



BRIEFING NOTE FOR THE MINISTER

Subject: Adoption of a uniform standard
for briefing notes at Economic Advancement Canada

Issue

At Economic Advancement Canada (EAC), different divisions, directorates and branches have different standards for briefing notes. Standards may also change with changes in incumbents in executive positions. This can needlessly cost millions of dollars while frustrating all involved. Ultimately, it can detract from outcomes.

Background

A briefing note is a key tool of access to leaders — to influence their decisions, their actions and their understanding of issues. Authors of briefing notes (and their managers) are expected to deliver expert insight and strategic acumen with brevity, clarity and professionalism. Beyond that, it must all be presented with an optimal format, organization and style.

Considerations

The briefing notes process incurs hidden costs in four areas (see [ANNEX A](#) for details):

- author competencies in writing briefing notes;
- varying standards from one unit to another and with changes in incumbents;
- the many steps of review that a briefing note must undergo; and
- opportunities that are lost when sound ideas are presented in ineffective briefing notes.

[ANNEX B](#) estimates that 72,333 hours of staff time (valued at \$3.76 million) per year could be saved by adopting a uniform standard for briefing notes across the department. This comprises the time spent in drafting, reviewing and revising briefing notes prepared for the Minister, the Deputy Minister, the Associate Deputy Minister, and other officials in the EX group at EAC.

The following are three options for responding to the status quo.

Option 1: Take No Action. This option would have the benefit of not obliging any unit to follow another set of rules. However, it would not address the hidden costs set out in Annex A or achieve the time savings shown in Annex B.

Option 2: Provide Training. Under this option, all who prepare briefing notes would receive training. The Canada School of Public Service offers a one-day training program at no cost to participants. Private-sector costs run from \$223 to \$675 per day per person.

However, this option has drawbacks. Even when offered for free, training requires a significant time commitment from participants. Beyond that:

- A day or two of training may not be sufficient to change long-engrained habits.
- A day or two of training would not address most of the hidden-cost problems set out in Annex A and would be unlikely to achieve the time savings shown in Annex B.
- The techniques, formats and styles provided by the training may not be reinforced, and may even be opposed, upon the participant's return to his or her unit — leading to more frustration for all.

Option 3: Adopt a Uniform Standard. Under this option, a uniform standard would be developed and adopted across EAC. The standard would be:

- simple and self-instructing; and
- reinforced by staff who can guide authors to specific areas of the standard that show how they can improve their briefing notes.

ANNEX C outlines the benefits and limitations of Option 3. Benefits include:

- producing and processing improved briefing notes faster and with less effort;
- developing skills that would have enduring value throughout the department; and
- enhancing accountability, professional pride and workplace well-being.

One possibility for how such a standard might look is found on this [Web page](#).

Conclusion

An opportunity exists to enhance the outcomes achieved through briefing notes while saving thousands of hours of time at all levels of the department.

With management support, a uniform standard for briefing notes across EAC could yield very high dividends at a low cost.

Rob Parkinson

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Attachments: (3)

Annex A

The Hidden Costs of Briefing Notes

The hidden costs listed below have been cited repeatedly by federal public servants in dozens of briefing notes workshops that the author has led since 2009. Managers and executives at EAC voiced similar concerns to the author in interviews in 2012.

AUTHOR COMPETENCIES IN WRITING BRIEFING NOTES

Writing a briefing note is complex. It requires addressing many distinct but related tasks. Some authors lack knowledge and skills in these matters. They find briefing notes to be challenging, time-consuming and frustrating — even though they can write well. They may write briefing notes only rarely, which affords only limited opportunity to practice and develop skills in the task.

VARYING STANDARDS

Standards for briefing notes vary by branch, directorate and division within EAC. Beyond that, the standards are not well documented. Learning to write a briefing note for a given signing authority can be a matter of trial and error. This can give rise to number of frustrations and time-consuming problems:

- Staff must often learn how to write briefing notes for each different audience. They must also to learn anew when they move from one branch, directorate or division to another.
- The standards may change when there is a change in incumbents at senior levels, leading to yet another learning process.
- If the standards are vague or unevenly applied, all involved can become incensed. Authors resent not knowing what is acceptable and what is not, while managers and executives bristle at receiving briefing notes that do not meet their needs.
- Conversely, if the standards are clear but too rigid, authors can be stymied in their efforts to convey important advice and information.

STEPS OF REVIEW BY INTERMEDIARIES

In its journey to its ultimate audience, a ministerial briefing note must be read, understood and endorsed by at least five managers and executives, plus seven or more administrative assistants, executive assistants, policy advisors, briefing officers and chiefs of staff. Their work can add value, but it can also create problems:

- Intervention by intermediaries can be time-consuming — sometimes critically so.
- In editing, intermediaries may inadvertently blur a subtle nuance that, while it appears minor, has major implications for matters of law, policy, programs or management.

- Authors resent it when intermediaries edit their work without consulting them. Yet they may also object when their work is returned to them to be rewritten.
- Questions can surface over whether intermediaries are editing to apply the standards of senior executives, or editing only to reflect their personal preferences.

LOST OPPORTUNITIES

The fact that a briefing note is poorly written does not necessarily mean that the ideas it espouses are poor. Costs are incurred when sound ideas are presented in ineffective briefing notes and, as a result, fail to gain support from upper management.

Annex B

Estimated Potential for Saving Time and Money

This annex estimates that 72,333 hours of time (valued at \$3.85 million) per year could be saved by adopting a uniform standard for briefing notes across EAC.

BRIEFING NOTES FOR THE MINISTER

In 2012, Economic Advancement Canada (EAC) prepared 1,157 briefing notes for the Minister of Economic Advancement.

For each ministerial briefing note, it is estimated that there is potential to save three hours of writing and processing time by adopting a uniform standard across the department.

This assumes that for each briefing note:

- one hour could be saved in the time the author requires to write and revise; and
- ten minutes could be saved in the time taken at each step of review by 12 managers, executives, and other officials such as executive assistants and policy advisors.

Using the figure of 1,157 briefing notes per year, the total saved per year would be as follows for ministerial briefing notes across the department:

$$1,157 \times 3 \text{ hours} = 3,471 \text{ hours}$$

BRIEFING NOTES FOR THE DM AND THE ASSOCIATE DM

In 2012, EAC's Deputy Minister and Associate Deputy Minister received 2,975 briefing notes from the department.

For each such briefing note, it is estimated that there is potential to save two and a half hours of writing and processing time by adopting a uniform standard across the department. This assumes that for each briefing note:

- one hour could be saved in the time the author requires to write and revise; and
- ten minutes could be saved in the time taken at each step of review by nine managers, executives, and other officials such as executive assistants and policy advisors.

Using the figure of 2,975 briefing notes per year, the total saved per year would be as follows for briefing notes to top executives from across the department:

$$2,975 \times 2.5 \text{ hours} = 7,437 \text{ hours}$$

BRIEFING NOTES PREPARED FOR OTHER EXECUTIVES

In January of 2014, employees in the EX category formed 8.3 percent of EAC's workforce. This works out to about 91 EXes for a workforce totaling 1,105 full-time equivalents. This paper will assume that each of those EXes receives two briefing notes per working day, or about 450 per year.

For each such briefing note, it is estimated that there is potential to save one and a half hours of writing and processing time by adopting a uniform standard across the department. This assumes that for each briefing note:

- one hour could be saved in the time the author requires to write and revise; and
- ten minutes could be saved in the time taken at each step of review by an average of three managers, executives, and other officials such as administrative assistants and advisors.

Using the figure of 450 briefing notes per year per EX, the total saved per year would be as follows across the department:

$$450 \times 1.5 \text{ hours} \times 91 \text{ EXes} = 61,425 \text{ hours}$$

TOTAL TIME SAVINGS ON BRIEFING NOTES

Ministerial Briefing Notes:	1,157 x 3 hours =	3,471 hours
Briefing Notes to DM & Assoc. DM:	2,975 x 2.5 hours =	7,437 hours
Briefing Notes to EXes:	450 x 1.5 hours x 91 EXes =	61,425 hours
TOTAL		<hr/> 72,333 hours

DOLLAR VALUE OF THE TIME SAVED

This paper arbitrarily assigns an average value of \$53.20 per hour to the time cited above (\$40.00 per hour in salary, plus 20 percent for benefits and 13 percent for accommodation).

At that rate, the value of the total time saved is:

$$72,333 \text{ hours} \times \$53.20 = \$3.85 \text{ million}$$

Annex C

Benefits and Limitations of a Uniform Standard for Briefing Notes

BENEFITS

An Enhanced Briefing Notes Process

A well-designed standard for briefing notes would serve as a vehicle for training authors. It would enable and empower authors by providing quick access to the tools, techniques and knowledge they need to prepare effective briefing notes. The standard would:

- make the job of writing a briefing note faster and less stressful than it is now;
- help authors to write briefing notes that are easy for all to read and understand;
- reduce the need for intermediaries to revise briefing notes or send them back to authors for revision;
- help ensure that sound ideas earn appropriate support at senior levels; and
- contribute to accountability, professional pride and workplace well-being.

A Learning Process

Over time, and with management support, authors would acquire lasting skills in writing more effective briefing notes with less effort. They would learn to:

- identify the distinct tasks involved in writing a briefing note and approach those tasks with confidence;
- lay sound foundations for briefing notes to avoid problems before they happen;
- approach briefing notes with a more strategic perspective;
- define and manage the timelines involved in preparing briefing notes;
- make well-informed decisions in selecting cogent content and delivering it in appropriate degrees of detail;
- place predictable types of information in predictable places in a briefing note;
- organize information effectively within each section of a briefing note; and
- write in a clear and crisp style — using short words, short sentences and active verbs.

LIMITATIONS

The standard would not resolve problems that stem from a poor command of grammar or weak basic skills in writing. Such problems require individual remedial action plans.