

June 2020

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This policy brief has been funded by the Defence Security Foresight Group (DSFG), a network funded by the Mobilizing Insights in Defence and Security (MINDS) program that is designed to facilitate collaboration and mobilize knowledge between the Department of National Defence, the Canadian Armed Forces, and academia and other experts on defence and security issues.

## Practical Guide To Writing Briefing Notes In The Government Of Canada

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# Overview

The briefing note is an essential tool for conveying information and for contributing to the decision-making process in all government departments and agencies. It is used to explain and express ideas, target sources of concern, analyze issues, provide advice, make recommendations and seek decisions. For accountability reasons all government decisions are based on written documents.

In some cases, those decisions will be within the authority of the Minister (or Deputy Minister), while in others they will require cabinet deliberation and decision. In some cases, where the decision is within the authority of the Minister but is sensitive, there may be informal consultations with other Ministers and departments/central agencies.

In the public service, learning how to write a good briefing note is an excellent way to understand and be involved in an organization's decision-making process.

The purpose of this guide is to help you understand how to think through your approach to a briefing note and to give you the skills to write briefing notes in the federal government. The key elements in, and process for the preparation of, briefing notes are largely applicable across all departments. While each department will have their own specific formats for their notes (which may change over time) the differences are more a matter of form than substance. For a sample format see Annex A.

If following a format and using a template is akin to the 'science' of writing a briefing note, there is also an 'art' to writing briefing notes. Understanding the context for the issue you are writing about is crucial,

> both in narrow terms (e.g. within your depart



# Table of Contents

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Section 1: Planning the Briefing Note



## Importance of the context

The following outline illustrates the importance of context in writing briefing notes:

**Context:** Circumstances leading to the writing of the briefing note.

**Issue statement:** The briefing note's main point or message.

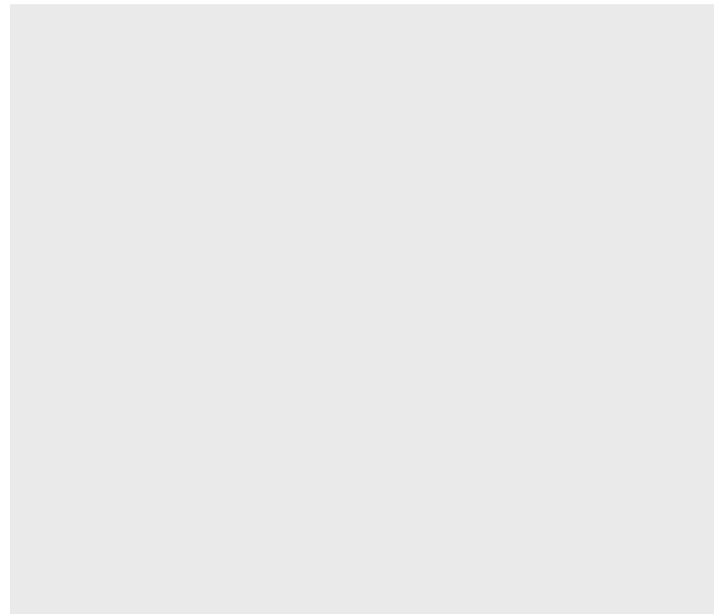
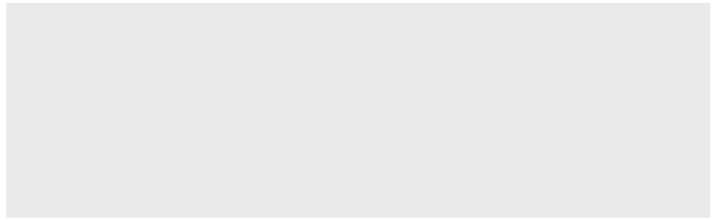
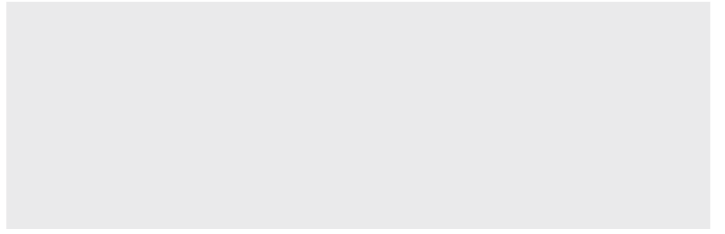
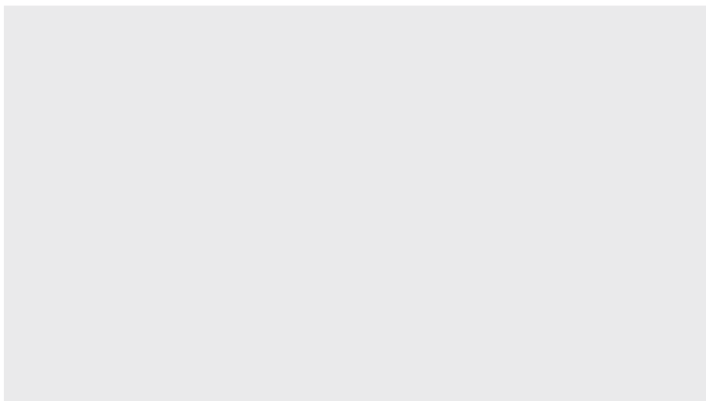
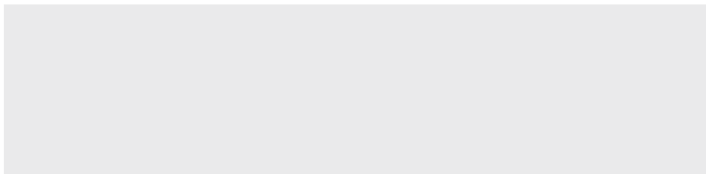
**Content:** Items that will appear in the note to explain or corroborate the issue statement.

## Questions to ask

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not the



- > What advantages and disadvantages should the recipient know about to make a decision?
- > What other evaluation criteria must the recipient use?
- > To answer questions:
- > Introduce the topic in 25 words or less.
- > What aspects of the background information does the recipient need to know?
- > Who is affected by this issue? (Consider the "initiators" and the people affected).
- > Who asked the questions?
- > Why?

	Your Answer
Issue statement	
Introduction of the topic in 25 words	
Aspects of the background that have to be known	
People affected by the issue (consider the "initiators" and the people affected)	

**Table 1: Function of the briefing note: To provide the reader with an understanding of the matter or convey information.**



	Your Answer
Issue statement	
Introduction of the topic in 25 words	
Aspects of the background that have to be known	
People affected by the issue (consider the "initiators" and the people affected)	
Costs or risks associated with this decision	
The advantages and disadvantages to consider when making a decision	
Other evaluation criteria that the recipient needs to use	

**Table 2: Function of the briefing note: To have the reader make a decision or follow a recommendation.**


Once you have finished planning your briefing note, you will be able to go to the research and information production stage, which is covered in Section 2.

# Section 2: Researching and Producing Information

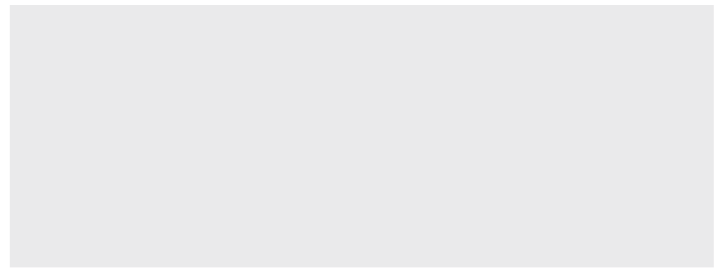
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## OVERVIEW

After planning your note, it is important to identify reliable sources of information and extract the relevant information from them; it can often be useful to consult your colleagues to validate the content you are planning on including.

## 2.1 IMPORTANCE OF CONSULTATION

Consultation is a critical stage in the writing



These documents support the appropriation acts, which specify the amounts that can be spent by the government and for what general purposes. Your department or agency's Departmental Plans will help you ensure that your recommendations reflect your organization's priorities. (You can find Plans for every department on the Canada.ca website).

## The Current Government's Priorities

To maximize your chances of having the reader/decision maker comply with your requests or follow your recommendations, the current government's priorities should be taken into account.

Those priorities can be found in the Speech from the Throne, Ministerial Mandate Letters issued by the Prime Minister and the annual federal budget. All these documents are available online via the Canada.ca website.

## RACI Model (Responsible, Accountable, Consulted and Informed)

The RACI model helps to clearly establish roles and responsibilities. Understanding these is critical to generating a successful and constructive briefing note. By applying this model during the note-writing process, you will be able to determine:

- > Who is **R**esponsible for doing the work (likely you);
- > Who is **A**ccountable for approving the work (your DM although others up the chain of command will be responsible for 'signing off' on the work before it reaches the DM);
- > Who has to be **C**onsulted before the job is carried out or the decision is made; and

- > Who has to be **I**nformed when a decision is made or when the work is finished.

After analyzing the context, consulting the appropriate documents, and meeting with the people likely to add credibility to your briefing note, you will be able to do the outline and write



## The Title

When reading a briefing note, the first thing a reader will ask is: "What is it about?"

By specifying the topic of your note in a title, the recipient will immediately understand what the document is about. Remember, the note is usually written with the aim of achieving one of the following:

- > informing
- > requesting approval
- > asking for a decision to be made
- > recommending
- > providing advice or guidance
- > preparing for a meeting

## The Introduction

The introduction should state the reasons for writing the note. It should also specify the decision requested or the actions to be taken.

Your briefing note should explain to the reader:

- > What it is about;
- > Why it should be read.

You can include a summary in your introduction, but that is optional. If you do include one, it should succinctly present the situation and the content of the note and explain the following:

- > Why you are writing the note (purpose);
- > **What** the situation is and **the** what action is requested or proposed (recommendation/ad-

**situation**

**is**

- > The issues;
- > What the recipient does or doesn't know, and
- > The recipient's position on the matter.

It is important that you provide enough details to:

- > Foster a thorough understanding of the issues and the repercussions on the department, on other organizations and on the Government; and
- > Support the content in the subsection on strategic actions.

You should present all the relevant alternatives that have been dismissed and explain why this is the case.

### The Department's Position

This subsection describes:

- > The decision requested;
- > When and why the action is necessary; and
- > What the impact of not taking action would be.

If no action is required, you would describe the connection between the topic at hand and other issues, concerns or matters.

When other actions are planned, include a detailed schedule of the next steps. For preliminary briefing notes or those requesting a decision, more details can be provided in an attachment or supplement. This part must be balanced and thorough enough that you can defend it under all foreseeable circumstances.

### The Conclusion

The conclusion (comments, projection, next

steps) needs to:

- > Briefly and selectively summarize the main points;
- >

The decision-making recommendation must specifically answer the question “What is the proposed solution?”

### **Additional Information**

This is where you can put additional information and supplements, including general information, a historical overview that seems necessary for understanding the note or deepening the analysis.

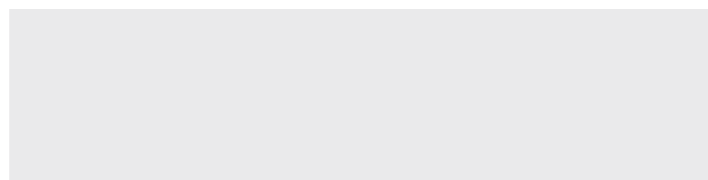
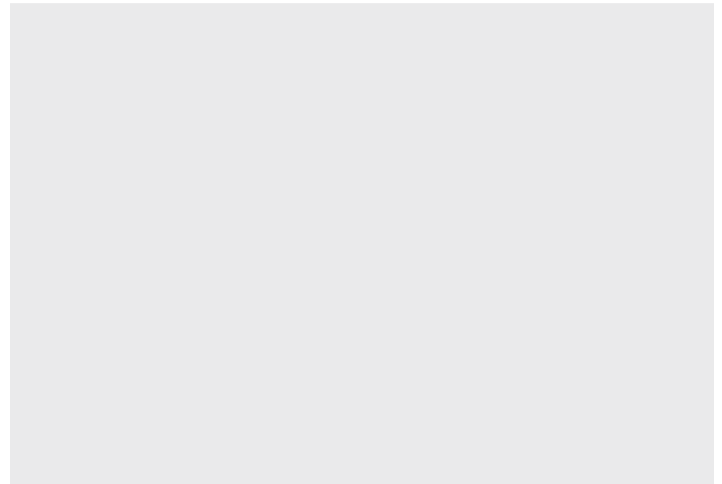
The Annex rounds out the information given in your note. Don't put critical information here because annexes are often skipped by a reader.

## **3.2 STRUCTURING THE NOTE**

### **Organizing the content**

How do you organize the content of your briefing note?

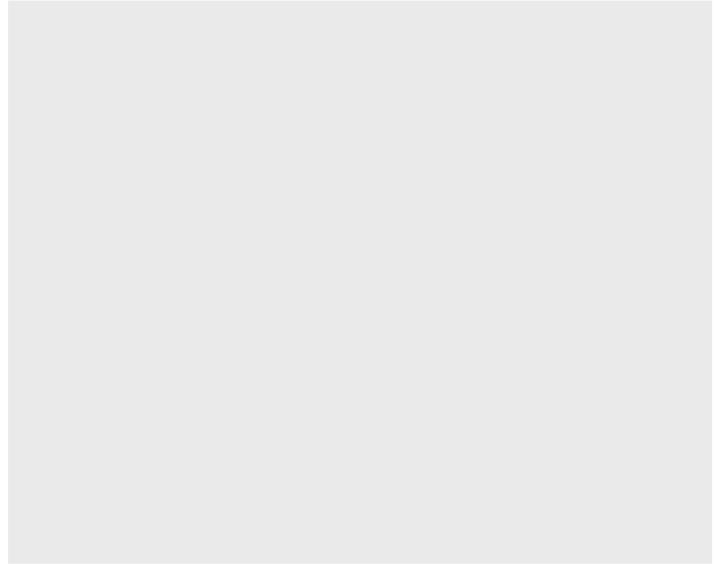
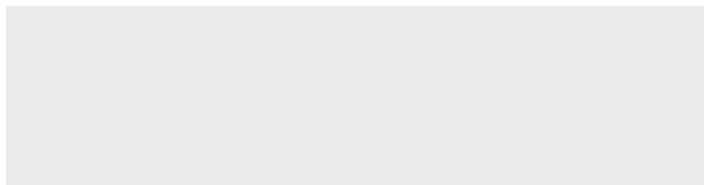
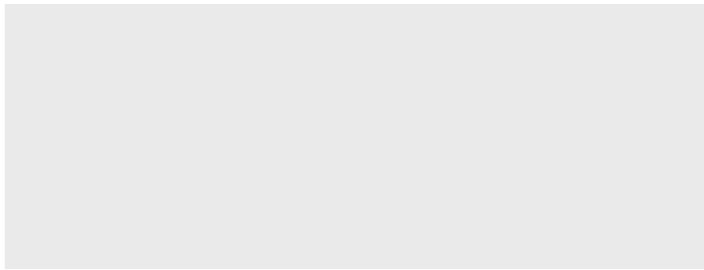
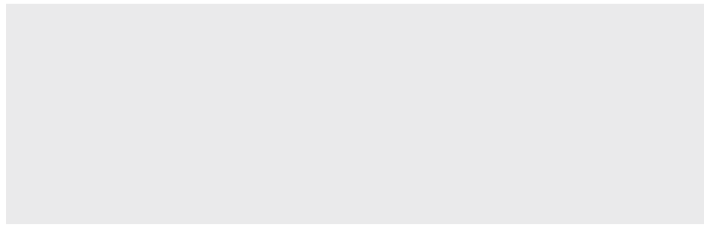
A well-organized note typically follows a top-down approach (e.g. the most important infor-



## Structuring the paragraphs

How do you organize the paragraphs?

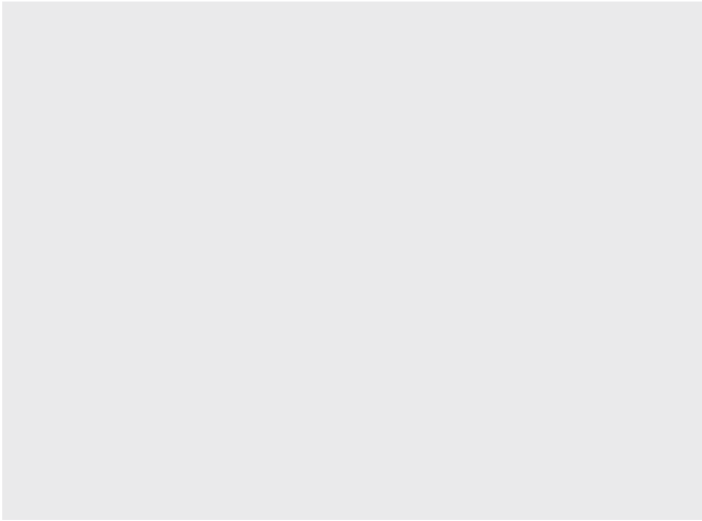
Your paragraphs should present the points in a top-down manner, just like with the briefing note as a whole. Each proposed paragraph should





## OVERVIEW

Once the draft of your note is finished, it is im-



In general,

- > Reduce the length of the sentences
- > Avoid parentheses
- > Bring the subject, verb and object closer together
- > Favour active rather than passive verbs
- > Clarify the actions
- >

## FINAL CHECKLIST

Aspects to review	Characteristics
Communication objectives	The note's intent is clearly indicated.
Purpose	The opening statement is clear and indicates the purpose of the note.
Tone and vocabulary	The tone is appropriate for the briefing note, its recipients and the person signing it.
Variety	Various sentence types and structures are used.
Conciseness	The sentences and paragraphs are short.
Content	The essential information is conveyed neutrally.
Readability	The message conveyed in the note is easy to read, understand and retain.
Brevity	The text's length follows the rules that apply to this type of document; there is no repetition.
Clarity	No misunderstanding is possible; the message conveyed in the note is understandable on the first reading.
Flow	The transition from one section to the next is logical.
Layout	The layout facilitates message comprehension and is attractive to the reader.
Formatting	The note follows the prescribed model and adheres to the conventions that apply to this type of document.
Language	The grammar, punctuation, spelling, typography, and syntax have been checked and carefully reviewed.

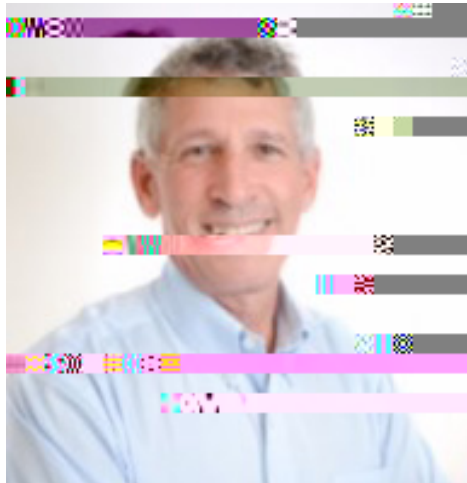
With this checklist complete, you are now ready to sign your briefing note and forward it to the appropriate person (e.g. Director, Director General, ADM). While this should be your best work and your objective is to have written it in a way that it will be approved all the way up to the final recipient, you should also be ready for subsequent readers in the chain of command to come back with questions, clarifications, adjustments, or a request for a meeting to discuss it.

Once the note is signed off to the actioning authority you should expect to hear back in due course about any decision taken and/or any further actions required including next steps.

Every department and agency will have their own memo template. Regardless of the specifics around font, prepared by, sign offs and so on, they all convey similar information. What is purpose of the note,

## About the Author

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Robert Fonberg was a long serving Deputy Minister in the Government of Canada. First appointed Deputy in the Privy Council Office in 2000, he went on to serve as Deputy at International Trade and, from 2007-2013, Deputy at the Department of National Defence. As Deputy Minister of National Defence during the most intense operational period for the Canadian Armed Forces since the Korean War, Rob was involved in all aspects of the Department from deployments of the Canadian Armed Forces, to defence policy renewal to international defence relations. Rob was also integral to stewarding Cabinet-level decision making on all defence matters, was accountable for the entire budget of the DND/CAF, and all aspects of military procurement. Rob partnered closely with three Chiefs of the Defence Staff during this time. As a core and senior member of the Government of Canada's national security team during this period, Rob developed a unique perspective on all domestic, regional and global security domain threat issues, including cyber security. Since 2013 Rob has been active in the private sector as an advisor to start-ups and mid to large scale clients on a range of challenging strategic issues across diverse business verticals. Rob is currently the Chair of the Board of Digital Public Square. Rob has also been active in the academic and think-tank community. Rob is currently Executive Fellow at the University of Calgary's School of Public Policy and Distinguished Fellow at the Munk School of Global Affairs at the University of Toronto. He was formerly a Fellow with the Global Solution Networks, a Mentor with the Trudeau Foundation, Chair of the Government of Canada's Workplace Charitable Campaign and a member of the Board of Export Development Canada. Rob also continues to speak in various fora on issues ranging from public policy development in the 21st century to civ-mil relations, defence and security matters, leadership and governance in a digital world.