

# Guidelines for writing a policy brief

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## *With a checklist for authors*

This document is intended for authors as an informal guideline for drafting policy briefs. Following a descriptive segment, a Working Paper ([Annex I](#)) is attached which could be useful for drafting a brief, after which a Checklist ([Annex II](#)) is provided, which authors can use to check whether a brief fulfils all the necessary elements. This document provides answers to the following questions:

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## I. What is a policy brief?

A policy brief is a document which is intended to present a certain public policy issue in a concise and effective way, to present the main findings of a conducted research concerning an issue and to recommend measures for their removal. As an **advocacy tool**, a brief is supposed to recommend and highlight the need to adopt a particular public policy alternative, as a credible, relevant, and realistic



option for problem solving. The purpose of a brief is to attract attention and convince an informed, but non-expert public to urgently consider a given issue, to encourage thinking about an issue, but also to undertake concrete, tangible activities.

However, it is important to mention that a policy brief **cannot be a mere summary of a research or analysis** (summary of a study), it needs to be guided by the same basic intention: to provide information in order to engage a wider, non-expert audience and provoke interest for a researched topic. In conclusion, a brief is aimed to present “the tip of the iceberg” which will encourage discussion; it is not an attempt to summarise the entire iceberg from 4 sides. In the process of summarizing, summing up, details are omitted and an overview of the main points which are expanded upon in the wider work is given, but this is not recommended when it comes to a stand-alone document, especially when it is not intended for experts.

## II. Who is the brief intended for and how can its contents be determined?

Most frequently, as mentioned, the audience for which this brief is intended for falls under a group of *informed non-experts* – these are individuals who deal with a discussed area of study, but usually do not conduct deep research and analyses, and do not process professional texts (like decision makers, politicians, activists, the media). Additionally, the majority of the interested public is not able to set aside time and energy to read extensive, demanding and complex texts. In accordance with this, a brief should be made separately considering the audience in each individual case: it is very important to know who we are specifically addressing, in order to align the messages or arguments with the needs and capacities of the stakeholders.

Considering that a policy brief is not supposed to represent a brief of an existing study, we are expected to carefully determine the contents which we wish to convey to the audience in a way which achieves its purpose. The following questions can help us with this:

1. What is the purpose of this brief?
2. What will make the public/readers interested, what would they like to know?
3. Which contextual information should the public know?
4. Which data should be included? Which research findings are the most relevant and the most effective for the audience?
5. How to present the findings in order to best convey a message (for example, textually/graphically)?
6. What are the policy options?
7. What are the recommendations for the option we are advocating for?

These and similar questions can be found in [Annex I](#) – Working Paper which will assist authors in drafting future briefs.



### III. Structural and textual elements

The following are elements of a policy brief – in an ideal sense. This means that they should solely be viewed as recommendations and that not all elements are necessarily represented in the kit. It is understood that research can vary depending on the individual case, and thus there may be differences in the way parts of the brief are conceived. For that reason, it is necessary for the authors to consider how much space they will give to each element and how much attention readers should focus on which part.

In this sense, International Centre for Policy Advocacy iterates that the length of individual parts is determined by the purpose of the brief and the type of discussion we wish to provoke:

- 1) If the goal is to **raise new questions regarding the decisionmakers' agenda**, equal space must be dedicated to explaining issues and recommendations (on a general level);
- 2) If the goal is to **consider options**, the recommendation is that the explanation of an issue should be the shortest, whereas the proposed options/alternatives should take up the longest part of the brief, however enough space must be left for recommendations;
- 3) If we want to **advocate for an introduction of a new solution**, the emphasis is less on explaining the problem, and mostly on giving recommendations at the level of a detailed proposal of activities.

The following are the ideal elements of a policy brief:

#### Heading and subheadings

If we consider a brief as means of advocacy, the heading should be designed so that the reader's first contact with the story sparks curiosity and the need for further information (for example, in the title we can start communicating a message/argument or ask a question we are exploring). The heading should be easy to remember and not necessarily the same as the title of the study: for example, while the heading of the study might be more complex and similar to academic expression ("Implementing environmental impact assessment in the context of European integration: current situation and recommendations"), it is desirable to make the heading of the story simpler, more concise and more effective ("We think in advance for the benefit of the environment"). So, in designing the heading, we should be guided by the intention to communicate the desired message (and not to present the entire research): point out the problem and offer a solution. The heading, for that reason, should have one of the following features: to be clear (meaningful, understandable), concise and succinct, interesting/attractive to the readers, and informative.



Since the brief should contain separate units in order to make it easier for readers to navigate the text, it is recommended to use subheadings. When writing subheadings, in addition to the recommendations that apply to headings, the advice is to use verbs because they make the sentence more dynamic ("Civil society should encourage the authorities to submit data"). The subheading can be asked as a question ("What is the significance of environmental impact assessment?"), but it can also be a statement - an important observation that will make readers think ("Measuring the impact of public policies in Serbia is neglected").

### Abstract (or executive statement)

The authors are encouraged to include an abstract in a policy brief, i.e., a sort of summary for what will follow. This part is not key, but the authors are left to choose whether to prepare this element if the space allows it and the author considers it convenient or important.

A 2-3 sentence abstract should convey the essence of the brief. The abstract serves to inform about the purpose of the brief, it gives an overview of the contents so the readers remain interested, and they get an impression about what they can expect in the text. The brief is usually at the very top of the first page, and it is recommended that it is written as the final step. It usually includes convincing statements about: the specific problem under consideration, the most striking shortcomings of public policy, the main recommendation. This part is specifically intended for readers who have the least time - it may be the only part that some audience members will read and therefore, ideally, it must be concise, effective, direct and memorable.

### Explanation of the topic: Why are changes needed?

This part gives the answer to the question of what the problem is, why is this question important (for the audience we are addressing), what is its purpose, what prompted us to deal with it and what has been done so far. Simply put, this part is intended to describe and contextualise the issue. The purpose of this part is to convince the key audience in the existence of an issue of a specific public policy, which requires urgent action. In accordance with that, the aim of this part is to present the most distinct facts of analysis so that the audience can consider the issue in the right way and understand the need to question existing approaches and come up with different solutions.

This part includes the following:

- A clear statement about an issue or question in the focus of the research
- Short overview of basic causes of the issue, facts which led to the failure of a specific policy
- The effects of this failure, the implications that put this issue on the agenda

### Main research findings - data

In this part we highlight research findings which are relevant to the audience we are addressing. This part:

- Describes the research and analysis
- Gives an overview of concrete facts and data which was gathered (*striking facts*)
- Gives examples which support the claims



- Communicates the implications of the main findings for the policy under consideration

It is desirable that the details be reduced only to what the reader needs to know and that language constructions be carefully chosen: technical expression should not be exaggerated.

### Options for improving/changing public policies

In this part we consider alternatives to existing policies which we have identified as potential solutions in order to strategically correct shortcomings and failures of existing options. This part usually contains:

- Options or considered alternatives
- Principles and criterium which allowed us to evaluate these options
- The option we stand for and arguments in its favour

Those wishing to open a discussion regarding options will put this part as the main element of the brief, whereas the researchers that are advocating for a new solution will merely mention the strategic options and elaborate more on the recommendation part. In any case, it is crucial that this section contains a convincing argument for the option we are advocating for.

### Recommendations for implementing the desired option

The aim of this part is to offer a realistic, achievable, precise, and time-framed solution for current deficiencies and a way in which the current approach can be improved. Recommendations for implementing a desired option include:

- An overview of specific practical steps/measures which must be conducted in a certain time frame;
- A set of activities which different actors can undertake in order to achieve a desired option;

What should be kept in mind is that recommendations are given in accordance with a timeframe and they should therefore outline recommendations for short-term and long-term solutions to the problem. Likewise, it is important to offer realistic, practically achievable recommendations.

This part often includes recommendations classified according to a specific actor (for example, what the government should do; what the local government should do...). This is usually highlighted with bullet points or ordinal numbers.

## IV. Format and design

Policy briefs are usually **four-page to eight-page documents of an A4 format**.

Space should be left on every page of a brief, on the left or right-hand side, for entering key parts which will highlight the main messages and direct the readers' attention. These are square text boxes, which serve as an addition to the main discussion and should be very short, descriptive, and stimulative (for example, asking questions or making important observations). An example of a well-formatted brief can be found [here](#).



In addition, it is desirable that the brief contains a graphical representation of certain data/facts/findings in order to achieve a better effect and so the message is more memorable. In that sense, it is desirable to use pictures, graphs or tables that will present the research findings in an attractive way and provide a better understanding of the topic with a simple presentation. It is obligatory to enter an inscription above or below the chart/picture/table to explain what it is about.

Finally, it is desirable to, in certain parts and in moderation, emphasize the text itself, using **bold letters**, *italics*, **colours**, in order to emphasize some key parts. A combination of all tools should be avoided (*Like this, for an example*).

## V. What are the characteristics of an effective brief?

Attractiveness	The brief should be viewed as an advocacy tool by which we aim to attract and retain an audience’s attention. Therefore, it is recommended that we put “striking” facts we uncovered during our research: for example, certain data which challenges a generally accepted view of an issue. Putting the focus on something surprising and striking can awaken the audience’s interest to seek more information which will serve the brief’s purpose.
Relevance and focus	All parts should be well integrated in an existing discussion about a problem and provide answers to questions which were raised by stakeholders. Moreover, every aspect of a brief should be strategically oriented towards convincing the audience. For example, an argument must build on what they know about an issue and provide insight into what they do not know.
Practicality	The audience is generally not interested in the whole research/analysis process which was used to gather data (except for the conviction that this is reliable), they are, however, interested in concrete new insights into the issue and potential solutions, based on new data.
Conciseness	Readers expect short, direct sentences which explain the essence of the issue. Clear and easy to read. Usually, they do not have time to read long, complex paragraphs. Considering the 4- to 8-page allowance, it is desirable to omit all parts which distract and burden the text, and it is desirable to omit bureaucratic phrases which are often redundant and can be simplified.
Understandability	Simple language, that is easily understandable, avoid filler words and predominantly professional terminology; explain the argument well and adjust it for the wider, but educated audience.
Accessibility, easy navigation	The author of a brief should make it easier for readers who are not able to devote time to detailed reading, by emphasizing the main message wherever possible: by arranging - dividing the text into clear wholes and using appropriate subheadings that will hint at the content of each subsequent paragraph; using tables/charts/figures, bold or using colours that will highlight key messages. If this step is well done, the reader should understand the essence without reading the main text. A good brief should answer the question in 30-40 seconds of reading: What is the purpose, what problem it deals with, what changes it recommends.

Promotion	A brief should be designed appropriately in order to attract potential audience and leave the best and most professional impression. Innovation is desirable. Many authors use the characteristics of promotional material - layout, colours, logos, images, illustrative quotes, etc. Organizations use promotional or marketing tools when presenting a story. According to ICPA, the recommendation is that a brief looks not only professional, but also branded - for example, all summaries of the same organization look the same, which is important if we want to build a reputation and recognition of our products and recommendations.
Factual validity	Since the brief is a product of an analysis, the audience expects rational and reasoned arguments, which are based on facts/evidence that the problem exists, and which are a consequence of the adoption of a certain alternative.
Feasibility and applicability in practice	The brief must provide claims based on what is currently happening in practice in a particular policy, and accordingly propose solutions that will seem realistic to the target group.

## VI. What to avoid?

- Use of technical, legal, economic, or academic jargon
- Overuse of statistics
- Sentences longer than three rows
- Too much information – in a brief we concentrate on those parts of the research that we consider the most relevant, or the most interesting having in mind the audience (keep in mind that a brief is a means of advocacy).
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## Annex I

### Working Paper: Drafting a policy brief

*The working paper serves to compile notes which will assist you during the planning of a brief.*

Key questions
1. Who is the <b>key audience</b> of this brief?
2. How do they talk about this problem? What is the <b>discourse</b> and what are the <b>attitudes</b> ?
3. Which "striking" facts or observations from the research can surprise, interest and attract the target audience the most?
4. What phases in the policymaking cycle does this brief cover?





5. What is the overall message we are trying to convey with this brief? Write a maximum of 2 sentences.

### Planning the contents of a policy brief

**1. Heading** (Think of effective headings which will attract the targeted audience's attention)

**2. Abstract/executive statement** (What should be included in the abstract to persuade the reader to continue reading?)

**3. Rationale** (What elements of the problem/failure of the policy will you focus on to present its importance and urgency?)



Are there any striking facts, charts, photos, or maps that you can include to support your reasoning?

#### 4. Policy options

What arguments and evidence will you provide to demonstrate the advantages/disadvantages of the options? Will they be convincing for your target group?



**5. Recommendations** (What specific steps or measures should be taken to implement the chosen option? Who should take them?)

**7. Recommended sources** (Are there any published documents that can also support the position you are presenting?)

**8. Link to original research/analysis** (Where can the more extensive expert analysis be found? (if any))



9. <b>Contact details</b> (Name, address, telephone number, website, email, etc.)

<b>Presentation and design of a policy brief</b>
1. How will you <b>disseminate</b> the policy brief to your target audience?
2. What <b>impression</b> do you want to leave on readers when they look at your brief?



3. Describe **ideas for scheduling and presenting your policy brief** that you will implement in order to make a desired impression.

## Annex II

Checklist for Authors (can be used to grade one's own brief or a different author's brief)

General		Comments and suggestions:
	The brief's aim is clear	
	The importance of a topic is clear	
	The topic is encompassed into an existing discussion about a problem, it builds on the facts that are known to the audience	
	Expressions used are not overly complex	
	Sentences are not burdened with unnecessary words and expressions	
	The text can be understood without technical knowledge	
	There is no jargon	
	The text is divided into clear wholes with a clear focus in each whole	
	The brief contains graphically displayed information (tables, graphs, figures)	
	The text does not describe the pictures/graphs/tables	
	Above or below each graph there is an inscription - description	
	The visually displayed data is in the most appropriate form	
	The data is easy to understand	
	All data displayed is necessary to support the argument	



	The key observations are easily visible	
	Important parts of the text are highlighted in colour, italics, bold	
	Arguments are based on facts/evidence/examples	
	There is space on each page for square text boxes where the main messages are highlighted	
	The main messages are short and stimulating	
<b>Heading and subheadings</b>		<b>Comments and suggestions:</b>
	Short and easy to remember	
	Interesting/attractive	
	Concise and effective	
	Informative	
	Subheadings highlight the main message which follows in the paragraphs	
<b>Abstract (executive statement)</b>		<b>Comments and suggestions:</b>
	It communicates the significance, importance, and purpose of the brief	
	Gives an overview of the contents of the brief	
	It highlights the issue	
	It emphasizes the main recommendation	
	It is no longer than 3-4 sentences	
<b>Description of the issue</b>		<b>Comments and suggestions:</b>
	The issue is clearly highlighted and its context is described	
	The negative effects of the current situation are highlighted	
	A brief overview of the root causes of the problem is given	
	It is clear why the research was conducted	
	It is clear why this question is important to the audience we are addressing	
<b>Main findings of the research</b>		<b>Comments and suggestions:</b>



	A brief description of the research/analysis is given	
	An overview of the data obtained is given	
	Practical examples which support the data are given	
	The consequences of these findings are clear	
<b>Public policy options</b>		<b>Comments and suggestions:</b>
	Drawbacks of the current approach in order to illustrate the need for change	
	Suggested options or alternatives	
	Principles and criteria used to evaluate options	
	The option we represent is clear and an argument for its choice is given	
<b>Recommendations</b>		<b>Comments and suggestions:</b>
	The recommendations are realistic, practically feasible	
	Recommendations are concrete, precise, clear	
	The recommendations are explained	
	It is clear for whom they are intended for - they are divided according to actors	
	Recommendations are divided according to time-framed- short-term/long-term...	
	Recommendations are appropriate for those to whom they apply	
	The recommendations clearly follow from the presented facts	