



NOTE ON BRIEFING NOTES

François Brouard, DBA, FCPA, FCA
Sprott School of Business, Carleton University

The purpose of this note is to help the reader understand the purposes, characteristics and content of briefing notes and provide a template.

Purposes of Briefing Notes as a Tool for Meetings

- Convey clear and concise information about an issue that will be discussed during a meeting
- Describe the context, analyze issues, provide options and explain recommendations for informed decision
- Inform or persuade an audience about recommendations, decisions or course of action

Characteristics of a Briefing Note

- Concise (one or two pages) and focused
- Clear (easy to follow)
- Reliable (objective, accurate and complete information)
- Readable (using technical jargon and abbreviation only as needed)
- Professional
- Targeted to participants / audience of the meeting
- Consistency
- Standard format for easy reference
- Be conscious of the public disclosure (Newspaper) test

Content

- Name of governing body and/or committee
- Date of meeting
- Objective of the note (information, discussion, recommendation, approval)
- Subject
- Proponent(s) / Author(s)
- Purpose / Requested action
 - Summarize the purpose and requested action (1-2 lines)
- Context / background
 - Provide contextual factual information and history
 - Set the stage for considerations
 - May include current status
- Key considerations / key points
 - Facts, arguments, opinions, analysis needed
 - Appendices could be use
- Risks (if applicable)
- Resource requirements and communication implications, if any (if applicable)
 - Implications
- Recommendation / Motion
 - Desired outcome
- Conclusion / Next steps
 - Next steps and timeline
- Persons consulted
 - (who (name and position), when)
- Supporting materials / documents

References

- Fonberg, R. (2020). *Practical Guide to Writing Briefing Notes in the Government of Canada*, Defence & Security ForesightGroup, June, 17p.
- Graham, A. (n.d.). *GovTalk - Get to the Point - Briefing Note to Prepare for a Meeting*, Queen's University, 5p.
- Graham, A. (n.d.). *GovTalk - Briefing Notes Style Guide*, Queen's University, 10p.
- McWhinney, H. (2016). *Writing a Briefing Note*, JSGS Professional Workshop Series, Johnson Shoyama Graduate School of Public Policy, 34p.
- Parkinson, R.B. (2017). *Classic Format of a Briefing Note*, October 28, 27p.
- University of Calgary (n.d.). *Action Briefing Note*, 1p.
- University of Calgary (n.d.). *Information Briefing Note*, 1p.
- University of Calgary (n.d.). *Tips for Writing Secretariat Briefing Notes*, 2p.



Template

**SPROTT FACULTY BOARD
BRIEFING NOTE**

(Date of meeting)

for information for discussion for recommendation for approval

Subject

Proponent(s) / Author(s)

Purpose / Requested action

Context / background

Key considerations / key points

Risks (if applicable)

Resource requirements and communication implications, if any (if applicable)

Recommendation / Motion, if applicable

Conclusion / Next steps

Persons / Groups consulted

Name	Position	Date

Supporting materials / documents