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 notes on how to use it. Note how 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 Recommendations or Advice or Strategic Advice or Recommended Position

Other Headings Used by Some Departments

These 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.

Departmental Position
This would form part of Considerations in the most commonly used headings
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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 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 as of August 2009. 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.

<div align="right">

CLASSIFICATION

</div>

MEMORANDUM TO THE HONOURABLE JEAN-PIERRE BLACKBURN

<div align="center">

SUBJECT

</div>

PURPOSE

<div align="center">

SUMMARY

</div>

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, as of August 2009.
>
> 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) <u>or</u> (For Signature) <u>or</u> (For Decision) <u>or</u> (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, as of August 2009. 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.

MEMORANDUM FOR THE MINISTER

TITLE

For Decision or **For Information**

PURPOSE

SUMMARY

CONTEXT

CONSIDERATIONS

RECOMMENDATION   [or **CONCLUSION**]

Citizenship and Immigration Canada

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

TITLE

Issue:

Background:

Summary:

Current Status:

Discussion:

Analysis:

Implications:

Key Findings:

Options:

Recommendation:

Next Steps:

Required Action:

Transformation Considerations:

Conclusion:

Department of National Defence

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

<div align="right">

SECURITY CLASSIFICATION
File Number

</div>

MEMORANDUM TO MINISTER

<div align="center">

TITLE
(For Decision) <u>or</u>   (For Information) <u>or</u>   (For Signature) <u>or</u>   (For Approval)

</div>

PURPOSE

<div align="center">

SUMMARY

</div>

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, as of August 2009. 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

<u>**TITLE**</u>
(Decision Sought) <u>or</u> (Information Only) <u>or</u> (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, as of August 2009. 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.

<u>**CLASSIFICATION**</u>

date stamp

File Number

MEMORANDUM FOR ACTION
<u>or</u>
MEMORANDUM FOR INFORMATION

TO:	
ISSUE:	

SUMMARY:
RECOMMENDATION(S):

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 <u>or</u> FOR CONCURRENCE <u>or</u> 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.

<div align="right">

Security Classification
File Number

</div>

<div align="center">

TITLE
(Information for Minister)   <u>or</u>   (Decision by Minister)

</div>

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

<u>**Subject**</u>

ISSUE

BACKGROUND

CONSIDERATIONS

ADVICE <u>or</u> **CONCLUSION**

Justice Canada

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

CLASSIFICATION

File Number

MEMORANDUM TO THE MINISTER

SUBJECT

Information <u>or</u> **Action** <u>or</u> **Decision Sought** <u>or</u> **Approval** <u>or</u> **Signature Required**

SUMMARY

PURPOSE and/or **ISSUE**

BACKGROUND

CONSIDERATIONS

OUTLOOK

CURRENT SITUATION / STATUS

NEXT STEPS

ACTION PROPOSED

CONCLUSIONS or **RECOMMENDATION**

Parks Canada

As of August 2009, Parks Canada did not have any guidelines on preparing briefing notes.

Privy Council Office

CLASSIFICATION

MEMORANDUM FOR THE PRIME MINISTER

TITLE

(Information Only)

SUMMARY

Background

Royal Canadian Mounted Police

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

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 <u>or</u> **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, as of August 2009.

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

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 <u>or</u> For Decision <u>or</u> For Signature
<u>or</u> Briefing <u>or</u> Invitation <u>or</u> Meting

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 as of August 2009. 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, as of August 2009.

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