

GovTalk

1.1 Briefing Notes Style Guide

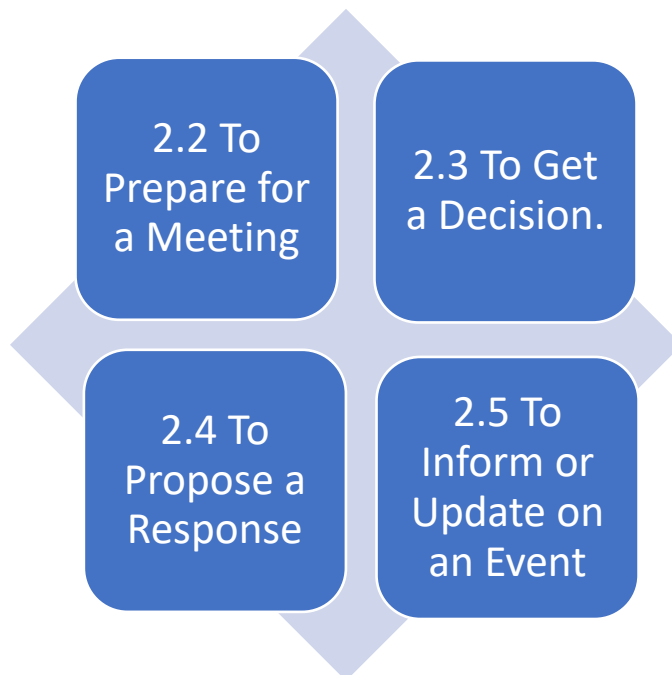
Structure of the Briefing Note Module of GovTalk

1.1 Briefing Notes Style Guide
1.2 To Prepare for a Meeting
1.3 To Recommend or Obtain a Decision
1.4 To Propose a Response
1.5 To Brief or Update on an Event

Part 1. Style and Structure Guide

“It takes a long time to write short.” – based on the quotation from Blaise Pascal, 1665, “I only made this letter longer because I had not the leisure to make it shorter.”

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



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

The User Comes First

In government, briefing notes are used throughout the organization. They are tools to inform political leaders and senior public servants of what they need to know for the four purposes mentioned. The reality is that most leaders in public organizations are very busy and are handling many issues at once. They may not have the in-depth understanding of an issue as the writer of the note – or may well have but benefit from being updated or having the event set in a policy context – but play a vital role in making decisions about the topic, representing the organization to the public or other colleagues or will be asked to comment as the item comes under their purview. The writer supports the user of the note in being successful at this. The key advice is to focus on the user's needs, not the writer's desire to be stylistically or substantively outstanding.

Key considerations to keep in mind when considering the user:

- They are busy, engaged in multiple activities at once, are generally time starved.
- They are intelligent and generally capable of integrated well-presented information.
- They are individuals who absorb information and advice in individual ways. Get to know what that is and adjust accordingly. This can mean the use of point form presentations, one-page summaries, or longer briefs as required.
- They want to know why they have this briefing, why now and why for what purpose.
- They come from a variety of educational, cultural and literacy backgrounds and will approach written material differently. This does not mean they are deficient. It means you will accommodate and support them to get the briefing they need in the way they best benefit from it.

Everything You Write May Become Public

Welcome to the fishbowl of public service. The reality is that much of what you write or is used within government will be accessible. All governments have transparency legislation with access provisions. While there are many exceptions and redactions possible and some governments spend a lot of money inhibiting the release of what is seen as sensitive security information, act as though everything you write, unless you work within clear security guidelines that permit otherwise, will be public. Depending on where you work in government, act as well as if everything you might also be leakable. These two considerations can certainly dampen the writer(s) of briefing material. However, for the most part, it doesn't. Rather it leads to a certain caution in language, some of which can frustrate the using trying to understand

what is exactly being said. They also provide a useful boundary for what to write. Here are some pointers in that regard:

- Avoid commentary on political issues, electoral chances or likely opposition responses, unless this can be documented.
- Do not comment on political matters that might have arisen within the user's party, caucus or Cabinet discussions (versus decisions that re public)
- Be factual and reference government action in decisions that have been made already.
- Use language that is respectful (as noted below), concise and fact-based.
- Meet the user's needs for advice on actions, processes and follow-up in a professional way.

Professional and Organizational Communication Not Personal

In government, briefing notes provide a department or organization's advice and information to the intended reader, be it a Minister, Deputy Minister or other senior official. As such, a briefing note conveys professional advice or information not personal opinion. Considered advice is policy, operational and communication advice based on the collective processes that an organization uses to create it. This sounds bureaucratic and is, in all the best senses. What this means for the writer of a briefing note is:

- This is professional, not personal writing.
- Stay well within the boundaries of official communications, especially if the material is intended to be provided to a political figure. Comments on election outcome, polling data for parties, political issues are no-go areas.
- Briefing notes seldom originate with the writer thinking it would be a good idea to write one. Rather, it is asked for by a superior or central office, such as the office of the Chief Executive Officer, Deputy Minister or Chief Administrative Officer. Alternatively, it can be part of the routine way in which organizations operate when they advance policy matters or identify the need for the intended user to be informed, especially on an urgent basis.
- While the originator of a briefing note may be the best person to initially frame the advice, it will pass through many layers of editing and approval before reaching its reader.
- Notes will follow an established format each organization uses. There is little freelancing on form.

Write and Brief to be Useful and Not Impressive

This theme is core to this Style Book and has many dimensions. Some that are important here, but that will recur, are:

- Simple language, structure and design helps all users.
- Content with too many unfamiliar words slows down the user. Avoid language that begs for a dictionary, long words, acronyms that are not familiar or defined, complex sentence structure.
- Always summarize before providing detail not the other way around. This may be all the user will read.
- Provide headings and titles that let the user decide if they want to read it. Assume skimming.
- Short sentences are easier to read because they limit the scope of an idea. Aim for an average sentence length of 15 words with long sentences no more than 25 words.

Respectful and Culturally and Racially Aware Language

The user of a briefing may come one of the many diverse ethnic and racialized groups that make up this country. They may be from a First Nations or have indigenous heritage. But, regardless of this, all language in briefing material must use respectful and aware language.

While more will follow on this, some basic considerations are:

- Avoid trite generalizations to describe specific groups of people. Use specific terms of identification before applying broader labels, e.g. the Riverdale community group rather than the black community of Riverdale.
- Empowering, strengths-based language, e.g. the leadership of Kahnawake versus representatives of Kahnawake.
- Avoid shorthand terms that carry derogative connotations and are blatantly racist, referring to indigenous people, e.g., referring to “Abo” groups as short form.
- Avoid deficit language: us versus them.
- Avoid colonial possessive terms such our First Nations.

Related Diversity Issues in Writing Briefing Material and Presenting It

Diversity and its recognition in all aspects of government work is a core value of public service. It is imperative that it be practiced inside government as a matter of course. Without becoming too enmeshed in incomprehensible cliché, some sensitivity is required. Here are some pointers on how to avoid unintended missteps that devalues diversity:

- Avoid age characterization that are not strictly relevant. Is the age of the person relevant?
- Avoid broad generalization beginning with phrases like “Old people will generally.....”
- The same applies to younger people.
- Do not use in-house acronyms to describe groups of people, e.g. using CALD instead of culturally and linguistically diverse.

- Limping individuals into an ethnic group is a form of identification that borders on racism unless they occupy an organizational position in an actual organization that represents a specific ethnic group.
- Use gender neutral language when possible and when relevant. The term “they” is gender neutral.

Structure of Briefing Notes Varies with Use

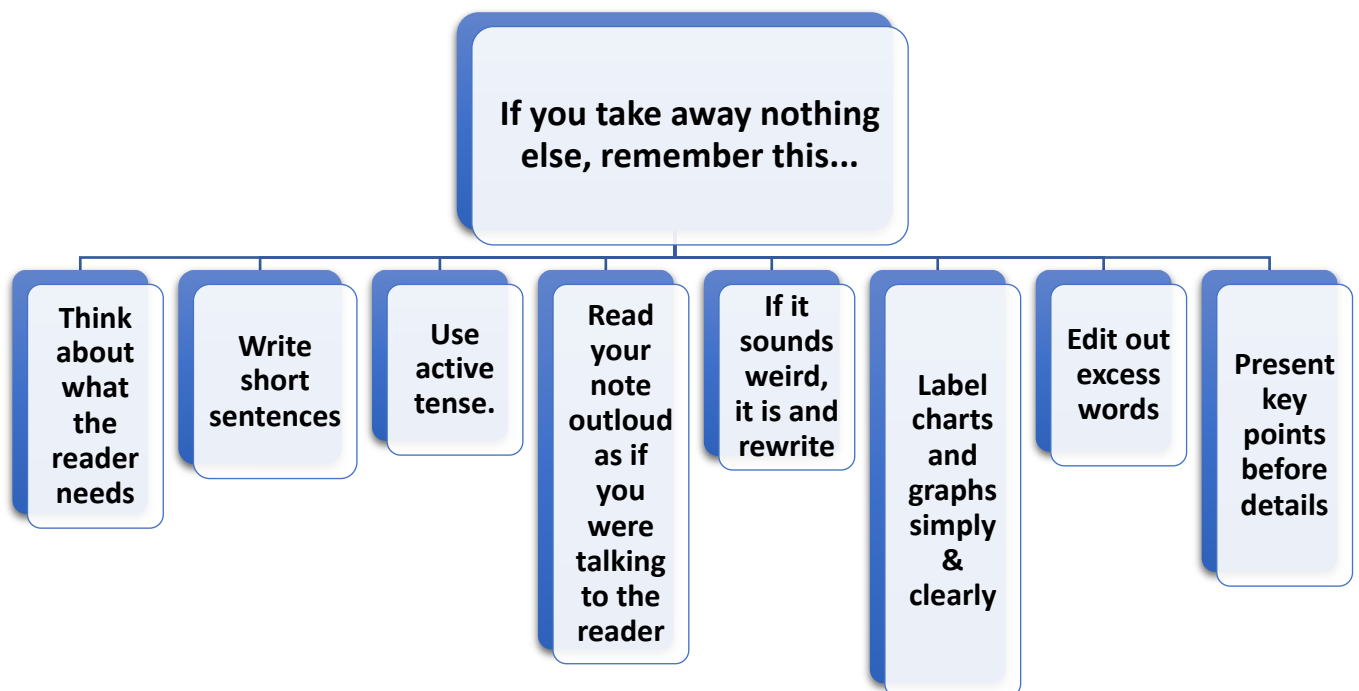
The structure of notes will vary based on their intended use. The four main uses, as shown above, will be addressed in subsequent sections. Structure will also vary from government to government and even from department to department. In the subsequent sections, recommendations are provided for a format 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.
- **Summary:** This should be a true summary. 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.” Alternatively, think of this as your **B.L.U.F.: Bottom Line Up Front.**
- **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 reviews 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:** This is the second swamp and careful thought has to 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.
 - 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.
 - What the risks are that are mitigated or might emerge from the issue and why.
 - Feasibility of approach.

- 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.

Part 2: Keys to Successful Briefing Notes



Here are some of the characteristics of a good governmental briefing note:

- They are **brief enough**. The ideal is 1-3 pages. After that, they are background notes or policy proposals.

- They quickly answer the question: **“Why am I reading this now?”**. Recipients of briefing material are often bombarded with information from many sources and must see the utility of the note to them as well as its timeliness.
- They are **concise**. This is hard to measure but is characterized by being to the point, avoiding side-issues, linking the reader to previous events or decisions and quickly gets to the point. Churchill called this short-winded-ness.
- Avoid, above all **complicated or stuffy language**. This chart is but an example of what this means.

Avoid	Try Instead
A considerable amount/number of.	Much, many, numerous
In addition.	And
Regarding, in regard to, concerning, in reference to...	On, about
In the event that	If
Due to the fact, In light of the fact that	Because, since
Given the information presented here	As noted above/below
To a certain extent, to some extent	XXXX – use nothing
The view has been formed...	I, we, they, the group concluded.
Persons	People
A male/ female person	A man/ woman
A sufficient number of.	Enough
At this point in time	Now
A number of	Some, a few, many
Is able to	Can
On a monthly basis	Monthly
On the grounds that...	Because
In order to	To
Cease and desist	Stop
No fewer than	At least
Not yet attained	Is under
May not...until	May only...when
Is not...unless	Is...only if
The risks/costs/concerns associated with...	The risks/costs/concerns of
On a regular basis	Regularly
Is responsible for the management of...	Manages
In a timely manner	Promptly
For a period of three years	For three years
During the course of	During
Utilize or utilization	Use
At the conclusion of	After
For the purpose	For, to

- They capture the **strategic context** that matters for the reader. This means:
 - As before, they link to other events, decisions or developments in an issue. *“This development will affect the department’s commitment to its employment equity targets.”*
 - They are politically sensitive without being political. *“This issue has been raised in the House by M.P. Plunkett who has expressed her views on this matter at Committee as well.”* Not *“Opposition M.P. Plunkett from the marginal riding of Barrie South continues to press the Minister and staff on this issue and is expected to seek press attention as well.”*
- They are **professional** in that they are impersonal, reader-centered not writer centered, objective, consistent and focused on their intent, not needless asides or arguments. *“The departmental recommendations for your talking points are consistent with the position paper you tabled at committee. It contains a comprehensive defense of your policy position”* Not *“My view as an expert in this field is that you would be wrong to advocate this poorly conceived policy.”*
- They are intelligently **written with an eye to possible release to the public** either through some form of leak or through access to information. The briefer, with experience and advice from accessibility to information advisors, will understand what can and cannot be written down. Further, the briefer will ensure the **appropriate security classification and distribution** of the note. On the other hand, those working in areas of security or where information is classified as it affects individual citizens or employees, will understand that they need to be as **informative** as they can in this written medium.
- They are **useful**. The question to ask is “Does this meet the information needs of the recipient and equip her to make a decision, come to an understanding of the situation, contribute to a meeting or gathering as needed with salient messages to convey?”
- They avoid **jargon**. Jargon is not specialized language relevant to a particular government activity. That is a necessary part of briefing. Rather jargon involves using lofty phraseology, catchphrases and just plain clichés that are not relevant. For instance, *“The introduction of this new pay scheme will improve efficiency and save money, based on our detailed study.”* Is plain language. However, *“The new pay system, an integral part of valuing people, will enhance our corporate capacity to meet the aspirations of our staff, increase the value for money of investments in this area and link to and leverage our strategic vision.”* is blatantly superfluous.
- They **minimize acronyms**. There is nothing wrong with the use of acronyms. They are vital to brevity, as long as:
 - You are certain the reader will understand them,
 - They do not create an **acronym forest**, e.g. *“The DMO approved the BN on the OAG report on the EAA.”*
 - They are acronyms and not short forms, e.g. BN above means briefing note, not an acronym.
- They avoid **insider references**. Everyone in the bureaucratic chain may understand the following, except the reader. *“To bring on an SVS, we will need to complete an SF-40*

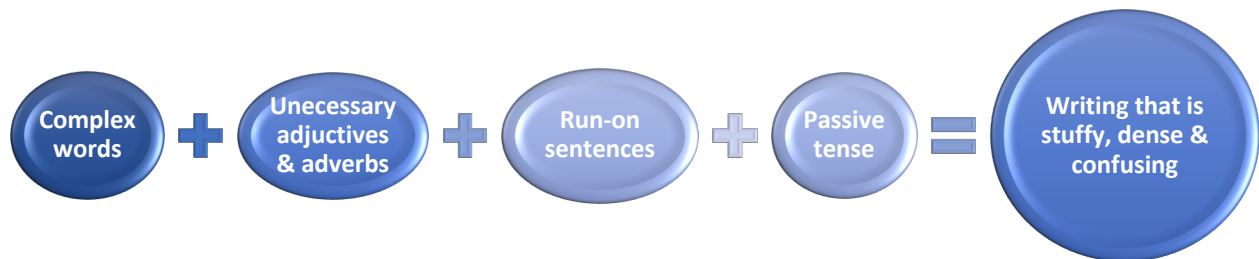
process and then revert to compliance with rules SF-40-337 and, of course, SF-40-337 (a)i.”

The Use of Text Boxes

Use text boxes to draw attention to information. They set information apart, but for a reason. They can provide summaries, checklist, examples, case studies, quotations or definitions, for example. Use sparingly in briefing material. Locate them close to the text they support. Remember, text boxes attract the reader before the main text.

- They present **data graphically** but simply. For more on this, go the GovTalk section, **Using Data**.
- They do not create a **wall of words** filling the page with dense material, not broken into paragraphs, trying to cram as much into a confined space as possible. Instead, break up the material into shorter paragraphs and reduce the length.

How to Not Write a Useful Briefing Note



Edit, Edit, Edit

Briefing Notes are a tool that meet a specific but vital need, as discussed in 1.1 and above. It is important that they are comprehensive but also consistent and tightly organized to meet the users need. Too often, in settings like the School and in the real world, notes do not complete the circle of providing a beginning, “Here is what I am going to tell you.”, a body, “Here is what I am telling you.”, an end, “Here is what I told you.” The story line has to be consistent. One of the great fault lines in poor notes is that the end does not match up with the summary at the start. Therefore, editing is important to get consistency of the story line, achieve economy in terms of length and ensure that the focus is the right one.

Perhaps one of the most difficult challenges is in getting the summary right both in terms of substance, tone and conciseness for the user to act up on it. The simple steps in the edit process are:

- Conduct a plain language review to check for wordiness, long sentences, bloviated language and other malapropisms.
- Proofread for accuracy of references, facts and names.
- Check the design for the best format.
- Do a logic test. Does this make sense. “What would my mother say if she read this?”
- Does the beginning reflect the end? Is the summary what it needs to be. Some people will totally rewrite the summary once the overall note is drafted.