

MASSACHUSETTS INSTITUTE OF TECHNOLOGY
DEPARTMENT OF URBAN STUDIES AND PLANNING

Writing Executive Summaries

What is an Executive Summary?

The Executive Summary is a concise presentation of a report's major findings, conclusions, and recommendations. It is a précis of the more extensively developed substance of the accompanying report. In both content and structure it is tailored to make an impact on the expected readers or readers of the report.

What is its purpose?

The purpose of an executive summary is to provide a brief overview of the content of the report that can be read in a short amount of time to accommodate the schedule of a busy reader. It gets its points across in no more than 1000 words. As a consequence, the Executive Summary cannot include extensive data for support, but it can and should make a concise, coherent, and convincing case for the course of action the report recommends.

Here is what Logistics Management Institute, a Federally Funded Research and Development Center, has to say about Executive Summaries:

The Executive Summary is a succinct presentation of a report's substantive message. We write it for the highest ranking official we seek to inform and, in an objective way, to influence. The idea is to get the message to someone who has authority to act but is so busy that anything time-consuming is likely to be delegated. We deliver a short statement – several pages at the most – for the targeted official to read on the first pass. Through it, we hope to present our recommended course of action and the alternatives to that course.

We come directly to the point, capturing the reader's interest by showing immediately that we offer something useful in our proposed solution, method, or advice. We lay it out in a crisp, appealing style – short sentences; first-person plural; few to no abbreviations, acronyms, titles, technical terms, or jargon; good rhythm; and word combinations that are easy to remember.

We stick to the substance: our findings and the issue, problem, strategy, or process they apply to. And we place our report in its larger context. Most important, we concentrate on what we recommend, who should take the action, what benefit will ensue, and what alternatives are available. We do not recount task activities nor do we refer to the report contents. In fact, we do not even mention the task or the report. *The Executive Summary stands alone* [emphasis in original].

How should the Executive Summary be structured?

Try starting with a statement that puts the problem in a nutshell, that presents in 25 words or less the nature of the task. Follow this with an illustrative statement that supports this assertion. Develop this idea concretely with either quantitative or qualitative findings that show your reader the extent of the problem. If appropriate, you can then indicate the implications of failing to act on the problem. Different subject matters will naturally lend themselves to different treatments, but the most important principle is that your opening paragraph go right to the heart of the matter, rather than recount background information that the reader already knows.

Next, present the three to five major findings resulting from your research. You might have more or fewer, but going far beyond this range may be an indication that your definition of “major” could benefit from rethinking. You may have begun your research with the intention of testing several hypotheses—that is, tentative expectations about what you might find. If so, what did you discover? Keep your focus on actual results, rather than on the process by which you arrived at your findings. Present these findings in either descending or ascending order of importance, or by any other rational scheme that befits the conceptual structure of your analysis.

After this, you can shift your focus to the conclusions you draw from these findings. Here you can put the problem in its broader context. For instance, you can compare your findings with those gained by other studies, if such information is appropriate and available. You might note any trends your findings uncover that constrain your choices for solutions, that preclude or favor particular avenues of approach. At this point your reader should be clear about your criteria for choosing among possible solutions.

Once you have done this you are ready to present your recommendations. If you have followed the procedure suggested above, you will have established firm ground for the recommendations you are about to give. One of the most persuasive means you can use to forge a strong connection between your conclusions and recommendations is to provide clear rationales for having rejected alternative solutions. Such rationales should be logically and conceptually related to the criteria you developed in your conclusions. In making recommendations be as specific as possible concerning actions to be taken. A good test is to apply the journalist’s rule for a good lead: **Who** should do **What**, **Where**, **When**, **Why**, and **How**. Set your recommendations off with bullet points so that they stand out.

At the end, let your client know what benefits will ensue from your recommended course of action, and indicate, if appropriate, what further steps may need to be taken to build upon and refine the research presented now. The following Executive Summary, from a Spring Exercise in the Master’s in Public Policy program at the John F. Kennedy School of Government at Harvard, exemplifies the essential principles discussed above.

Executive Summary

Rhode Island has a growing need for affordable housing for its low- and moderate-income residents. The state is beset by a shrinking supply of affordable housing, increasing numbers of low-income households, and rising prices of available housing stock.

These problems are not unique to Rhode Island. In many parts of the U.S., states and cities are wrestling with ways to provide housing for their lower-income residents. Increasingly, communities are turning to public-private partnerships as a critical element in their response to housing needs.

Partnerships pursue several strategies in their bid to provide affordable housing. A survey of 12 partnerships around the country reveals three basic approaches:

- **Supporting Specific Projects**: Typically the path followed by local and city partnerships, the goal is to fund and develop affordable housing projects. The efforts are almost always project-oriented, with assistance tied to specific plans to develop particular units. This strategy can promise a significant increase in affordable housing stock over a short period of time.
- **Forging Local Partnerships**: A role often adopted by statewide organizations, the goal is to foster the development of local housing partnerships around the state. Partnerships that tend toward this model aim to stimulate awareness among local officials, hoping that increased activity in towns will lead to locally inspired housing efforts.
- **Developing Community-Based Organizations**: This approach aims to develop the long-term capacity of community-based groups. Some partnerships seek to develop small organizations that have little prior experience in housing development or management. The immediate goal is the creation of a broad-based CBO network equipped with solid development, management, and political skills.

Most partnerships mix and match several strategies as they continuously evolve. Though initial strategies and organizational structures vary, the need for action is shared by all. Partnerships must act if they are to hold the interest of investors and meet the needs of their lower-income residents.

The Rhode Island Housing Partnership is now at a point where action is needed. We recommend that in the next six months the Partnership take the following steps:

- **Choose a short-term strategy**: The Board must decide upon a short-term plan of action. Right now, Rhode Island's shortage of affordable housing and the Partnership's need for action suggest focusing on developing projects, much as the Boston Housing Partnership does.
- **Hire an executive director**: Almost all partnerships surveyed looked for a range of skills in their executive director. The Partnership should look for a talented administrator and use later staffing decisions to acquire needed specialties.
- **Aggregate financial resources**: A partnership is only as strong as its ability to finance affordable housing. A partnership cannot hope to lead the campaign for low-cost housing if it offers only what is already available. The Rhode Island Partnership should decide where it will find its funding and how to find new money.
- **Select a project, choose partners, and go**: The critical need is to establish a track record. Potential funders and possible partners will be watching to see whether the partnership is effective. The partnership's initial projects should be selected for both their affordability and ability to be delivered.

There are other issues the Board will have to wrestle with in the future. Will it work only with established non-profit developers? Will non-profits be effective housing managers? These questions are critical. But, for now, the challenge before the Board is to act. The people of Rhode Island cannot afford to wait.

This note was written by James C. Morrison, Lecturer in the Department of Urban Studies and Planning at MIT, for class discussion.