

Policy

# Brief

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

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**Defence & Security Foresight  
Group**

# Overview

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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 department)
  - > Who needs to be aware and consulted and how much understanding do they have?
  - > How is the issue aligned with the government's priorities?
  - > Are stakeholder consultations required?
  - > How does this fit within the other priorities the Minister or Deputy Minister is managing?
  
- > as well as in broad terms (e.g. outside of your department)
  - > What other departments have an interest in the issue?
  - > And, if there is a decision to be taken, whose decision is it and what is the process for making it?
  - > Will it require a Cabinet discussion/decision?

Ensuring you have fully thought through the context, the decision-making environment, the key consultations, and avoiding surprises can often take more time than writing the note itself.

Over time, structuring and writing briefing notes and determining what needs to be in them will become second nature. As briefing notes are critical to accountable decision making, you will get a great return on the up-front investment in understanding the purpose of such notes and how to approach and write them.

# Objective

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To inform participants how to think through and write effective briefing notes in clear, concise language.

To meet this objective, you will undertake an exercise to write a briefing note based on an actual, specific request from a Minister or a Deputy Minister. Your work should be informed by the content and flow of this guide. Your note will be critiqued and graded. You will be given ample time to write your note.

## OUTLINE

There are four sections to this guide:

### Section 1

**Planning the briefing note:** establishing the objective, analyzing the context, defining the issue, determining the recipient's needs, and choosing what information to convey.

### Section 2

**Searching for and producing information:** determining reliable sources and extracting relevant information.

### Section 3

**Writing a draft of the briefing note:** analyzing the main sections, structuring content, and writing the text.

### Section 4

**Reviewing the draft briefing note:** confirming the objective is met, reviewing the text, and ensuring the note is complete.

While this guide sets out the four sections in a sequenced format, it is important to understand that in practice the work and thinking in each of these sections is happening somewhat in parallel, and more often than not, in close collaboration with your colleagues.

## EXERCISE DETAILS

As you prepare to write a briefing note, it is important that you understand the information in this guide.

You should follow the steps set out in this guide closely depending on your experience and skills. If you have little/no experience in writing briefing notes, you should follow all the steps more closely. As you begin writing, you may want to work in groups, challenging one another ('red-teaming') to ensure that you are comfortable with your approach and have covered all angles.

You will need to decide whether this is an information note or an action note (for decision or next steps). You should try to keep the briefing note to two pages; under no circumstances should it exceed three pages.

In this type of exercise, reading other people's notes and listening to the critiques is an important part of learning. Often in these exercises you will be asked to distribute your note to other participants in the course and then take ten minutes each to present the key point of your note to the class, as though you were briefing your Minister or DM. You can make this exercise more realistic by having one student stand in as the Minister to seek clarifications, ask questions and make any required decisions. You should assume that the Minister will have read your briefing note in advance, and that his or her political staff will have provided the Minister with their own comments and questions (which you will not be privy to).

This type of collective review and critique of the notes provides important insights into how senior public servants would exercise a challenge function.

As you work through the sections below, keep in mind how the information and guidance apply to this type of exercise: the actual writing of a briefing note to the Minister or DM.

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# Section 1: Planning the Briefing Note

## OVERVIEW

In this section, we will look at the steps in planning the briefing note:

- > Setting the objective;
- > Analyzing the context;
- > Defining the main issue; and
- > Determining the Minister's 'needs.'

## 1.1 SET THE OBJECTIVE

Regardless of the topic being addressed, briefing notes are intended to achieve one (or more) of the following objectives: to inform, to recommend, to submit for decision or to request approval.

### Informing

- > "Informing" means conveying information on a given subject; e.g. describing a new policy or initiative, following up on a matter, providing a projection, explaining an event.

### Recommending or advising

- > Recommend taking action or advise on a process required to get to a final decision.

### Submitting for decision/requesting approval

- > Presenting information, analysis and options with the aim of getting someone to make a decision; e.g. a number of options are available as part of a new initiative and the Minister has to decide on the preferred option.

In any case, the briefing note often has to argue a point and convince the reader of pursuing a particular course of action.

In all instances, the arguments need to reflect the relevant points of view, be based on evidence, and must not include personal bias.

### General format to be followed for your briefing notes:

You can find a sample template in Annex A. Choose one that you feel is appropriate and modify it if you think there is a need to do so. If you are uncertain about any specific aspects of the template, use your judgement.

## 1.2 ANALYZING THE CONTEXT

### Overview

- > The context dictates the scope of the issue statement.
- > The issue statement determines the note's content.

Briefing notes are not written in a vacuum. A note is always underlain by a context – e.g. a set of circumstances or a triggering event or a government policy or priority.

For briefing notes, that context dictates the scope of the issue statement, which, in turn, determines the note's content.

Without knowing the context, it is hard to define the issue statement. Without the issue statement, it may prove difficult to determine the document's content. If we have no filter for eliminating unnecessary information, we are inclined to include too many details in 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

A well written briefing note highlights the key messages in a way that should capture the reader's attention. Before writing the note, ask yourself the following questions:

1. What is the purpose?
2. Who is the recipient of the note?
3. How can his/her/their needs be determined?

The quality of your briefing note will depend on the clarity of your answers. If you're uncertain about any of the answers, seek clarification from colleagues and collaborators.

## 1.3 SETTING OUT THE NOTE'S MAIN ISSUE

All briefing notes essentially arise from a priority, a position, or an opinion - in other words, an issue. Defining the issue is the stage at which superfluous information is filtered out.

The issue varies based on the purpose of the briefing note:

- > A set of factors, data or issues if the purpose of the briefing note is to inform the reader.

- > A strategy, if the briefing note provides a response, an action plan or a concern about an unresolved matter; and
- > A set of options, if the briefing note deals with a decision or recommendation.

Based on these criteria, an issue statement that simply indicates that a meeting is scheduled on a topic and indicates who might be attending, is not very useful. Rather, the issue statement should provide an overview of the main ideas associated with the objective, with the expected outcomes or with the discussion points that are likely to be addressed during the meeting.

Without a clear statement of the issue, the briefing note might contain too much or not enough information for the reader. The briefing note may also prove ineffective if it provides only the symptoms of a problem without giving the reader a clear explanation of its relevance.

**At this point you should give consideration to the way you will frame the issue for your briefing note to the Minister or DM and get ready to have a discussion on this with your team.**

## 1.4 DETERMINING THE RECIPIENT'S NEEDS

Who is your recipient? Here you need to think about both the 'direct' recipient (who is on the 'To' line of your memo) as well as indirect recipients (who is on the 'CC' line), and who else has to sign off on the memo (virtually all memos to Ministers are signed by the Deputy Minister as the DM is formally accountable for the policy advice of their department; it is also common for memos to indicate who prepared the note and who else signed off in the departmental 'chain of command').

Finally, as noted earlier, you can generally expect that people who are not on any sign off or recipient list may also have questions – e.g. staff in the Minister’s office or in the DM’s office.

Get to know your readers. Your chances of achieving your aim increase with knowledge of your recipients.

After reading your briefing note, the recipient should be able to:

- > Understand the topic in question;
- > Make an informed decision as appropriate; and
- > Answer questions about the topic covered.

### Need for the note

The key aspects to be analyzed regarding the reader include but are not limited to:

- > Does the decision maker need a briefing note now?
- > What must the decision maker have understood after reading the note?

If the answers to these two questions are vague, you will need to ask more questions to guide your analysis before writing a draft of the note.

### The reader’s characteristics

- > What knowledge do they have about the topic?
- > Will they need detailed information? A summary or an overview?
- > What is their connection to the sender?
- > What are their interests? The issues? Their concerns?
- > Do they have any communication preferences (transmission method, length,

format, content, etc.)? Are there any options, instructions?

- > What will the recipient’s reaction be?
- > Do you anticipate any questions? Objections? If so, what are they?

Beyond the reader, you also need to be thinking about whether there is anyone outside your department the reader may have to interact with, including:

- > The Privy Council Office
- > Other departments with responsibilities/interest in the area
- > Cabinet
- > The Prime Minister and the PMO

### Use of the content

The recipient’s needs must align with the content. The use of the content is ultimately more important than who the actual recipient is. The following checklist, while not exhaustive, will help you to analyze the needs of the recipient.

### Recipient requirements

To understand the topic or obtain information:

- > 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).
- > To make a decision or follow a recommendation:
- > 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).
- > What are the costs or risks associated with this decision?

- > 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?
- > What questions are likely to be asked?
- > How can you satisfactorily meet the recipient’s needs (rather than serve the interests of the people who asked the questions)?

**Personalizing the note**

Briefing notes are often guiding exercises and should be personalized (addressed to a single executive officer). You can adapt the template to your needs for analyzing the situation. Regardless of the approach taken, you should have a clear understanding of the note’s objec-

tive and purpose as well as the reader’s needs through a situational analysis before finalizing the outline of your briefing note and writing your first draft.

**Timeliness**

Every manager knows that his/her senior executives need information in a timely manner. A note received too late is useless, and notes thrown together and submitted at the last minute suggest poor management. In some cases, depending on how the senior executives like to work, it may be more effective to seek a meeting to discuss the parameters of an issue before a specific outline or course of action is settled on.

**Analyzing the recipient’s needs**

If you are not familiar with how to begin thinking about your briefing note, the simple structures below can help you with structure. If you want to use them as a guide, from the tables below, select the one that matches the function of the note and fill in the right-hand column using the instructions in the left-hand column.

	<b>Your Answer</b>
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.**



	<b>Your Answer</b>
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.**

	<b>Your Answer</b>
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)	
Who asked the questions?	
Why were those questions asked?	
What questions might be asked?	
How can you satisfactorily meet the recipient’s needs (rather than serve the interest of the people who asked the questions)?	

**Table 3: Function of the briefing note: To answer questions.**

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 process. The decision makers who read the briefing note need to receive advice based on appropriate research and detailed consultations. This will improve the quality of your advice.

### 2.2 INFORMATION ACCURACY

Your readers are often being informed about issues connected with public policy matters which can be further conveyed in the public domain, including through statements in the House of Commons. They need to be able to count on thorough, accurate information. Therefore, it is important to verify the accuracy of your information.

### 2.3 IMPORTANCE OF RESEARCH

Your readers do not have time to do the research themselves. Therefore, they need to be able to count on you to provide them with the relevant perspectives on a given issue. Once you have analyzed all facets of an issue and provided them to your reader, he/she will be able to adopt the best possible approach/solution and make more informed decisions for the benefit of the organization and, ultimately, the

Canadian public.

### Validating the information

It is appropriate to have designated people on your team with whom you can consult to confirm the validity of the information that you will include in the note. These people should:

- > Be well aware of the organization's operations;
- > Have experience in writing briefing notes;
- > Be familiar with your organization's template; and
- > Be familiar with the recipient's concerns.

### 2.4 FRAME OF REFERENCE

Be sure that you know what institutions (universities), specialists and documents constitute credible information sources within your organization. If your writing draws on credible studies, you will increase your chances of having the reader concur with your perspective and make the appropriate decisions.

### 2.5 IMPORTANT CONTEXTUAL READING MATERIAL

As noted earlier, all briefing notes are written in a context. If you want to maximize your chances of including only information that is helpful to the recipient, it is strongly recommended that you become familiar with the high-level context in the three documents outlined below.

#### Your Organization's Departmental Plans

Departmental Plans are part of a set of budget documents.

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 draft version of your note. This is covered in Section 3.

# Section 3: Writing the Draft Version of the Note

## OVERVIEW

By the end of this section you will be able to:

- > Analyze the sections of a briefing note to determine what content to insert in each one;
- > Structure the content to be provided; and
- > Write the draft version of the note.

## 3.1 ESSENTIAL PARTS AND SECTIONS

### Overview

As noted above, every department uses its own template, but every briefing note is generally structured around the sections and subsections outlined in the table below; what follows is a guide only and should be tailored the actual situation at hand.

### Structure of a briefing note:

Subject/Title	
Section	Subsection
Introduction	Purpose
	Summary
Development (generally includes a number of optional headings for stating the facts)	Background
	Current situation
	Issue and considerations
	Consultations
	Department's position/strategic action/compromise
	Repercussions
	Prognosis
	Decision point
People affected by the issue (consider the "initiators" and the people affected)	Conclusion/comments
	Recommendations/advice
	Prognosis
	Next steps
	Others
Conclusion	Conclusion/comments
	Recommendations/advice
	Prognosis
	Next steps
	Others
Additional information (if needed)	

## 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/or what action is requested or proposed (recommendation/advice/decision);
- > What the basis is for that recommendation, advice or conclusion (rationale); and
- > The degree of urgency if any – information notes may have no urgency.

## The Development

This is where you present the situation or the request. The development can contain a number of subsections, as follows:

### Background or Situation

This section refers to the results of your analysis of the context.

- > It explains what the situation, program, project or problem involves.
- > It specifies how the department or organization is concerned.
- > It describes the events that led to the current situation.
- > It indicates the main stakeholders and players as well as their interests.

The key events are given in reverse chronological order. You should present the situation in such a way that the reader is well informed and, therefore, better able to make a sound decision.

The reader should find answers to questions such as the following:

- > Why is this situation (or issue) important?
- > How did we end up in this situation? Where are we now?
- > Are there any precedents for this type of situation? If yes, what decisions were made?

### Analysis and Considerations

This subsection presents an analysis, an argument and the key political priorities, alternatives, options, and compromises, as well as the advantages and disadvantages, taking into account:

- > 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;
- > Present relevant perspectives of other stakeholders; and
- > Provide any feasible counter-arguments and the best ways to address it (unless that has been done in other sections).

The conclusion is where you should explain, if you haven't already, the possible consequences of taking or not taking action.

### Next steps

In the conclusion of an information note, the Next Steps section will answer the question: "Where are we going with this matter?"

You should clearly and concisely state the request for a decision or approval, the recommendations or advice. The decision maker needs to know exactly what you are asking them to do. You should provide a list of actions required to implement the decision or approval, along with a schedule for doing so; or commit to a follow up note doing so.

You should clearly and concisely state the request for a decision or approval, the recommendations or advice. The decision maker needs to know exactly what you are asking them to do. You should provide a list of actions required to implement the decision or approval, along with a schedule for doing so; or commit to a follow up note doing so.

**Recommendations must be feasible, linked to federal priorities, documented, and explained in the background and considerations portions of the Development.**



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 information comes first). This should be done not only for the document as a whole, but for each of its sections/components as well.

How do you structure the points to be covered in your briefing note?

Your note should be structured to cover the points raised in your needs analysis (see Section 1.4). In adopting a top-down approach, you should:

- > First establish the overall plan or main idea; and
- > Research the facts supporting or relating to that main idea.

The main point is presented first (in a summa-

ry box, for example, or in the section on the issue) and will serve as a reference for all the other items or sub items in the other sections.

Then, verify the structure of the information you wish to present using the following checklist. You should be able to answer each question affirmatively to be able to use the structure to write your draft briefing note.

- > Does the structure follow a top-down approach and summarize the main points of the topic covered?
- > Is each set of points in each paragraph of the subsections of the note organized in a top-down structure?
- > Is there enough concrete information to back up the points presented in the note?
- > Does the structure meet the recipient’s needs given the information mentioned in the needs analysis (Section 1.4)?

**If you answered yes to all of these questions, you are ready to write the draft version of your briefing note!**

## 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 present a number of points, with no more than one point per sentence.

As a general guide, it is useful to think about two types of paragraphs in the briefing note:

- > Analytical paragraphs, for setting out an argument or strategy; and
- > Narrative paragraphs, for presenting past, present or future events as well as concrete details to support them.

When do you write an analytical or narrative type of paragraph?

### Analytical

- > For expressing an opinion or deduction, or even for persuading.
- > For presenting a complex idea in a series of secondary points.
- > For setting out an argument backed up by rationales and connections among the ideas.

### Narrative

- > For presenting events in a narrative, chronological, linear style.
- > For presenting details to explain the background or importance of the event.

When writing an **analytical paragraph**, you should present the central point at the beginning and the supporting information next.

Ensure that each analytical paragraph written in

the body of the briefing note, below the statement of the topic in question, follows this structure:

- > **Topic sentence:** presents the content and relevance of the paragraph, in the order of importance of the points raised.
- > **The supporting sentences of the paragraph:** present the technical details that make the topic sentence credible, true, convincing or logically necessary (answer “why?” or “how?”).
- > **Concluding sentence (optional):** presents the consequences or conclusion of the idea expressed in the paragraph or a list of points that will be addressed in the subsections to follow. Added when it seems necessary and when not explicitly or implicitly found in the paragraph.

In an analytical paragraph, the connections between the ideas are presented in cause-and-effect relationships.

**Narrative paragraphs** present a more flexible structure than do analytical paragraphs. You can write narrative paragraphs to relate when an event occurred and to provide secondary details for knowing more about the event in question. In a narrative paragraph, the consequences or relevance of the topics are often part of the background, and the events can be structured in chronological order.

## 3.3 WRITING YOUR DRAFT

Now write your draft!

To write a draft briefing note, consult a generic/prior version of the department’s template at Annex A and adapt as you think necessary.

When you finish writing the draft of your note, you can start a final review as discussed in Section 4.

# Section 4: Reviewing the Briefing Note

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## OVERVIEW

Once the draft of your note is finished, it is important to completely review it. In doing so it is crucial to keep in mind the principles of plain language and language familiar to your audience. First, however, let's ask a simple question: Why are some notes returned by the recipient or someone in the sign off list?

Notes are returned for a variety of reasons, but the following usually apply:

- > The background has not been set properly;
- > The rationale for the note is not clearly spelled out;
- > Crucial information is missing from the summary;
- > Too many details are provided;
- > The analysis and conclusion do not align;
- > The option set is not complete; and/or
- > The formatting, grammar and spelling have errors (this is the worst because you control this).

## 4.1 WRITING THE FINAL VERSION

Once the draft of your note is written, review it using the techniques provided in this section. You will have experience writing essays and other kinds of documents outside the federal government context. Well-crafted Government briefing notes typically have common style elements. Some of these are set out in the following checklist.

## Plain language

Wherever possible, avoid jargon and use plain language (recognizing that the DND/CAF are unique in their use of 'jargon' and you will want to make certain assumptions about what is appropriate; with that said, you should understand that if this issue is to be discussed outside the department – in Cabinet for example – the audience will not likely be familiar with the jargon or acronyms). Here is a checklist to help ensure that the briefing note is written in plain language.

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
- > Use specific verbs

### **Effective paragraphs**

- > Strong main ideas
- > Main idea at the start of the paragraph
- > Body of the paragraph for supporting the main idea
- > Conclusion of the paragraph

### **Appropriate word choices**

- > Avoid repetition
- > Use simple words and expressions
- > Avoid jargon or overly technical terms (DND/CAF are unique)
- > Avoid clichés
- > Lighten the sentences

### **Checking the sentences**

Well-formed sentences are just as important as well-formed paragraphs when it comes to ensuring a note's effectiveness. We will look at **three** techniques for checking that the sentences are suitable:

1. Emphasis;
2. Altering the word order; and
3. Varying sentence length and turns of phrase.

### **Controlling the paragraphs**

Some criteria also apply to the note's paragraphs, which need to be:

- > Targeted
- > Complete
- > Of a suitable quantity
- > Of varying length
- > Coherent

There also needs to be:

- > Repetition of the key word or idea.
- > Effective transitions between paragraphs to give coherence and help the reader follow the flow of ideas while reading the note.
- > Connecting words and linking expressions, which help create transitions, and ensure that the text flows.

### **Concise**

To write a concise note, you should use only the number of words required to make yourself clearly understood. Conciseness is an essential feature of a briefing note, which should be, as a rule, a maximum of two pages long.

The two most common methods for improving conciseness are:

1. eliminating unnecessary words
2. avoiding heavy sentences

### **Clarity**

Using specific, concrete words helps convey a clear message. Verbs should indicate specific actions, and pompous expressions should be avoided.

To improve your note's clarity:

- > Use specific, understandable vocabulary
- > Favour verbs in the active voice
- > Vary the length and type of sentences
- > Bring words with related meanings closer together

## 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.

## Annex A (Sample Template)

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, what is required of the recipient, what is the issue, supporting information, conflicting or different views, recommendations, next steps and so on. Typically, you will see something along the following lines:

Classification: Confidential/Secret/Protected  
Document number: for departmental tracking purposes

Date

MEMO TO: The Minister/the Deputy Minister  
CC:  
MEMO FROM: Whoever is signing the note

TITLE

Decision or signature required as appropriate

Objective: (e.g. To inform you of/obtain your approval for/provide options for...)

SUMMARY

BACKGROUND

ANALYSIS

RECOMMENDATIONS

CONCLUSION/NEXT STEPS

Name/Title of responsible officer

Signature Block for recipient

I approve:  
Signature  
Minister/Deputy Minister  
Attachment(s): **(If applicable)**

Prepared by: Author's name  
Phone number:



## 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.

For more information on our network please visit our website [uwaterloo.ca/dsf-group](http://uwaterloo.ca/dsf-group) or email us at [dsfgroup@uwaterloo.ca](mailto:dsfgroup@uwaterloo.ca)