

## 2.1 Briefing Notes: Introduction

Structure of the Briefing Note Module of GovTalk

# 2. Briefing Notes

2.1 Introduction and Guide

2.2 Quick Reference: Briefing Note to Obtain a Decision

2.3 Quick Reference: Briefing Note on Event

2.4 Quick Reference: Briefing Note To Propose A Response

2.5 Quick Reference: Briefing Note to Prepare for a Meeting

2.6 Quick Reference: Briefing Note/Policy Brief Writing for Job Applications

## Uses of Briefing Notes

Briefing notes are used extensively within government. They are intended to provide, in summary and easily used format, the recipient with information you and your organization have to:

- Make decisions on specific items for approval, a general direction or strategy for managing an issue. This type of briefing can also include an overview briefing for the user of more detailed policy proposals that are backed up with submissions, policy briefs and detailed analysis, the briefing then serving as the summary of all this other material
- Propose a response to a request from internal or external stakeholders, an incident or media issue.
- To prepare for a meeting of any kind in which the briefer will need to be made aware of the purpose of the meeting and what the expectations of its outcome for them are.
- To provide updates on incidents, issues that are developing or evolving, requiring that the user be briefed and kept up to date.

Each form will be addressed in the subsequent sections of the Briefing Notes module.

## How Brief is Brief?

The length of a briefing note depends on its use, the user and the context. For the most part, being brief means being to the point and getting in front of the user the relevant information, clearly communicated designed to meet the needs of the user at the time. So, in the end, being brief does not necessarily mean being short, but that, for the most part, the shorter the better.

Many users have very clear ideas of how they want to be briefed. The **Style Guide** speaks to that. Many will mandate one-pager briefs for all topics. This will lead, in cases where there are detailed support or decision documents such as Treasury Board submissions to attachments or references to them should the user wish to know more.

The key on length is to know what the rules of the game are. Common sense also enters the picture. For instance, a briefing note of three pages outlining the policy position of an advocacy group – this is also what a Policy Brief will do – that has published a seven-page paper seems like a poor way to lighten the reading load of the user.

Here are some pointers on what the brief in briefing note means:

- **Sharp Language:** Avoid verbiage and edit it down. Keep it unadorned.
- **Avoid Discursive Side Comments:** Seeing something like, “It is interesting in this regard to note the study made on this topic several years ago...” suggest this is not a briefing but a detailed policy brief.
- **Get to the Point:** If you look at the generalized structure of a Briefing Note below, it is designed to get to the point of the user reading it, now and for what reason to what end.
- **Write for Skimming: Avoid Long Paragraphs:** Heavy texts that cover most of one pages will simply not be read. Find ways to summarize. Remember, readers of briefing notes are moving through many documents, trying to capture the essence and prioritize their time.
- **Provide Summarizing Lists or Key Takeouts:** The reader’s eyes move to list quickly. Use them, but well and in context. A briefing of one long bulleted list is not a list. Give each one a heading.
- **Tables and Graphics Can Be Invaluable or Visual Pollution:** Visuals in a Briefing Note should be functional and useful for summary and key illustrative purposes. They should provide the user with key information easily summarized. See **Section 5. Presentation Techniques, Presenting Data and Visualizations** for more information.

### **Structure of Briefing Notes Varies with Use: Here is a Typical Structure**

The structure of notes will vary based on their intended use. The four main uses, as shown above, will be addressed in subsequent sections. Structure will also vary from government to government and even from department to department. In the subsequent sections, recommendations are provided for a format for each of the four main uses, as well as examples. There will be cases when there is more than one use for a briefing note and, in that instance, form should follow function. For example, in anticipation of a meeting with key stakeholders, the department may recommend that the Minister agree with their proposal and deliver a certain message to support his decision. In that instance, there will be a recommendation for decision, but also draft speaking notes for the Minister.

All briefing notes will have elements of the following structure:

- **Briefing Note for:** Who is the intended reader? Example: Minister
- **Subject/Issue:** This is your title only. For example, Flooding Situation in Manitoba

- **Purpose:** Why is this here? For example: For Decision, Update on the Situation. Be time sensitive, e.g., this is for an upcoming meeting today, expect questions on this tomorrow, need a decision by a certain time.
- **Summary:** Think of this as your **B.L.U.F.: Bottom Line Up Front**. As such, this should be a true summary. It is also, if well crafted, a summary that gives the user the key speaking points and way to further explain her position to others. For example, "The policy and grant level adjustments proposed here will give immediate relief that we can deliver quickly to families devastated by the flooding the Saguenay this week. With immediate approval, we can deliver in the coming days." Think of this as what you would say to the reader if that person said: "I don't have time to read this right now. Give me your elevator version." See **Section 5. Presentation Technique for Oral Briefings**.
- **Background:** This sets the context for this note. This is also the swamp in which many briefing notes get lost with too much detailed background that the reader probably already has. The key here is to find how this note links to a probable string of notes and decisions already on the record without too much detail. For example, "Since we last reviewed the issue of the tariff on cranberries, there have been some developments in negotiations that require further direction. This note makes some suggestions for your review."
- **Considerations:** Considerations is an anodyne word for the things that you consider and need to know for this note. This is the second swamp and careful thought must be given to what is absolutely needed. It depends on the use and context. It also depends on how versed the reader is in the issue. Some of the elements that this section may contain are:
  - Key and relevant strategic issues: avoid being grandiose and not every issue relates to the unity of the country., e.g., avoid references to the greater or broader well-known government agenda and be specific, e.g., this matter relates to the plan for a series of announcements on flood victim support that government wishes to make.
  - What options might exist, real options not what has been called the Phony Three, in which there is only one option, and the others are not viable. If no options exist, say so. If you are beyond the options phase, forget any reference. Do not re-open decided policy decisions in a briefing note unless the event, information, or decision does that and that is the purpose of the note, e.g., the decision to limit expenditures and call for a 1% reduction in our budget will affect the decision to expand bus route times in the west end of the city.
  - State what the risks are that are mitigated or might emerge from the issue and why. Risk means anything that can affect the desired outcome and that it likely to happen and have a substantial impact. This is not a

complex risk analysis of the entire situation, but risks that arise from the issue as presented. Further, the risk should be described as such as factually as possible. Further, the actual determination of whether there is a risk is in the hands of the user of the note not the writer as risks have to be accepted. Above all else, avoid the term “this is a risky option” without being very specific about what it means, e.g., the risk posed by the enclosed announcement is that the First Nations engaged may not express support.

- Feasibility of approach. Depending on whether this is a new issue or one in progress, what must be presented here is new information about impediments to implementation and whether the desired outcome is secure. Return to risk here. Also, point out both impediments and mitigating actions.
- Never leave a risk or impediment dangling. The user will inevitably ask, what are you doing about it?
- Relevant costs: if there is a detailed capital proposal, a briefing note can only summarize attached detailed documentation.
- Communications issues: this focuses on the process of communications
- **Recommendation:** The reader should already know this from the Summary.
- **Speaking Notes or Key Response Statements:** This section may contain actual speaking points for the reader or messages that the organization believes are important for the issue in response to an event, initiative, or criticism.