Technical Assistance Guide 7

Presenting an Effective Inspection Briefing

Office of Inspector General
Office of Evaluation and Inspections

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Introduction

In the last Guide we saw that a written report is almost always both a required and a valuable product from a Program Inspection. However, a written report is not the only way Inspections staff communicate their findings and recommendations, and it is not even always the most effective way. Personal briefings are at least as effective as written reports, for a variety of reasons.

First, personal briefings are visible, with impact. A written report can sometimes get lost in the shuffle of many important documents, and busy decision-makers might not take the time necessary to read the report in the detail it deserves. A personal briefing, on the other hand, is an obvious event which captures the attention of all who attend, forcing them to focus on the Inspection issues for the duration of the briefing.

Second, personal briefings fit managers' normal operating styles better than do written reports. Management science research indicates that the typical manager spends the day in a series of short, focused meetings dealing with one issue after another. Rarely is there a chance for long, uninterrupted reading. Since it is unrealistic to expect decision-makers to change their normal style of operating to accommodate Inspections staff, we must instead find ways to communicate our information in a style comfortable to decision-makers. A personal briefing often fits this style better than a written report.

Third, personal briefings allow intensive interactions about the Inspection issues, findings, and recommendations. When individual decision-makers read a written report in isolation, each might have questions or comments which would add to the understanding of all readers. But since the readers are all separate, these additional points are not shared. A personal briefing, on the contrary, allows all participants to ask questions, hear answers, provide extra comments, and generally discuss the issue(s).

Fourth, partly because of this intensive discussion, personal briefings encourage action on the issues discussed. Though not impossible, it is not easy to conclude a discussion of important problems without taking some sort of action. There is something about human nature which strives toward closure, even if that closure is simply to commission more study. All Inspections aim to produce positive changes in the Department, and personal briefings encourage such action.

Fifth, personal briefings are typically required at the conclusion of an Inspection. According to the OEI Procedures Manual, May 1990,

- *While briefings may not be appropriate for every Inspection, they are typically held with the Inspector General, top Department officials, and other OIG components. Briefings for outside groups are sometimes held.*

Because personal briefings are an excellent way to communicate the results of an Inspection, Inspections staff must be skilled at presenting two different types: (1) final Inspection briefings for top-level Department officials such as the Inspector General, heads of Operating Divisions, or the Secretary, and (2) "exit conferences" with managers and staff of Operating Divisions and Staff Divisions. This Guide discusses only the first type of briefing, because of its importance. Inspections staff preparing for an exit conference should review this Guide and choose those suggestions relevant for their own situation.

The remainder of this Guide describes 10 steps to planning and conducting an effective Inspections briefing:

1. *Remember the Unique Purposes.*
2. *Determine the Presenter.*
3. *Select the Information to Present.*
4. *Prepare the Appropriate Visual Aids.*
5. *Prepare a Handout for Each Audience Member.*
6. *Understand the Audience's Perspective.*
7. *Establish a Written Agenda.*
8. *Practice the Briefing.*
9. *Finish the Miscellaneous Arrangements.*
10. *Present the Briefing.*

Specific Steps for Presenting an Effective Briefing

Identifying the Purpose and the Presenter

Step #1: Remember the Unique Purposes of a Briefing.

The primary purpose of a briefing is to *create a forum for discussion,* and each of the remaining nine steps in this Guide is directed toward facilitating this discussion. For example, an effective discussion can occur more easily if there is (a) a small, select audience which feels comfortable discussing issues freely with each other and (b) sufficient time for an active discussion.

Just as every fire needs to be primed, though, every discussion must be stimulated, so the second purpose of a briefing is to *convey findings and recommendations and to answer questions.* (While some might suggest that this should be the primary purpose of a briefing, Inspections staff recognize that creating a forum for discussion is a higher priority. After all, decision-makers can read much faster than Inspections staff can speak, so a written report would be much better than a personal briefing for simply conveying information.)

The information to be conveyed generally includes three types of findings: (1) *descriptions* of both the program, policy, or issues being studied and the environments in which they operate; (2) *comparisons* of the observed conditions or activities to certain benchmarks (e.g., the past, what was intended, other settings, ideal circumstances—see Guide #5 for more possible comparisons); and, (3) *interpretations* of these comparisons. These interpretations can and should include, in addition to clearly supportable findings, the personal hunches, speculations, concerns, and impressions of Inspections staff, so long as these non-rigorous interpretations are clearly identified as such.

The third and final purpose of a briefing is to *generate momentum for action.* We noted above that one advantage of a personal briefing over a written report is that briefings tend to encourage action. This is true, but there are at least two ways Inspections staff can encourage this momentum. First, recommendations are critical, and presenting them effectively in the briefing can help to generate action by decision-makers. Second, follow-up actions after the briefing can help to continue the momentum generated. We will discuss specific follow-up techniques in step #10.

Step #2: Determine the Presenter for the Briefing.

More than any other factor, the success of an Inspection briefing depends on the ability of the presenter. Certainly the issues must be relevant, the methods and analyses credible, the findings timely, and the recommendations convincing. But if this information is not presented effectively, the briefing will not capture the attention and interest of the audience.

To date, most Inspection briefings have used only one person to present all the background, findings, and recommendations. While some briefings have experimented with two (or even more) presenters, this is generally not as effective, especially when presenters alternate during the briefing. The audience tends to pay more attention to "Who's up next?" than they do to the information. Even when one presenter goes first and another second, the audience is often diverted from the message of the briefing.

Typically, the presenter is the Regional Inspector General or the project leader. What is important is that the presenter know the information thoroughly enough to be comfortable presenting it and responding to difficult questions (see steps #7 and #10). This requires a presenter who has had some first-hand involvement in all stages of the Inspection, including design, information-gathering, and analysis.

However, it is very important that the presenter have appropriate support during the briefing. A second knowledgeable person can serve effectively as a resource to handle detailed questions or specialized issues. This assistant (often the project leader or lead analyst) sits prominently at the briefing table with the full report, key documents, relevant computer printouts, and other materials which might be needed during the briefing. When the presenter needs help in responding to a detailed question, or even when the presenter draws one of the inevitable "blanks" we have all experienced, this assistant can come to the rescue.

Finally, a third person can perform an important role as a "promoter/ defender" of the presenter during the briefing. For example, perhaps an audience member challenges the presenter in a fairly hostile manner. Or perhaps the presenter has evidence that disputes a claim being made by a much higher-ranked audience member. Because of the status differences between the presenter and the audience, it can be awkward for the presenter to respond to these situations. The Inspector General or his or her surrogate can serve as a buffer in these instances, by intervening either to deflect criticism from the presenter or to convey important information.

Preparing the Briefing Materials

Once the purposes of the briefing are clearly established and the presenter determined, Inspections staff can begin to prepare the necessary briefing materials. This involves three steps: selecting information to present, preparing visual aids, and preparing handouts.

Step #3: Select the Information to Present During the Briefing.

Because briefings last a relatively short time, not all the information from the written report can be presented in the personal briefing. It is inevitable that much of the information from the Inspection simply cannot be presented in the briefing, but choosing which information to omit can be difficult. It is essential to select this information extremely carefully.

In addition to the three types of findings mentioned earlier (descriptions, comparisons, and interpretations) and the all-important recommendations (see Guide #6), a third type of information is also important: the background or context of the issues. Top decision-makers are often surprisingly ill-informed about the purposes of a program or activity, its legislative history, recent changes, and especially its "local-level reality."

This is not because decision-makers are out-of-date or incompetent, it is simply because they are pressed by many competing demands for their attention. They simply do not have the time to be informed about every Department activity, and Inspections staff provide a great service by beginning each briefing with a quick background.

In selecting which information to present during the briefing, it is often helpful for Inspections staff to:

- Begin with the basic "story" contained in the Executive Summary of the Inspection report, adding additional information only when absolutely necessary;
- Consult with senior OEI managers in headquarters, since they have fairly frequent opportunities to observe the audience members in action;
- Consult with the Regional Inspector General who has most recently briefed these particular audience members; and
- Review the audience members' recent speeches, memoranda, or other thoughts on the topic to be discussed.

Step #4: Prepare the Appropriate Visual Aids.

Most briefings should be illustrated using appropriate visual aids, and there are several options from which to choose. Without doubt, the best principle for deciding which visual aids to use is to *learn what the audience prefers.* As we will discuss in step #6, it is vital to understand the audience's point of view, and this includes understanding how the audience typically receives information. After all, it is unrealistic and arrogant to expect audience members to change their preferred style of operating just for an Inspection briefing. Instead, *we* must plan our briefing to mesh with *their* preferred methods.

Overhead transparencies and projected slides are two possibilities, although each requires dimming the lights in the briefing room and each runs the risk of mechanical failure. In one Secretarial briefing, a light bulb in a slide projector suddenly burned out. From then on, Inspections staff were unable to provide all the information they had planned. The lesson is clear: If you use equipment which can break, take extra parts or a complete back-up if possible or bring handouts to duplicate the presentation. (And don't forget extension cords.)

Computer-based briefings are another option. Evaluators at the Food and Drug Administration have developed very effective briefings presented entirely via computer. The background, findings, and recommendations all appear automatically on the screen, and the "pages" can be triggered to "turn" automatically after a certain time period or whenever the audience wishes. Because of sophisticated computer capabilities, these images can be quite elaborate and absorbing. However, until better technology is developed to project computer images to a large audience, this visual aid may be best suited for a very small audience of only a few persons.

For many briefings, one favorite visual aid is a set of briefing charts which both echo and elaborate on the material presented by the presenter. In order for these charts to be most effective, they should be:

- *Limited in number.* The "proper" number of briefing charts will vary with the complexity and content of each briefing, but a good general principle is to limit these charts to as few as possible. Previous OEI experience tells us that 6-10 charts generally make an effective package.
- *Large enough to read.* Different briefing rooms are configured differently, and not all are arranged to have the audience close to the briefing charts. In some rooms, in fact, some of the audience must sit far away. Furthermore, the eyesight of viewers is not always perfect. For both these reasons, briefing charts must be at least 30 x 40 inches in size, with letters and symbols at least one inch high. To ensure readability, Inspections staff should be able to read each chart easily from at least 40 feet.
- *Concise.* A common mistake is to fill a briefing chart with far too much information. The audience then spends all its time trying to decipher and integrate the chart, instead of following the briefing. Each chart should have no more than approximately 7 lines (with 4-5 lines being even better), with plenty of empty space on all sides.
- *Informative by themselves.* Briefing charts should not outline the information to be presented, they should convey the information itself. Each line of each chart should actually communicate important information. For example, rather than reading "Recent trends in reimbursement," a chart should read "Reimbursements have increased dramatically." The audience should be able to learn a great deal simply by reading the charts, without any extra information from the presenter.

- *Easy to handle.* Because the presenter will be moving each chart, and perhaps even returning to certain charts as the audience asks questions, it is important that he be able to manipulate the charts easily and unobtrusively. For this reason, foamboard charts are clearly superior to flip charts or cardboard. Foamboard is a lightweight yet sturdy material which can be purchased easily in art supply stores. Charts can then easily be glued to this foamboard, either by Inspections staff or by art professionals.
- *High-quality.* The audience will judge the quality of the briefing on many factors—the relevance of the issues, the soundness of the findings, and even the appearance of the briefing charts. Whether proper or not, the audience will interpret low-quality briefing charts as representing a low-quality Inspection.

  For that reason, briefing charts should be prepared with great care, perhaps including judicious use of color to enhance their appearance. Certain colors have a greater impact than others, with green, blue, black, and red especially good to use, and in that particular order. Red is also an excellent color to highlight important points.
- *Helpful to the presenter.* Since the presenter will have no script or cards (see step #10), the briefing charts must guide the presenter as much as they guide the audience. If the charts are informative by themselves, as suggested above, the presenter can simply elaborate on the basic material presented on each chart.

  An additional possibility for guiding the presenter is to write at the appropriate point on each chart, in very light pencil, additional information for the presenter. These "crib notes," if written large enough and lightly enough, can be seen by the presenter but not by the audience.

Once regional Inspections staff have drafted these briefing charts, it is often a good practice to send early copies to the headquarters OEI program specialist and senior OEI managers for their review. Often these reviewers can suggest positive changes which might, for a wide variety of reasons, not be obvious at first glance.

Step #5: Prepare a Handout for Each Audience Member

Even when visual aids are used during an Inspection briefing, they are not sufficient by themselves. It is also important to prepare an individual handout for each member of the audience. Often this handout is an exact duplicate, in $8^1/_2$ x 11 format, of the large briefing charts. However, it is sometimes also effective for these handouts to include additional materials not presented on the charts.

These handouts serve several important functions. First, some members of the audience may not see as well as others, and having a set of materials directly in front of them ensures they can follow the briefing. Second, audience members almost invariably make notes or jot down questions as the presenter is speaking, and a handout allows them to tie their thoughts most directly to the relevant point in the briefing.

Third, a handout provides the audience with a tangible product to take away from the briefing. A weakness of some briefings is that they are too transitory, with nothing lasting after the audience leaves the briefing room. A handout which the audience can carry away and discuss with staff helps to create yet another forum for discussion of the issues, especially if the briefing charts (and therefore the handouts) are informative by themselves.

On a practical level, these handouts should already be distributed at each chair before the audience arrives. True, the audience will no doubt leaf through the handout while waiting for the briefing to begin, but this is not a problem. On the contrary, this satisfies their curiosity and allows them to focus more attentively on the presenter once he begins. Distributing handouts at the beginning of the briefing (or, worse yet, during the briefing), both disrupts the flow of the briefing and distracts the audience while each one takes the time to page through the handout.

Setting the Stage for the Briefing

Once the necessary briefing materials are prepared, Inspections staff can turn their attention to "setting the stage" for the actual "event." This involves four steps: understanding the audience, establishing a written agenda, practicing the briefing, and finishing miscellaneous arrangements.

Step #6: Understand the Audience's Perspective.

Every communication involves a message, a source, and a receiver. We have already discussed the message (information to include, briefing charts, handouts) and the source (presenter, assistant, promoter/defender). But what about the audience? What does it bring to the briefing which will determine its success?

First, we must decide who should attend the briefing. We have already seen that, in order to create a forum for frank discussion, we need a small, select audience. There is generally one primary audience member (e.g., the Secretary, head of an Operating Division) and then other secondary members who attend because of that primary audience. As much as possible, these other audience members should be close in rank to the primary audience. However, there are also times when other staff persons should attend because of unique knowledge of the issues (e.g., day care).

Once we determine who will attend, we must learn as much as possible about their predispositions toward the issues. We do this not to skew the briefing information, but to present it in the most favorable context. For example, it is often helpful to know, at least for the primary audience, their:

- *Personal background or interests.* This can be as simple as knowing that former Secretary Bowen was formerly governor of Indiana or that former Secretary Schweiker came from Pennsylvania. After all, if appropriate, examples have to come from one State, and they might as well come from the State most dear to the audience's heart.
- *Likely questions.* Former Secretary Schweiker insisted that every Inspection briefing begin with a chart outlining the HHS expenditures, by Operating Division, for the issues to be discussed. An experienced politician, he knew to "follow the dollars," and he wanted Inspections staff to make those dollars very explicit. Other audiences almost certainly have their own special interests which should be addressed during the briefing.
- *Pet peeves.* Just as decision-makers have their pet interests, they also have their pet peeves. For example, then-Secretary of Commerce Malcolm Baldridge programmed his Department's word processors not to allow the word "impact" to be used as a verb. Or a decision-maker might have a strong bias towards certain types of volunteer activities. In either case, Inspections staff can better present their information if they know to avoid these pet peeves in advance.

- *Range of acceptable actions.* This is the trickiest type of information to incorporate into an Inspection briefing, because it risks self-censorship and subtle distortions of findings and recommendations. But there is almost always more than one way to "package" a recommendation (see Guide #6), and one way is often more palatable than others.

  The crass saying, "There's more than one way to skin a cat," reminds us that more palatable packaging is usually better for generating momentum for action. However, it is also essential to be completely faithful to each recommendation as offered in the written Inspections report.

Inspections staff may learn some of this information from key aides or special assistants to the primary audience. Previous speeches, decisions, memoranda, etc. are also useful, and it is especially helpful to present a practice briefing to these key aides several weeks before the actual briefing. Perhaps the best way to understand the audience, however, is to consult with OEI program specialists and senior managers. These persons frequently attend briefings with the audience members, and they often have valuable insights to share.

Step #7: Establish a Written Agenda for the Briefing.

An Inspections briefing is an ambitious undertaking. It aims to accomplish three impressive tasks—create a forum for discussion, convey findings and recommendations, and generate momentum for action—all in a short amount of time, typically only one hour. To succeed at all three tasks, the briefing needs to be very carefully structured. This requires that Inspections staff develop and distribute a written agenda which includes three major phases as follows:

1. The promoter/defender (almost always the Inspector General) introduces the purposes of the briefing, the importance of the issues to be discussed, and the presenters. This introduction provides the policy framework for the presentation and discussion to follow.
2. Inspections staff present the background, findings, and recommendations of the Inspection, taking no more than one-third of the total time scheduled for the briefing. For example, for a one-hour briefing, the presentation should take 20 minutes or less. Twenty minutes is a very short time, and only by timing each practice briefing can Inspections staff ensure that they will finish in time.
3. The remaining one-half to two-thirds of the briefing involves a general discussion among the audience, the promoter/defender, and the presenter about the issues, findings, recommendations, and possible actions. Since the quality of this discussion is the difference between an effective and an ineffective briefing, Inspections staff must ensure that this discussion is active, frank, and productive.

For an effective briefing, the presenter, even though of lower rank than the primary audience, must be an active participant in this discussion. Toward this end, the presenter should not sit after the presentation but should stand discreetly near the briefing charts. As the discussion progresses, the presenter must not hesitate to interject additional information, reminders about previous statements, suggestions, or even disagreements.

Step #8: Practice the Briefing.

The most important advice for preparing an effective briefing is to practice, practice, practice. Beyond anything else that can be done, practice briefings highlight any weaknesses in time to make the necessary corrections. But the practice briefings should be done under circumstances as close as possible to those to be faced: in the same (or very similar) room, manipulating the actual briefing charts, with an audience arranged as they will be during the briefing, with handouts for each person, at the same time of day if possible, and with a stopwatch to time their duration.

These practice briefings help in several ways. First, they help to fine-tune the presentation. Where should the presenter stand? Where should the charts be placed? What should the presenter do with charts which have been discussed?

Second, practice briefings help the presenter to anticipate questions which might be asked. If the practice audience is composed of knowledgeable policy persons (such as key aides to the primary audience) and if they have been explicitly asked to raise every question they can, this reduces the chance that the presenter will face an unexpected question during the briefing.

Third, practice audiences almost always offer constructive advice on how to improve the briefing materials and delivery. This advice can be as simple as suggesting a new phrase or as involved as suggesting a complete reordering of the briefing. In either case, it is much better to hear these suggestions before the actual briefing than to proceed in ignorance.

The more practice briefings, the better. It is often helpful to begin with a fairly informal briefing to a small, highly supportive audience (the project team? a spouse?). The next practice can be slightly more formal and to a larger, more neutral audience (the Inspections staff in the region?). At least one final session should be completely formal and to an audience prepared to look for any areas needing improvement (central office OEI staff?).

Step #9: Finish the Miscellaneous Arrangements.

As the briefing date approaches, Inspections staff finish three types of miscellaneous arrangements. Ideally, they first distribute advance materials to all participants at least one week before the briefing. This advance material, typically in the form of a memorandum from the Inspector General, includes the topic, date, time, and location of the briefing; names of all participants (presenters and invited audience members); a very brief summary of the Inspection (perhaps no more than one paragraph); and the written agenda discussed above. A full copy of the Inspection report may also be distributed if appropriate. Handouts prepared for the briefing are generally not included with these advance materials.

Second, Inspections staff ideally decide which seating arrangements will maximize both a full understanding of the presentation and an active discussion afterwards. This requires not only ensuring that the presenter is as close as possible to the primary audience and that the entire audience can see the presentation, but also that key audience members will sit close enough to interact freely. In fact, it is often useful to designate certain seats for certain audience members.

Third, Inspections staff also, to the extent possible, arrange the room lighting to highlight the presenter and the briefing charts while still ensuring the audience's ability to read their handouts and make notes. For example, many rooms are equipped with individual spot lighting which can quite easily be directed onto the briefing charts. Doing so allows the general lighting to remain on full brightness at the same time.

Because these miscellaneous arrangements are so important, presenters should arrive at the briefing room early enough to ensure that all arrangements have been made properly. In the last few minutes before a briefing, the last thing a presenter wants to do is hurriedly move heavy tables or chairs or rearrange lighting.

Presenting the Briefing

Interestingly, we have now discussed 9 of the 10 steps to presenting an effective briefing, yet we have barely mentioned the actual presentation itself. This is not an oversight, for the hard work which ensures a successful briefing occurs prior to the actual briefing itself. Once the participants arrive for the briefing, there is very little that Inspections staff can change.

However, the presenter is still critical to an effective briefing, and the presentation must be done correctly. This last step discusses specific techniques for the presentation.

Step #10: Present the Briefing.

To present an effective Inspections briefing, the presenter must do eight things extremely well. He or she must:

1. *Immediately capture the attention of the audience.* As we noted earlier, high-level decision-makers deal with many issues each day. Often they deal with more than one issue at a time, and their attention is naturally split in several different directions. As a result, the presenter must immediately capture their attention, get to the point of the briefing, and let audience members know "what's in this for me."

   One attention-grabbing technique is to display relevant items or pieces of equipment. In a briefing for the Inspector General on Physician Office Laboratories, Inspections staff actually brought in and demonstrated a "glucometer" to show that diagnostic equipment which is otherwise medically useful can give dangerously misleading readings if operators are not properly trained or do not follow proper procedures. The Inspector General himself once demonstrated a seat lift chair during his Congressional testimony on HCFA reimbursement practices.

2. *Provide information which is credible.* Since the second purpose of a briefing is to convey findings and answer questions, the presenter's information must be credible—that is, both accurate and complete. Accuracy is assured by using the appropriate methods to obtain, analyze, and interpret the findings, while completeness is assured by addressing all important issues and by responding as fully as possible to any questions.

3. *Make the presentation understandable.* At the time of the briefing, the presenter probably has a greater in-depth understanding of the issues than do any of the audience members. The presenter's task, though, is not to *display*, but to *convey*, this impressive knowledge.

   This means simplifying the complexity of the issues (often by using graphics), presenting very clear findings for each issue, tying each recommendation to the findings, and, to the extent possible, predicting the implications of possible actions. It also means eliminating all jargon not obviously understood by all audience members.

4. *Interact with the audience as much as possible.* In order to create a forum for discussion and generate momentum for action, the presenter

must interact with the audience as freely and as frankly as he or she wants them to interact with him or her and with each other. This includes being prepared for interruptions at any time and being willing to depart from the "prepared text" whenever necessary.

One way to encourage audience interaction is to announce at the beginning of the briefing that questions are welcome at any time. It is often useful to announce that "I view questions as a compliment. It means I've said something interesting to you, so please ask questions at any time." Under no circumstances should a presenter ask the audience to hold its questions until the end.

Presenting to the entire audience (not just the primary audience) and maintaining effective eye contact also creates a more effective interaction with the audience.

Also, a presenter should not use a microphone, full script, lectern, or pointer. All of these devices simply create an artificial barrier between the presenter and the audience. However, holding small notecards or a copy of the handout (see step #4) is quite acceptable.

5. *Bring the findings to life.* It is very easy for analytical findings to become just that—analytical. As individual responses and incidents are aggregated into the overall findings, the "humanity" of the issues can be lost in the numbers. As a result, the audience may not realize the importance of the findings.

   Quotes from respondents, examples of particular situations, and anecdotes about experiences all help to emphasize the personal impacts and implications of the findings.

6. *Present a totally professional image.* Audience members judge the quality of a briefing by every single one of its many aspects. Whether justified or not, the appearance and demeanor of the presenter is one of the most important of these aspects. A clear speaking voice, appropriate eye contact, pleasant demeanor, and professional clothing all influence the perceived quality of the presenter and, by extension, of the briefing.

7. *Present a balanced picture of the issues.* If the audience suspects that the presenter is offering only part of the findings, either by de-emphasizing or omitting certain information, the presenter's credibility will be lost. The audience will discount both the Inspection findings and its recommendations. This is possibly the worst possible outcome for an Inspections briefing, for it diminishes the credibility of all future briefings.

   Accordingly, the presenter must make every effort to be as balanced as possible. Since being "totally objective" is inherently impossible for subjective human beings, the best way to show fairness is to provide balance. Asking program officials to respond immediately after the presentation is one way to show balance. Other ways are to describe the methods used for the Inspection, to admit any limitations of the findings, and to present evidence which qualify the findings (see Guide #5 "Analyzing the Information Gathered").

8. *Help generate the momentum for action.* The ultimate goal of every Program Inspection is to improve the Department's programs and activities, so the ultimate goal of every inspection briefing is to generate the momentum which can lead to those positive actions. The presenter is partly responsible for generating that momentum, since the presenter is actively involved in the general discussion which follows the presentation.

   One option is continually to steer the discussion back to practical, feasible steps which can be taken to address the issues. Another option is to periodically sum up points agreed to, to seek clarification if it is needed, to ask if agreement has been reached, or to seek agreement on what subject to take up next.

   After the briefing, another very effective option is to prepare unofficial "minutes" of the briefing discussion. These minutes, which can include both the findings and any agreements for future action, can then be sent to all participants as a reminder of exactly what was decided and exactly what should happen next. Follow-up progress reports to each participant can keep the issues visible until all agreed-upon actions have been completed (see the discussion of recommendations in Guide #6).

References for Further Reading

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