Preparing Briefing Notes for Leadership

Description:

This tool provides an overview, best practices, and a template for preparing briefing materials for leadership.

How it can be used:

Within your context, leadership can be the Health Board, Health Committee, Health Councillor or the Band Chief and Council. It is important to remember that generally, these bodies are mainly focussed on the 'big-picture' strategic operations and required that reports and presentations need to be clear, 'to the point', and relevant. As with any type of reporting, preparation is the key to effective briefing notes.

Use the information below to help create effective, relevant, and brief documents for your leaders.

What is a briefing note?

A briefing note is a concise document that is used to communicate key information. An effective briefing note is focused on a single issue or central theme and it needs to have a well-defined subject.

When would you use a briefing note?

It is generally used in the following circumstances:
- To inform or follow up on an issue;
- To request a decision or approval;
- To help plan for an event or presentation that leadership needs to give;
- To avoid a potentially damaging or embarrassing situation or inform leadership about such.

How would I structure a briefing note?

It's important to "know your audience" when creating a briefing note.
- Understand your leaders' perspective and concerns.
- Do not assume they have the same deep understanding of the issue as you have.
- Anticipate the types of questions that your leaders would have and incorporate the answers clearly into your briefing note.

Keep your briefing note short – two pages maximum or use a pre-developed template if this is used by your organization or leadership.
- Be clear and concise. Keep sentences and paragraphs short.
- Make a plan and focus on the key issues. Focus on quality content, not quantity of information.

The purpose of a briefing note is to help leaders understand an issue or situation quickly and well enough so they can make a decision or be "brought up to speed".

- Get quickly to the point and present the most important information first.
- Present information in small and manageable "chunks" so it is easy to follow. Use a paragraph for each idea.
- Use bullets or tables to present information clearly.
- Avoid using "flowery" language or overly descriptive adjectives or adverbs. Keep the messages clear.
- Use the active voice and action verbs. For example, use "our organization will begin our health and wellness planning process in January", rather than "the process for health and wellness planning will be beginning in January".

What type of content would be in a briefing note?

- Start with the key issue of the briefing note. This must be clearly stated up front. Don't use ambiguous or vague statements.
- Summarize what you want leadership to understand first. Provide enough information to support decision-making, but don't overwhelm with details.
- Avoid technical jargon, abbreviations, and acronyms.
- Provide pertinent, complete, objective, and clear information based on your analysis. Don't present unsubstantiated or biased arguments. Avoid offering your personal opinions; stick to the concrete facts. Be sure that you have checked all your facts.
- Make clear recommendations that are supported by the facts you've already provided.
- State the consequences of not pursing the recommended approach. Be careful not to overstate or diminish the situation.
- Ensure all information is in the content, and don't introduce any new concepts or elements in the closing or recommendations.
- Use appendices sparingly. Don't overwhelm leadership with unnecessary details.

Briefing Note Template

Opening – this provides an introduction and states up front what is being asked of the reader.

1. **Purpose** – *Begin the note with a clear statement identifying the purpose of the note. Is this for information or for a decision?*

2. **Issue** – *What is the key issue being addressed? Be clear and concise.*

Body of the Briefing Note – the format will depend on what you need to accomplish with the briefing note. You can use some or all of the following sections.

3. Background – *begin with the most recent developments. Avoid starting at the beginning and lead to the current issue. The purpose is not to provide a chronology of events but in frame the issue.*

4. Current Situation – *a snapshot of what the situation is right now. It is not a chronology or sequence of events.*

5. Key Considerations – *an outline of the valuable that can be considered. Include the "pros and cons" or both sides of a story if relevant.*

6. Conclusion or Next Steps – *this can include your opinion (if relevant) as long as it is based on the previous information. This can be a gentler approach to offering recommendations.*

7. Options and Recommendations – *a more formal, balanced, and objective approach to the choices and possible courses of action. If you provide recommendations, then offer options that outline the costs and benefits of each option. This could replace the "Key Considerations" or "Conclusions" section.*