

## ***Secretary's Briefing Materials Guidance for Press Events and External Meetings/Calls***

**Overview:** On any given day the Secretary participates in numerous meetings, events, and phone calls with both internal and external participants. Briefing memos are designed to provide the Secretary with the information necessary to successfully complete each engagement. The following is designed to provide uniform guidance for the Operating and Staff Divisions preparing briefing memos for the Secretary for press events and external meetings or calls.

**Process:** Every Friday, Georgette Lewis sends out an email summarizing the upcoming Secretarial events, meetings and phone calls for the coming week. The email assigns a point of contact responsible for submitting each memo. The briefing point of contact is responsible for collecting all information relevant to the Secretary's participation, writing the memo, and submitting it on time.

### **Key Points:**

- **Submit Memos On Time:** It is important that memos are submitted on time. Briefing materials are generally due **at noon the day before** the event/meeting/call. If there are significant updates after the memo has been submitted, contact Georgette Lewis and the person staffing the event/meeting/call to discuss the best way to provide updated information to the Secretary.
- **Define the Secretary's Role:** Above all, the memo should clearly define the Secretary's role in the event/meeting/call. What is expected of her? What does her participation involve? Why is she participating in this event?
- **Be Concise:** The length of the memo should be proportional to the Secretary's involvement. The amount of information included in a memo should match the amount of time she is spending on the event/meeting/call.
  - For example, a memo preparing the Secretary for an hour long, open-press roundtable with Members of Congress and a diverse group of stakeholders should include a greater degree of detail than a memo in which the Secretary is doing opening remarks on a press call and then hanging up without taking questions.
- **Interaction with Exec Sec Clearance Process:** Exec Sec clears policy briefing materials before the Secretary receives them, including decision memos, policy informational memos, and regulation memos. This does not include briefing memos for press events or meetings with members, governors, or other individuals, which are covered by the guidance in this document. By the time each division receives the weekly e-mail from Georgette Lewis, they should already be working with Exec Sec on the memo for the policy briefing. Please see the attached *July 2013 Exec Sec Clearance Processes for Secretarial Meetings, Secretarial Policy Briefing Materials, and Outside Consultation* for further information, including relevant timeframes.

### **Checklist:**

- ✓ Check the Week Ahead: Every Friday, check to see if you have any memos due the following week. If you notice an error in week ahead assignments, please contact Georgette Lewis to seek clarification.
- ✓ Draft the Memo: The person listed on the Week Ahead is responsible for collecting all information relevant to the event/meeting/call and is responsible for drafting the memo.
- ✓ Reach out to other OpDivs/StaffDivs: Most events/meetings/calls aren't limited to one policy area. It's the memo drafter's responsibility to reach out to other OpDiv/StaffDivs to make sure any information pertaining to the event/meeting/call is included in the memo. Make sure that information, numbers, and facts coming from a cross-section of divisions match.
  - When appropriate, include information that is topically related to the events. For example, if the Secretary is doing an event on obesity, please include recently announced or upcoming grants related to obesity.
  - The Office of the Assistant Secretary for Public Affairs (ASPA) and the Office of the Chief of Staff can help provide information for memos or help connect the memo drafter with appropriate OpDiv/StaffDiv staff.
- ✓ Submit the Memo On Time: Submit the memo by noon the day before the meeting/event/call. If you need an extension, please reach out to Georgette Lewis before the deadline.
- ✓ Update the Memo: If there are significant edits to the memo after it's been submitted, contact Georgette Lewis and the person staffing the event/meeting/call to coordinate providing the Secretary with an update. In most cases, an email directly to the Secretary from the staff person will be sufficient.

### **Do's and Don'ts :**

- **Do**
  - Tell the Secretary what is expected of her.
  - Indicate whether information is public, about to become public, or internal only. This is important when the Secretary is going to be speaking to the media, Members of Congress, and other stakeholders.
  - Include local news clips when the Secretary is travelling outside of Washington or speaking with a Member of Congress or Governor. This includes national stories that may have a local impact.
  - Include the name and contact information for a subject matter expert if the issue is highly technical or not something the Secretary has been briefed on previously.
  - Include the ACA state profiles. Legislative actions on ACA and the cover sheet are particularly helpful.
  - Write simply, concisely, and avoid using technical jargon.
- **Don't**

- Submit the materials late in order to make sure every last word of a document has been cleared. It's better to submit the documents on time, let the Secretary know what still needs to be cleared, and then update the Secretary prior to the event/meeting/call.
- Send the Secretary volumes of information via e-mail after the briefing deadline unless it is a crisis or a newly scheduled event.
- Submit a long (10+ pages) memo when the Secretary is only doing opening remarks on a call or delivering short remarks at a closed-press event.
- Submit policy memos – including informational, decision, and regulation memos – through the Scheduling memo process or directly to Georgette. These policy memos should go through the regular Executive Secretariat process.
- Assume that the Secretary has been briefed. Check with the Counselors or Georgette Lewis to find out.

**Questions:**

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