<p style="text-align:center">--SAMPLE TEMPLATE FOR STANDARD READ-AHEADS--</p>

READ-AHEAD FOR THE SECRETARY OF DEFENSE
Name of Person/Group he is meeting with (Pronunciation, if needed)
Month xx, 2017, time xxxx-xxxx, Room

From: Under Secretary xxx

Meeting Purpose: A one-to-three sentence executive summary of the topic, the reason that the event is taking place (i.e., was it the SD's request, self-invite by foreign official, follow on to prior meeting, etc), and the SD's role (e.g., receive an update, give guidance, make decision, prep for a future event, etc.)

Objectives: One-to-three bullets that highlight what SD should get from the meeting.

Attendees: List

Background: [No more than 2 pages, and print double-sided]
- In several bullets, provide detail on key issues and additional information <u>relevant to this meeting</u>.
- Explain the choreography of the meeting, including speaking roles/order, timing of expected SD speaking role, whom the SD should turn to for additional information, etc.
- Ensure you describe the bureaucratic state of play, (e.g., AT&L and Joint Staff disagree over proposal x; Cabinet Secretary x will ask you to fund project x).

Attachments: Make Talking Points Tab A (If required)

MINIMIZE supporting attachments. Provide only documents that are essential to the meeting (e.g., an MOU to be signed, a letter or memo that initiated this meeting, etc). Do not include intelligence assessments, or other background materials.

Do include:
1. Biography(s)
2. Coordination: Ensure relevant coordination is completed prior to submission and indicated in attachment.

Meeting Purpose

- State clearly whether this is a decision meeting, an info update, a request for recommendations, and outline expectations for DoD and SD participation (will SD be asked to provide a briefing? Are there particular agenda items where his views will be sought?)

DoD Objectives

Background Organized by Agenda Items

- Be sure to describe the meeting roadmap (i.e., State will brief topic x, DoD will respond).

- Include bureaucratic state of play – where do agency principals stand on the topics being discussed?

Talking Points

- On a separate page (Tab A), organize talking points by agenda item.

Attachments: Include the National Security Strategy paper for the meeting and any DoD papers/charts submitted for the meeting. Do not include intelligence reports or additional background documents. Aim to have no more than 3 tabs.

TALKING/DISCUSSION POINTS

- Should be the second item in the package (limited to one (1) page).

- These points should be short, containing no more than 3-4 bullets that are clear statements of major issues or points to be covered in the meeting. They should:

  - Avoid pleasantries or fillers.

  - Focus on achieving the <u>objectives of the meeting.</u>

- If an **internal meeting**, these **discussion points** should:

  - Serve as guidelines for the discussion.

  - Highlight any decisions the SD may be asked to make.

- If an **external meeting**, these **talking points** should:

  - Provide the SD with crisp language to achieve the <u>objectives/deliverables</u> of the meeting.

  - Be crafted to ensure a <u>logical flow</u> to the conversation.

- **Paginate all documents longer than one page, and print double-sided**.

- 1-inch left/right margins, 1-inch top and bottom margins.

- **Font should be 14 point, Times New Roman**.

- Provide a note card (see template attached) with topline talking points/memory joggers for ALL meetings with non-DoD personnel (foreign counterparts, Cabinet Secretaries, Members of Congress, associations, etc). Notecards with topline talking points/memory joggers for meetings with DoD personnel will be provided when requested based on the specific circumstances of the meeting.

**TALKING POINTS FOR THE SECRETARY OF DEFENSE CALL WITH
TITLE, NAME (Pronunciation, if needed)
Date, time**

Background: [14-point font] *In italics, briefly state who requested call; when the two last spoke; purpose of call; latest state of play on issue to be discussed*

Talking Points: [14-point font]
- Talking points should be bulleted

Read-ahead should not be more than 1 page. If a second page is needed, keep all talking points together on second page. **Insert page numbers on all documents longer than one page and print double-sided**.

Sample Template for Note Card
(XX July 2017)

Discussion Items

- Provide topline talking points/memory joggers for ALL meetings with non-DoD personnel (foreign counterparts, Cabinet Secretaries, associations, etc).
- Include classification at the top and bottom center, the non-DoD personnel name and phonetic pronunciation (specifically foreign counterparts).
- 3-4 main key talking points (full sentences not necessary, just bullets with key phrases).
- Print using 3.88 Envelope Monarch page setup with hard stock cards available from OSD Graphics.
- Microsoft Word settings for the note card:
  - Set font to Calibri (body), 12-point;
  - Adjust size to envelope Monarch (3.88 x 7.5);
  - Margins (top - .22, bottom - .19, left - .31, and right - .3).
  - In addition, use 9-point font spacing between subjects if space needed.