Annex A.

Headings Used in Briefing Notes for the Minister

Contents

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.
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.
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.
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.

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.]
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.
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.
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
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.
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**
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.

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.
MEMORANDUM FOR THE MINISTER

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

SUMMARY

Background

Analysis / DFO Comment

Recommendations / Next Steps
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.
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)
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
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.
<table>
<thead>
<tr>
<th><strong>Industry Canada</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>The headings below are drawn from Industry Canada’s guidelines as of September 2009.</td>
</tr>
<tr>
<td>Always check to make sure that you are working with the current guidelines. Industry Canada has templates to ease the task of formatting.</td>
</tr>
</tbody>
</table>

**ADVICE TO THE MINISTER**

**Subject**

**ISSUE**

**BACKGROUND**

**CONSIDERATIONS**

**ADVICE** or **CONCLUSION**
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.
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.

MEMORANDUM FOR THE PRIME MINISTER

TITLE

(Information Only)

SUMMARY

Background
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.

BRIEFING NOTE
TO THE MINISTER
OF PUBLIC SAFETY

ISSUE:

BACKGROUND:

CURRENT STATUS:

STRATEGIC ADVICE/RECOMMENDATIONS: (if applicable)

RECOMMENDED POSITION: (if applicable)


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
MEMORANDUM TO THE MINISTER

SUBJECT

TITLE

FOR INFORMATION  or  FOR DECISION

SUMMARY

TIMEFRAME

BACKGROUND

ISSUE(S)

OPTIONS

NEXT STEP(S)
RECOMMENDATION
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:
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)
MEMORANDUM TO THE PRESIDENT

SUBJECT

SUMMARY

Background

Recommendation [for all memoranda except “For Information” and “Meeting”]
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 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.