaries are determined.
- Have you decided whether to consult on a range of possible Briefing topics, or on a single proposed topic – depending on what you learned in Step 1 and departmental judgement?
- Have you 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 topic?
- Have you ring-fenced sufficient resources and established the project team with the capabilities you need for developing the Briefing?
- When working with other departments on Briefings, have you agreed which departments will sign off the joint Briefing and which departments will only contribute to part of the Briefing development process? Have you agreed the governance arrangements for working together?
- Have you provided support to ministers early so they can better understand the role and purpose of the Briefings and what their responsibilities are (and are not) in relation to these?
- Have you picked a Briefing topic that is focused but flexible?
- Have you sought advice from any chief executive groups on whether or not a joint Briefing would be appropriate? Have you checked your Briefing topic with them?
- Have you taken these same issues to the Policy Profession Board for advice?
- Have you carefully planned public engagement early? In particular, remember to:
 - identify engagement specialists
 - develop specific iwi/Māori engagement plans and processes early
 - collaborate with other government agencies who may be able to support connection to shared stakeholders and groups of interest
 - be mindful of engagement fatigue – wherever possible combining public engagement efforts to reduce pressure on staff and communities.

Criteria for selecting the Briefing topic

1. The topic has not yet received adequate consideration

The Briefings provide an opportunity to explore issues that are known but haven't received adequate consideration to date, as well as new and emerging issues that haven't yet been recognised. This may include a topic that has been identified previously, but not analysed. It may also include problems that develop gradually over time which means they attract little attention.

2. The topic is likely to have significant implications for the long-term wellbeing of people in New Zealand

The Briefings provide an opportunity to explore the issues that matter for the long-term wellbeing of people in Aotearoa New Zealand. This includes issues that impact the long-term distribution of wellbeing across people, places, and generations. To be long term, the issues should have the potential to endure over time or have implications that are likely to arise in the future. As a guide, when selecting the topic ask whether it's likely to affect wellbeing significantly at least 10 years into the future.

3. The topic can ordinarily be sufficiently distanced from current government policy when consulting the public

There is a risk of public confusion if, during the same time period, the department is consulting on a government policy topic, and similar topic in a Briefing. It's likely to be difficult or impossible for the public to distinguish between government policy development and the Public Service developing its independent advice on that topic. Briefings are intended to promote public debate and later decision making on future issues not being sufficiently addressed by current policy work programmes. So if the topic is already being focused on by government policy development, it will generally be appropriate to propose other topic for the Briefing.

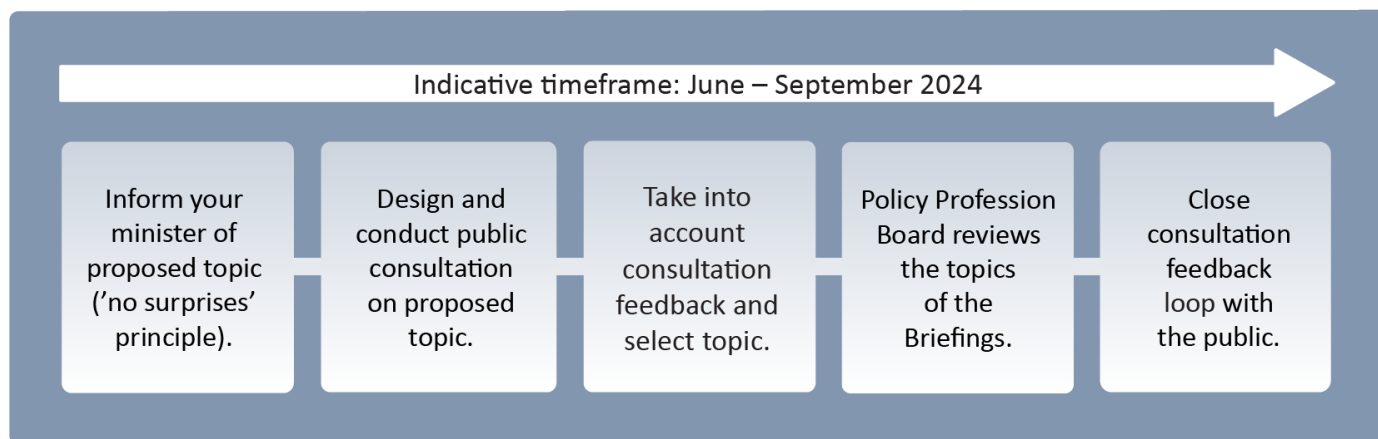
4. The scope of the topic is manageable

The scope of the topic is manageable given existing resourcing, capability and stakeholder relationships to develop the Briefings. Most long-term issues overlap and require clear boundaries to be put in place. Also, check that security classifications don't impose unmanageable restrictions to exploring the topic in public.

5. The topic is particularly relevant to the department's functions

The topic is closely connected to the department's functions and not incidental to them.

Engagement on proposed topic



The Briefings are a mechanism for the public to contribute meaningfully on what matters for the future of Aotearoa New Zealand. Engagement feedback will be considered by your chief executive to make a final decision on the topic of the Briefing. The timing for this step will depend on the extent of the public engagement undertaken.

Additional guidance on consulting on choice of topic

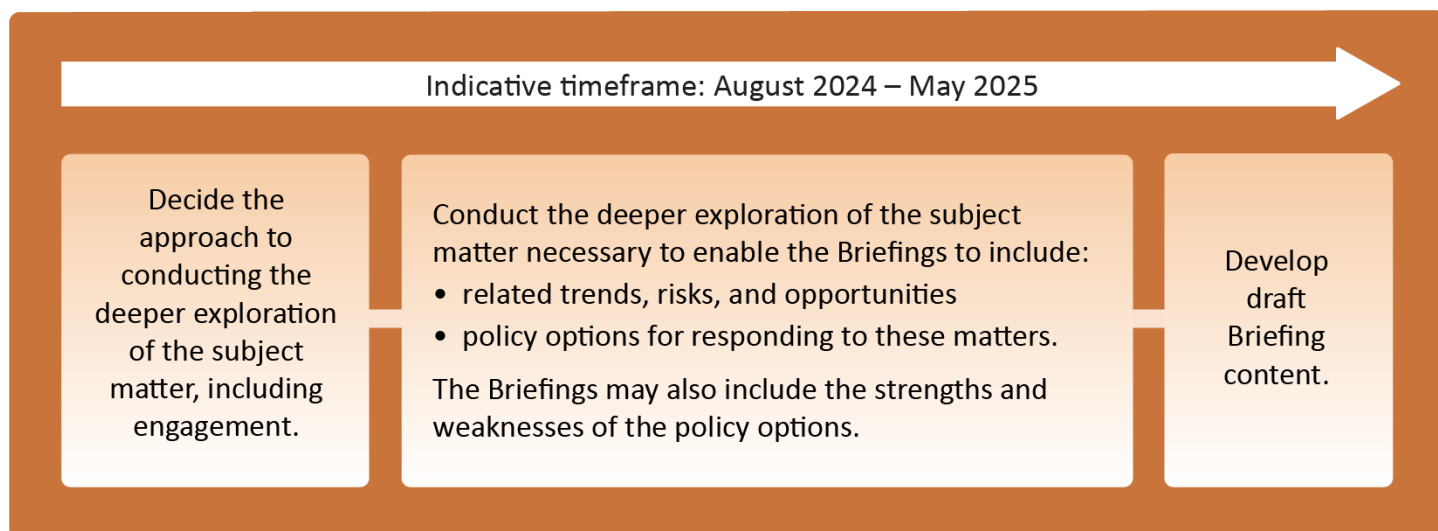
Engagement on the Briefing topic should include clear messaging about the purpose of Long-term Insights Briefings, and how feedback on the possible topic for Briefings will be used. To avoid confusion, any engagement processes on the Briefing topic should be kept separate from engagement processes on related areas of government policy. Annex D of [Long-term Insights Briefings: Process guide](#) provides a series of suggestions for public messaging, intended for departments to adapt for their purposes.

As well as giving the general public an opportunity to provide feedback on proposed Briefing topic, departments may wish to target consultation activities for Māori, and for specific population groups and other stakeholder groups and academics with an interest in the topic. Factors to consider include the range of people likely to have an interest in responding, and whether the interest of some groups creates an expectation of specific consultation or closer engagement. For example:

- Are there Māori interests in the topic?
- Are there specific population groups and other stakeholder groups whose feedback is needed to inform the topic selection?
- Does the department as standard practice consult certain groups when making decisions on that topic?
- Were any groups engaged in Steps 1 and 2 of the Briefing process?

Checklist for Step 3

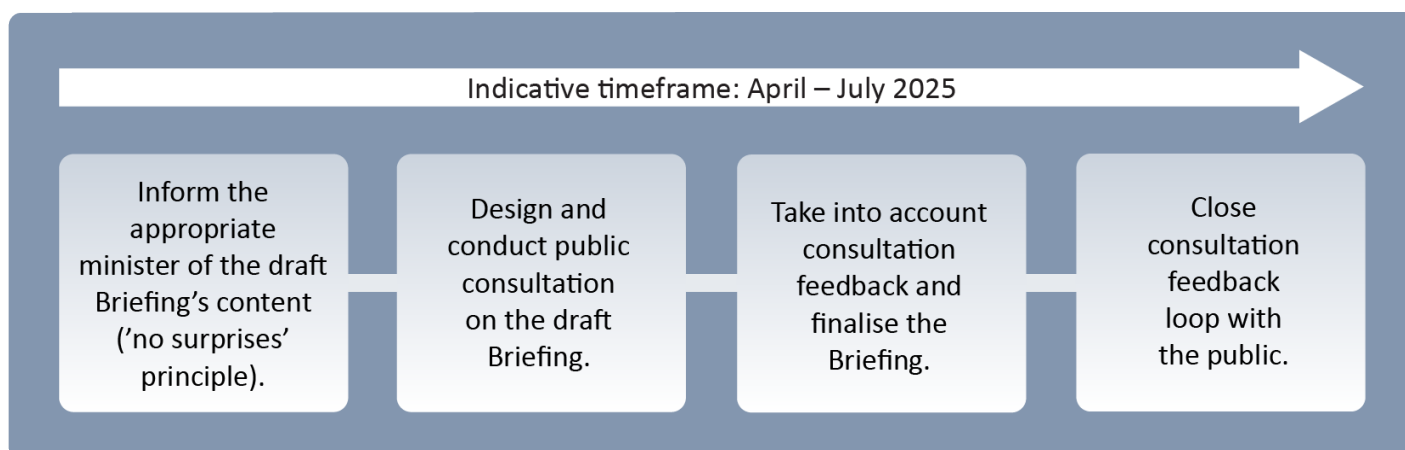
- Have you emailed any links and information on the consultation activities to the [Communications Team](#) at Te Kawa Mataaho Public Service Commission? Its website is the central location for information on the Briefings, and provides links to the Briefings of relevant departments.
- For joint Briefings across departments: Have you 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 departments jointly signing off the Briefing?
- Have you considered the high-level design for your engagement on Briefing topic? See the Policy Project's good practice guides on community engagement, particularly the [Community Engagement Design Tool](#).
- From the high-level design, have you developed the detailed plan for the engagement on Briefing topic? This includes who to engage with, how (using what engagement methods), where, and when.
- Have you 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 you considered the extent to which engagement on topic with iwi, hapū, whānau, Māori organisations, and other Māori interests should occur?
 - 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 you already have that engage iwi and other Māori interests as a start.
- Have you considered how you'll consult the different population groups or other stakeholder groups that are likely to be interested in or affected by the proposed Briefing topic? To help with this:
 - see the Policy Project's [Guide to Inclusive Community Engagement](#) – includes links to agencies with connections to diverse population groups and the tools they've developed for inclusive engagement.
 - 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 you considered drawing out the voices of young people, particularly when discussing issues that have intergenerational implications for wellbeing?
- Have you sought advice or assistance from population agencies to ensure that the groups they focus on are able to participate in your consultation processes? Have you considered the accessibility of the consultation materials for different population groups and other stakeholder groups?
- Have you allocated sufficient resources and time for communication and consulting on the Briefing topic?
- Have you 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 your engagement? There may be opportunities to combine engagement processes on the Briefing with other departments. Have you used the Microsoft Teams group set up by the Policy Project for discussing Long-term Insights Briefings?
- Have you considered the messaging in Annex D of the [Process guide](#) document that departments can use as a starting point to adapt for their communities when communicating on the Briefing?
- Have you briefed the appropriate ministers before consultation on your Briefing topic, in keeping with the 'no surprises' principle – while making it clear this is solely for the minister's information?
- Have you sought advice from the Policy Profession Board on your final Briefing topic?



Checklist for Step 4

- Have you allocated sufficient resources and time for the deeper exploration of the topic? What about for developing and drafting the Briefing?
- Have you considered the role of the various Māori interests in developing the content of the Briefing, and factored in timing considerations as part of your planning? Is there a case for co-drafting a Briefing with iwi Māori? In particular, have you considered:
 - the interests of iwi, hapū, whānau, Māori organisations, and other Māori interests (including as people of Aotearoa New Zealand)?
 - 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 you explicitly considered the implications of the Briefing content for population groups and other stakeholder groups?
- Have you considered good practice for long-term thinking? For example:
 - have you gathered information from a diversity of sources? Do they reveal a diversity of viewpoints and include perspectives from outside the Public Service?
 - have you used several techniques for exploring the future, rather than relying on just one?
 - what are the current assumptions about the topic? Which assumptions are most robust across the range of future conditions?
 - has your exploration sufficiently revealed the key elements in the system we're investigating? How are the elements evolving and interacting?
 - if including the strengths and weaknesses of policy options, have you identified these against the context of future conditions?
 - where there are competing perspectives about issues, opportunities, or options, have you acknowledged the different perspectives and their implications?

- have you considered any limitations of the data, information, and analysis?
- have you 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.
- Have you indicated a preferred policy option? If so, remove it. These Briefings are not advice.
- Have you put in place strategies to address any bias and test your assumptions? Refer to Behavioural Government from the Behavioural Insights Team for some strategies that could be applied.
- Have you considered the Briefing formats that will best suit the target audiences? What about innovative formats? Have you considered accessibility of the Briefing to different population groups and other stakeholder groups?
- Have you kept the Briefing short and accessible? Have you used plain language? See the guidance from digital.govt.nz on how to meet the government's accessibility requirements, particularly:
 - Designing documents for print
 - Accessible language
 - Colour and contrast.

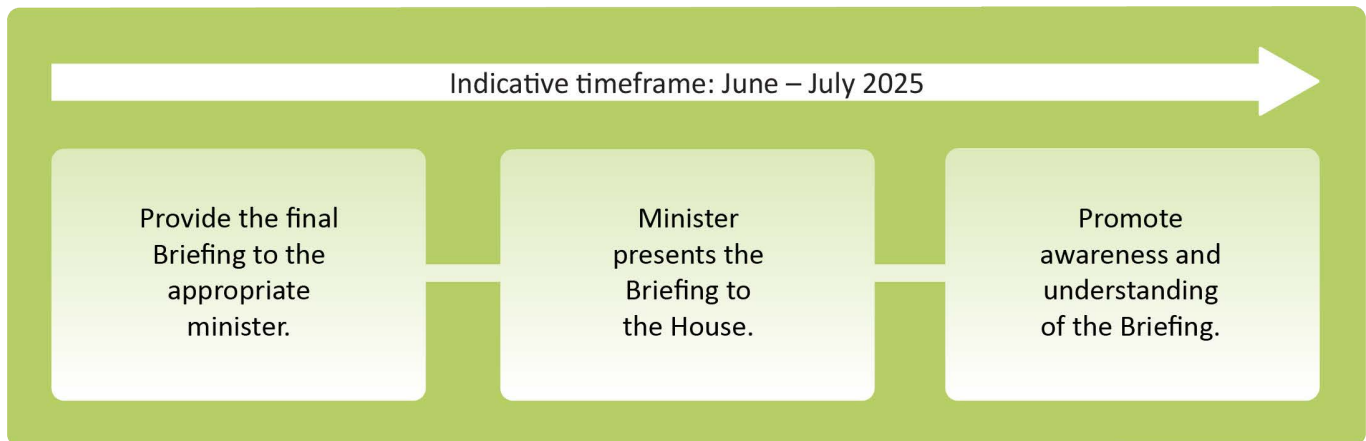


The consultation feedback will be considered by chief executives to make a final decision on the Briefing's content. The timing of this step depends on the extent of public engagement undertaken.

Checklist for Step 5

- Have you emailed any links and information on the consultation activities to the [Communications Team](#) at Te Kawa Mataaho Public Service Commission? Its website is the central location for information on the Briefings, and provides links to the Briefings of relevant departments.
- For joint Briefings across departments, have you 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 departments jointly signing off the Briefing?
- Have you considered the high-level design for the engagement on the draft Briefing? See the Policy Project's good practice guides on community engagement (see the [Open Government Partnership engagement resources](#)), and in particular the [Community Engagement Design Tool](#).
- From the high-level design, have you developed the detailed plan for the engagement? This includes who to engage with, how (using what engagement methods), where, and when?
- Have you considered immersive experiences to 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 you 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 topic:
 - 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 you already have that engage iwi Māori, hapū, whānau, Māori organisations and other Māori interests (including Māori as citizens) as a starting point.
- Have you considered how you'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.
- Have you considered drawing out the voices of young people, particularly when discussing issues that have intergenerational implications on wellbeing?

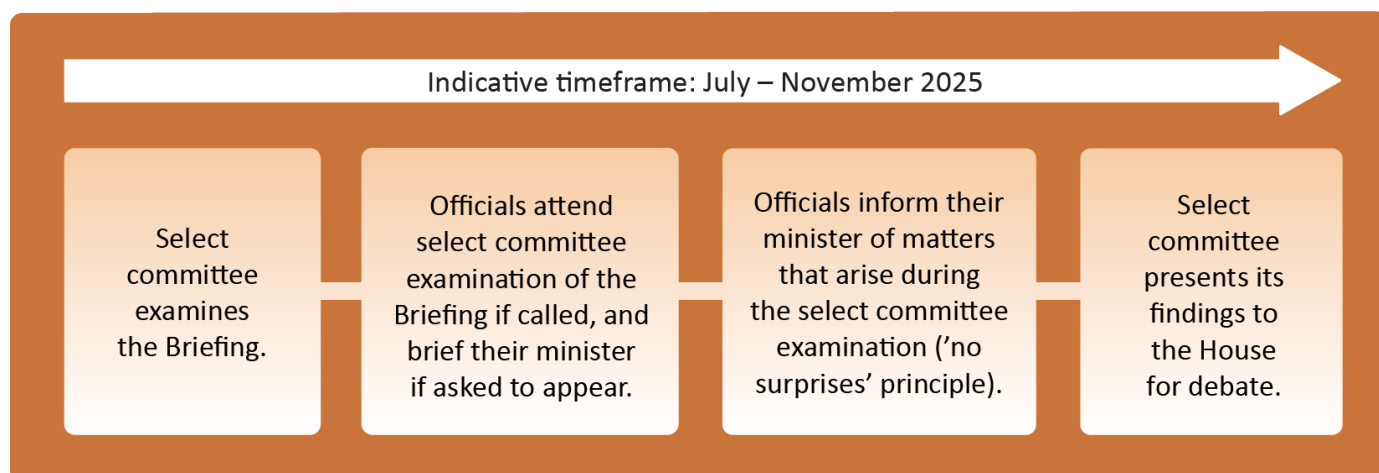
- Have you sought advice or assistance from population agencies to ensure that the groups they focus on are able to participate in your consultation processes? Have you considered the accessibility of the consultation materials to different population groups and other stakeholder groups?
- Have you allocated sufficient resources and time for communication and undertaking consultation regarding the content of the draft Briefing?
- Have you 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 your engagement? There may be opportunities for departments to combine engagement processes on more than one Briefing where it makes sense.
- Have you considered the messaging in Annex D of the Process guide that departments can use as a starting point to adapt for their communities when communicating on the Briefings?
- Have you briefed the appropriate minister or ministers before engagement on the draft Briefing content, in keeping with the 'no surprises' principle – while making it clear this is solely for the minister's information?
- Have you translated the draft Briefing and associated documents to reach the diverse range of people in Aotearoa New Zealand?
- Where possible, have you recognised opportunities to support broader departmental goals through the Briefings by considering the Briefing as part of broader departmental work programmes?



After the chief executive has provided the final Briefing to the appropriate minister, the minister must then present the Briefing to the House of Representatives as soon as practicable.

Checklist for Step 6

- Have you prepared your Briefing in accordance with the usual requirements for parliamentary papers? See [Presenting papers to the House of Representatives](#). This includes making sure the relevant shoulder number G74 is on the Briefing, and there's a downloadable version of the Briefing that's formatted, structured, and tagged to increase accessibility. Consult the [Office of the Clerk](#) for any further guidance.
- If a joint Briefing has been developed, have you been explicit that the Briefing is given jointly and by whom?
- Have you identified the appropriate ministers and provided the Briefing to them?
 - An appropriate minister is the portfolio 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. The [Directory of Ministerial portfolios](#) may be helpful.
 - If a Briefing's scope is wide, there may be more than one appropriate minister. For joint Briefings the relevant functions that appropriate ministers are responsible for may involve multiple departments.
- Have you promoted public awareness and understanding of the Briefing? This should only occur after the appropriate ministers have presented the Briefing to Parliament. For example, have you:
 - allocated sufficient resources and time to communication and engagement activities after the Briefing is delivered to promote the long-term insights?
 - promoted the Briefing in your department? (e.g. sent an all-staff email, put it on the intranet, encouraged managers to run sessions with their staff on what the long-term insights mean for them).
 - promoted the Briefing with Māori, your stakeholders, and broader civil society? For example, have you run a launch event, sent the Briefing to interested people and organisations, and held events to communicate the key insights?
 - emailed the link to the published Briefing and any information on promotional activities to the [Communications Team](#) at Te Kawa Mataaho Public Service Commission? Its website is the central location for information on the Briefings, and provides links to the Briefings of relevant departments.
- Have you translated the final Briefing and associated documents to reach the diverse range of people in Aotearoa New Zealand?
- Have you proactively engaged with media to expand the reach and distribution of the Briefing?

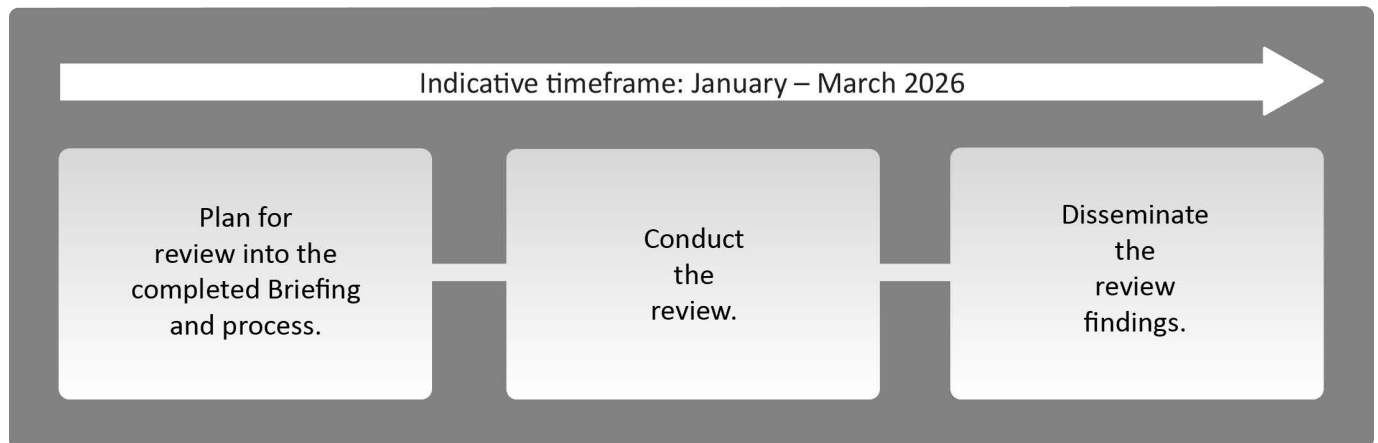


This step enables Parliamentary scrutiny of the Briefings. Select committees may conduct an examination into each Briefing and report their findings to the House of Representatives. Parliament's Standing Orders automatically refer each Briefing to the Governance and Administration Committee – once the minister presents the Briefing to the House. That committee may then refer the Briefing to a select committee relevant to the Briefing's topic.

The select committee may hear evidence from departments, invite ministers to appear, receive their own public input, and seek independent advice. The committee has 90 working days to examine the Briefing. Generally, chief executives will be expected to appear, as the statutory responsibility sits with them. Other officials may attend with the chief executive. There's an expectation that officials will keep ministers informed of matters that arise during the select committee process.

Checklist for Step 7

- Have you 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 you prepared Briefing materials for the 'appropriate minister' if they're invited to appear at the select committee hearings on the Briefing?
- Have you read the Briefing on Long-term insights briefings: Interim report of the Governance and Administration Committee? It sets out helpful tips about what to expect from the select committee examination process.



This step involves conducting some form of review to identify what worked well and what didn't, to identify improvements for the future.

Checklist for Step 8

- Have you decided what type of review to conduct into the Briefing? What mix of internal or external resources will you use?
- Have you decided the scope of the review and the key questions to be answered? 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 topic, including whether to consult on one proposed topic or a number of possible topics
 - 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 third round of Briefings
 - any matters that future guidance should incorporate or provide different advice on.
- Have you identified the key information sources for the review? Have you 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 you shared the review findings with all relevant internal and external stakeholders, including the Policy Project?