



## The Art and Science of Successful Briefing Notes

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### **Annex A.**

## **Headings Used in Briefing Notes for the Minister**

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#### **Classic Format**

You will find a classic format for briefing notes [here](#), along with guidance on how to use it. It covers all the bases but economizes on space, particularly in not using too many headings.

#### **About the Templates Found Here**

The templates you will find here are all dated. They are several years old and should not be considered authoritative for your department or agency. They are provided simply to illustrate the many options available for organizing and formatting briefing notes.

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## **Classic Format**

You will find a classic format for briefing notes [here](#), along with guidance on how to use it. It covers all the bases but economizes on space, particularly in not using too many headings.

## **Summary of Headings Used**

### **Sequence**

Note that the sequence in which the headings appear varies widely from one department to another.

### **Most Commonly Used Headings**

Here are the headings used most commonly in the guidelines from the different departments:

Summary

Issue

Background

Considerations

Conclusion or Recommendation(s) or Advice or Strategic Advice or Recommended Position

### **Other Headings Used by Some Departments**

Here are other headings used by some of the guidelines. These headings can give you ideas for material that you might include in the most commonly used headings above – particularly considerations.

Analysis / Departmental Comment

This is the same as Considerations in the most commonly used headings.

Context

This is the same as Background in the most commonly used headings.

### Communications Implications

This would form part of Considerations in the most commonly used headings.

### Consultations Conducted

This would form part of Considerations in the most commonly used headings.

### Current Status

This material could fall under either Background or Considerations in the most commonly used headings. On its own, it can form a good transition between the two—but the extra heading does take up valuable space.

### Departmental Position

This would form part of Considerations in the most commonly used headings.

### Discussion

This would form part of Considerations in the most commonly used headings.

### Implications

This would form part of Considerations in the most commonly used headings.

### Key Findings

This would form part of Considerations in the most commonly used headings.

### Next Steps

This would form part of the Conclusion in the most commonly used headings.

### Options

This would form part of Considerations in the most commonly used headings.

### Outlook

This would form part of Considerations or the Conclusion in the most commonly used headings.

### Parliamentary Implications

This would form part of Background or Considerations in the most commonly used headings. This would deal with procedural matters, not political matters.

### Purpose

Try to express the purpose in terms that would also serve as an Issue statement.

### Required Action

This would form part of Considerations in the most commonly used headings.

### Resource Implications

This would form part of Considerations in the most commonly used headings.

Timeframe

In most cases, this should be built into the Summary and/or the Recommendation in the most commonly used headings. It could also be part of Considerations.

Transformation Considerations

This would form part of Considerations in the most commonly used headings.

## **Agriculture and Agri-Food Canada**

The headings below are drawn from AAFC's guidelines provided in response to an access to information request submitted in December 2013. However, the guidelines AAFC provided were restricted to notes written as backgrounders and to provide talking points. The guidelines specify that recommendations do not appear in briefing notes. It is likely, then, that recommendations are delivered by another type of document.

Always check to make sure that you are working with the current guidelines. AAFC may also have templates to ease the task of formatting.

### **BACKGROUND BRIEF**

#### **TITLE**

#### **ISSUE**

#### **BACKGROUND**

#### **CURRENT STATUS**

#### **AAFC POSITION**

#### **TALKING POINTS**

## **Canada Border Services Agency**

The CBSA stated only that briefing notes are provided for information, advice, signature or decision. The agency did not provide other headings that are used in a briefing note. It does, however, have templates that likely provide the other headings.



## **Canada Revenue Agency**

The following are headings that the CRA suggests for briefing notes for the Minister, as of September 2009. However, the guidelines appear to permit considerable flexibility in choosing headings.

Always check to make sure that you are working with the current guidelines for the issue at hand. The CRA may have templates to standardize formatting.

### **CLASSIFICATION**

### **MEMORANDUM TO THE HONOURABLE JEAN-PIERRE BLACKBURN**

### **SUBJECT**

### **PURPOSE**

### **SUMMARY**

### **BACKGROUND**

### **CURRENT STATUS**

### **ISSUES**

### **CONSIDERATIONS**

### **OPTIONS**

### **RECOMMENDATIONS**

Etc.

## **Canadian Environmental Assessment Agency**

The following are the headings that the CEAA uses in briefing notes for the Minister, provided in response to an access to information request submitted in December 2013.

Always check to make sure that you are working with the current guidelines for the issue at hand. The CEAA has templates to standardize formatting.

SECURITY CLASSIFICATION  
**FILE NUMBER**

### **MEMORANDUM TO MINISTER**

#### **TITLE**

(For Information) or (For Signature) or (For Decision) or (For Approval)

#### **PURPOSE**

#### **CURRENT STATUS**

#### **ISSUES**

#### **CONSIDERATIONS**

#### **DEPARTMENTAL POSITION**

#### **OPTIONS**

#### **RECOMMENDATION**

#### **NEXT STEPS**

[It appears that Background is provided on a separate sheet.]

## **Canadian Food Inspection Agency**

The CFIA has detailed guidelines on the layout and editing of briefing notes. However, it did not provide the headings that are used. The CFIA may have templates for briefing notes.

## **Canadian International Development Agency**

The headings below are drawn from CIDA's guidelines for general-purpose memoranda to the President or the Minister, provided in response to an access to information request submitted in December 2013. However, CIDA has very detailed guidelines for a wide variety of other briefing notes.

Always check to make sure that you are working with the current guidelines for the issue at hand. CIDA also has Word Pro templates to standardize formatting.

CLASSIFICATION

### **MEMORANDUM FOR THE MINISTER**

#### **TITLE**

**For Decision or For Information**

#### **PURPOSE**

#### **SUMMARY**

#### **CONTEXT**

#### **CONSIDERATIONS**

#### **RECOMMENDATION [or CONCLUSION]**

## **Citizenship and Immigration Canada**

The following are headings that CIC uses for briefing notes for the Minister, as of July 2009. Purpose and Background are required. Other headings are used at your discretion.

Always check to make sure that you are working with the current guidelines for the issue at hand. The CIC has templates to standardize formatting.

### SECURITY CLASSIFICATION

File Number

### MEMORANDUM TO THE MINISTER

#### SUBJECT

(For Information) or (For Signature) or (For Approval) or (For Decision)

#### **PURPOSE**

#### **SUMMARY**

#### **BACKGROUND**

#### **CURRENT STATUS**

#### **ISSUES**

#### **CONSIDERATIONS**

#### **IMPLICATIONS**

#### **OPTIONS**

#### **NEXT STEPS**

## **RECOMMENDATION**

## **Correctional Service Canada**

The following are headings that CSC uses for briefing notes for the Minister, provided in response to an access to information request submitted in December 2013. Issue is a required heading. The others are provided only as examples. You may use other headings.

Always check to make sure that you are working with the current guidelines for the issue at hand. CSC may have templates to standardize formatting.

### **TITLE**

#### **Issue:**

#### **Background:**

#### **Summary:**

#### **Current Status:**

#### **Discussion:**

#### **Analysis:**

#### **Implications:**

#### **Key Findings:**

#### **Options:**

#### **Recommendation:**

#### **Next Steps:**

#### **Required Action:**

#### **Transformation Considerations:**

#### **Conclusion:**

## **Department of National Defence**

The following are headings that DND uses for briefing notes for the Minister from the Deputy Minister, provided in response to an access to information request submitted in December 2013.

Always check to make sure that you are working with the current guidelines for the issue at hand. DND may have templates to standardize formatting.

### **MEMORANDUM TO THE HONOURABLE LAWRENCE CANNON**

#### **SUBJECT**

(For decision) or (For signature) or (For approval) or (For information)

#### **SUMMARY**

#### **BACKGROUND**

#### **CONSIDERATIONS**

#### **NEXT STEPS or OPTIONS**

#### **RECOMMENDATIONS**



## **Environment Canada**

The headings below are drawn from Environment Canada's guidelines for memoranda to the Minister, as of July 2009. The guidelines state: "Not all headings are required, and different ones may be used as appropriate."

Always check to make sure that you are working with the current guidelines. Environment Canada may also have templates to ease the task of formatting.

**SECURITY CLASSIFICATION**  
**File Number**

### **MEMORANDUM TO MINISTER**

#### **TITLE**

(For Decision) or (For Information) or (For Signature) or (For Approval)

### **PURPOSE**

#### **SUMMARY**

### **CURRENT STATUS**

### **ISSUES**

### **CONSIDERATIONS**

### **DEPARTMENTAL POSITION**

### **OPTIONS**

### **RECOMMENDATION**

### **NEXT STEPS**

## **Finance Canada**

Finance Canada did not provide guidelines on the headings used in preparing briefing notes. It does, however, have templates for them.

## **Fisheries and Oceans Canada**

The headings below are drawn from DFO's guidelines for memoranda to the Minister, provided in response to an access to information request submitted in December 2013. DFO also has a separate concept of briefing notes for the Minister. Their format is almost identical to that shown below.

Always check to make sure that you are working with the current guidelines.  
DFO has templates to ease the task of formatting.

CLASSIFICATION

File Number

### **MEMORANDUM FOR THE MINISTER**

#### **TITLE**

(Decision Sought) or (Information Only) or (Signature Required)

#### **SUMMARY**

#### **Background**

#### **Analysis / DFO Comment**

#### **Recommendations / Next Steps**

## Foreign Affairs and International Trade Canada

The following is drawn from DFAIT's guidelines for briefing notes, provided in response to an access to information request submitted in December 2013. It appears that the following headings are dealt with in a separate attachment, whose format was not provided:

- BACKGROUND
- CONSIDERATIONS
- RESOURCE IMPLICATIONS
- COMMUNICATIONS IMPLICATIONS/ACTIONS
- PARLIAMENTARY IMPLICATIONS/ACTIONS

Always check to make sure that you are working with the current guidelines. DFAIT has templates to ease formatting.

### CLASSIFICATION

date stamp

File Number

### MEMORANDUM FOR ACTION or MEMORANDUM FOR INFORMATION

<b>TO:</b>	
<b>ISSUE:</b>	

<b>SUMMARY:</b>          <b>RECOMMENDATION(S):</b>
--

## Health Canada

The headings below are drawn from the Health Canada guidelines as of September 2009.

Always check to make sure that you are working with the current guidelines. Health Canada has templates to ease formatting.

**FOR INFORMATION or FOR CONCURRENCE or FOR A MEETING**

File Number  
Classification

**MEMORANDUM TO THE MINISTER OF HEALTH**

**Subject**

**SUMMARY** (in memos FOR INFORMATION or FOR CONCURRENCE)

**KEY MESSAGES** (in memos FOR A MEETING)

**BACKGROUND:**

**CURRENT STATUS:**

**CONSIDERATIONS:**

**PORTFOLIO CONSIDERATIONS:**

**OPTIONS AND RATIONALE:** (used in memos FOR CONCURRENCE)

**RESOURCE IMPLICATIONS:** (used in memos FOR CONCURRENCE)

**COMMUNICATIONS IMPLICATIONS:** (used in memos FOR CONCURRENCE)

**NEXT STEPS:** (used in memos FOR INFORMATION or FOR A MEETING)

**RECOMMENDATIONS:** (used in memos FOR CONCURRENCE)

## **Human Resources and Skills Development Canada**

The headings below are drawn from HRSDC's guidelines for memoranda to the Minister, as of July 2009. However, the guidelines are not clear on the order of presentation of the headings.

Always check to make sure that you are working with the current guidelines. HRSDC has templates to ease formatting.

File Number  
Classification (if applicable)

### **MEMORANDUM TO THE MINISTER OF HRSD**

#### SUBJECT

**FOR INFORMATION or FOR DECISION or FOR APPROVAL**

#### **PURPOSE**

#### **SUMMARY**

#### **BACKGROUND**

#### **CURRENT STATUS**

#### **CONSIDERATIONS**

#### **RECOMMENDATIONS or NEXT STEPS**

## **Indian and Northern Affairs Canada**

The headings below are drawn from INAC's guidelines for briefing notes for the Minister, as of October 2009. However, the guidelines are not clear on the layout of the headings.

Always check to make sure that you are working with the current guidelines. INAC may have templates to ease formatting.

Security Classification  
File Number

### **TITLE**

(Information for Minister) or (Decision by Minister)

### **SUMMARY**

### **BACKGROUND**

### **CURRENT STATUS**

### **ISSUES**

### **CONSIDERATIONS**

### **NEXT STEPS**

### **RECOMMENDATIONS (for Decision briefing notes)**

## **Industry Canada**

The headings below are drawn from Industry Canada's guidelines as of September 2009.

Always check to make sure that you are working with the current guidelines. Industry Canada has templates to ease the task of formatting.

### **ADVICE TO THE MINISTER**

#### **Subject**

#### **ISSUE**

#### **BACKGROUND**

#### **CONSIDERATIONS**

#### **ADVICE or CONCLUSION**



## **Justice Canada**

The headings below are drawn from Justice Canada's guidelines as of June 2010. Justice Canada also has more specialized formats for meetings and recommendations to appeal court decisions

Always check to make sure that you are working with the current guidelines. Industry Canada has templates to ease the task of formatting.

Security Classification  
FOR INFORMATION or FOR SIGNATURE

### **MEMORANDUM FOR THE MINISTER**

**Title**

**ISSUE**

**BACKGROUND**

*Sub-headings if needed*

**CONSIDERATIONS**

**CONCLUSION or RECOMMENDATION**

## **Natural Resources Canada**

The headings below are drawn from NRCan's guidelines as August 2009. Not all headings are required in all cases. The department allows considerable flexibility in the choice of headings. You may use other headings if appropriate.

Always check to make sure that you are working with the current guidelines. NRCan has WordPerfect templates to ease the task of formatting.

### CLASSIFICATION

File Number

### MEMORANDUM TO THE MINISTER

#### SUBJECT

**Information or Action or Decision Sought or Approval or Signature Required**

#### SUMMARY

**PURPOSE and/or ISSUE**

**BACKGROUND**

**CONSIDERATIONS**

**OUTLOOK**

**CURRENT SITUATION / STATUS**

**NEXT STEPS**

**ACTION PROPOSED**

**CONCLUSIONS or RECOMMENDATION**

## **Parks Canada**

Provided in response to an access to information request submitted in December 2013, Parks Canada did not have any guidelines on preparing briefing notes.

## **Privy Council Office**

The following are the headings PCO uses for an Information memorandum to the Prime Minister, provided in response to an access to information request submitted in December 2013. PCO did not provide examples of other types of memoranda.

Always check to make sure that you are working with the current guidelines. PCO may have templates to ease formatting.

### CLASSIFICATION

### MEMORANDUM FOR THE PRIME MINISTER

#### TITLE

(Information Only)

#### SUMMARY

### Background

## **Royal Canadian Mounted Police**

The following are the headings the RCMP uses for a briefing note for the Minister, as of the fall of 2009.

Always check to make sure that you are working with the current guidelines. The RCMP may have templates to ease formatting.

File Number

Security Classification

# **BRIEFING NOTE TO THE MINISTER OF PUBLIC SAFETY**

**ISSUE:**

**BACKGROUND:**

**CURRENT STATUS:**

**STRATEGIC ADVICE/RECOMMENDATIONS:** (if applicable)

**RECOMMENDED POSITION:** (if applicable)

## **Public Health Agency of Canada**

The headings below are drawn from PHAC's guidelines for memoranda to the Minister, provided in response to an access to information request submitted in December 2013.

Always check to make sure that you are working with the current guidelines. PHAC may have templates to ease formatting.

**FOR CONCURRENCE or FOR INFORMATION**

File Number  
Classification

### **MEMORANDUM TO THE MINISTER OF HEALTH**

#### **Subject**

#### **SUMMARY**

#### **BACKGROUND**

#### **CURRENT STATUS**

#### **CONSIDERATIONS**

#### **PORTFOLIO CONSIDERATIONS**

#### **Option and Rationale**

#### **RESOURCE IMPLICATIONS**

#### **COMMUNICATION IMPLICATIONS**

**RECOMMENDATIONS or NEXT STEPS**

## Public Works and Government Services Canada

The headings below are drawn from PWGSC's guidelines for memoranda to the Minister, as of July 2009. Most of the headings in the body are optional. You may also use the headings "Considerations" and "Conclusion".

Always check to make sure that you are working with the current guidelines. PWGSC has templates for formatting in Word Pro.

File Number

ADM: Name, number

DG: Name, number

CO: Name, number

### MEMORANDUM TO THE MINISTER

SUBJECT

TITLE

FOR INFORMATION or FOR DECISION

SUMMARY

TIMEFRAME

BACKGROUND

ISSUE(S)

OPTIONS

NEXT STEP(S)



## RECOMMENDATION

## **Statistics Canada**

The headings below are drawn from Statistics Canada's guidelines for memoranda to the Minister, provided in response to an access to information request submitted in December 2013.

Always check to make sure that you are working with the current guidelines. Statistics Canada may have templates to ease formatting.

### **MEMORANDUM**

**DATE:**

**TO:** The Honourable Tony Clement  
Minister Responsible for Statistics Canada

**FROM:** Munir A. Sheik

**SUBJECT:**

**SUMMARY:**

## **Transport Canada**

The headings below are drawn from Transport Canada's guidelines as of September 2009. The guidelines do not provide the layout or precise format.

Always check to make sure that you are working with the current guidelines. Transport Canada may also have templates for briefing notes that vary from what is shown below.

### **MEMORANDUM TO THE MINISTER**

#### **Subject**

For Information Only or For Decision or For Signature

#### **SUMMARY**

#### **BACKGROUND**

#### **CONSIDERATIONS or CURRENT STATUS**

#### **NEXT STEPS/OPTIONS**

#### **RECOMMENDATIONS or DEPARTMENTAL POSITION**

#### **COMMUNICATIONS ASSESSMENT (if For Decision or For Signature)**

## Treasury Board Secretariat

The headings below are drawn from TBS's guidelines as of September 2010.

Always check to make sure that you are working with the current guidelines.  
TBS also has templates to ease formatting.

For Information or For Decision or For Signature  
or Briefing or Invitation or Meeting

MEMORANDUM TO THE PRESIDENT

**SUBJECT**

SUMMARY

**Background**

**Recommendation** [for all memoranda except "For Information" and "Meeting"]

## **Veterans Affairs Canada**

The headings below are drawn from Veterans Affairs Canada's guidelines provided in response to an access to information request submitted in December 2013. The guidelines state that a covering memo to the Minister is also required.

Always check to make sure that you are working with the current guidelines. Veterans Affairs may have templates to ease formatting.

### **BRIEFING NOTE FOR THE MINISTER OF VETERANS AFFAIRS**

**Issue**

**Background**

**Current Situation**

**Communications**

**Options and Recommendation** (if the briefing note is for concurrence)

## **Western Economic Diversification Canada**

Western Economic Diversification provided guidelines on the layout, but not the headings, used for briefing material, provided in response to an access to information request submitted in December 2013.

Always check to make sure that you are working with the current guidelines. The department may also have templates for briefing notes.