Preparing Effective Briefing Notes
Presented by Susan Doyle of The Advocacy School
June 20, 2013

Webinar Notes
Prepared by Lorna McCue

The following notes have been made from a podcast prepared as a pre-webinar briefing and the June 20 HC Link webinar: "Preparing Effective Briefing Notes", by Advocacy School Instructor Susan Doyle of the University of Victoria.

Introductory Podcast

Most of us have been writing in varying capacities for many years, and we don’t tend to stop to think about how we approach a writing task and what works and doesn’t work. Here are 3 steps that will help

1. Understand your task
   • What do you write and for what purpose?
   • Who do you write for?
   • How effective are you as a briefer?

You can think of briefing notes as falling into two categories: generally they are to inform or to solve a problem.

Briefing Note for Information: describes or explains the issue; e.g. may report the results of a study or a meeting, or advocate for a position

Briefing Note for Decision: sets out to solve a problem or reach a decision. In this type of note you usually analyze or evaluate an issue, explore options and present one or more recommendations.

In many cases your briefing note has to both inform and attempt to solve a problem. Most of what we write has more than one purpose; e.g. we may be writing primarily to analyze a community health issue and recommend solutions, but we may also be trying to gain the attention of specific group of readers, or it might be one step in a long-term strategy, or how a solution will fit with other solutions we have found for other programs. We often only focus on the obvious task at hand and forget that we are attempting to change or move minds, to strategize and build relationships.

Our defined purposes will function as a compass to guide us as we develop our ideas. Whenever we lose our way in our work, reviewing the purposes will point us back in the
right direction. As you think about your briefing note, consider the purposes, both general and specific, obvious and implied, that you write for.

The second question is who do you write for? If possible, put faces on them. Are they experts, general public, decision makers? What are their reasons for reading? Do they want to be informed, to learn, to be persuaded? To find out what you plan to do? What are your readers’ chief concerns? What will appeal to them and what is likely to put them off? The more detailed and the picture you have of your readers, the more targeted and focused your writing will be.

These two pieces, a clear, detailed picture of your readers and a clear understanding of your purposes, will actually give you all the information you need to decide what you are going to write, the tone and style to use, how long your briefing note should be, what to include in and what to leave out, and every other decisions you need to make.

**How effective are you as a briefer?**

This question isn’t about your writing or editing skills, but about how well your writing achieves its purposes for its intended readers. Think about your strengths and weaknesses as a writer. Perhaps you have excellent grammar but have difficulty organizing your thoughts on paper. The following questions may help guide your reflection:

- What writing process do you use? Do you plan an outline or do you dive right in? Do you go through multiple drafts or do you try to get everything right in a single pass? How much time do you spend editing? One of ways to become a more effective writer is to use an effective writing process.
- What are your strengths as a writer? You may know these from what others have told you, Understanding where you are now as a writer is the first step in improving,
- What are your shortcomings as a writer?
- What do you dislike most about writing briefing notes? What are the obstacles that get into your way as a briefer?
- What do you hope to learn from the June 20th workshop? The answers to these questions will help you set your goals for the webinar.

Finally, please prepare a briefing issue to work on. We will be going through the main parts of a basic briefing note and it will benefit you more if you have a particular situation in mind. If there isn’t an appropriate issue relating to your work, choose an issue in your personal life; e.g. local transportation, health, safety or environmental issues. Try to keep your issue local and manageable. Briefing notes work best for focussed issues that can be examined in a few pages. Try to state the issue in a single sentence, and consider the purpose, what you hope the briefing note will achieve, who
your readers will be what they care about and what will appeal to them. This preparation will make the webinar more productive.

---

**HC Link Webinar: Preparing Effective Briefing Notes**  
**June 20th, 2013**  
**Presented by Susan Doyle, Advocacy School Instructor**

**Slide 1: Title and date**

Hélène Lussier of HC Link welcomed participants, provided technical information and introduced presenter Susan Doyle, who joined the conference from Victoria. Susan commented on the diversity of the participants, noting that the webinar had attracted people from a variety of situations and locations.

This webinar is a shortened version of the workshop and effective writing course Susan teaches at the University of Victoria. She has condensed the material into an hour and a half and tried to cover as much as possible that will be of value to the participants.

She, with Hélène’s assistance, used polls and chat rooms to ask participants about their experiences and opinions. Participants were also able to post questions in the chat room.

**Slide 2: Welcome and Webinar Objectives:**

When participants leave the webinar they will have a better understanding of:

- What are briefing notes and what are they useful for?
- What makes a briefing note effective?
- How to plan, develop and edit briefing notes
- How to become a better briefing note writer

**Poll 1: Did you listen to the podcast portion of the webinar?**

A screenshot of the poll is shown below as an example of how the poll function was used.
Susan asked participants to reflect on their experiences as a writer throughout the session.

“I know that people hope that I will just give you some tips that will make you an excellent writer, but reflection is an important part of getting better at anything. In fact the OWCD has recently issued a new set of competencies for the 21st century, and they call reflection the heart of their key competencies."

Slide 3: The structure of the webinar will be:

- Briefing notes overview
- Some rules for writing well
- Tips for writing effective briefing notes
- Questions

The more able you are as a writer in general, the better briefing note writer you will be.

Slide 4: Overview: What are briefing notes and what are they useful for?

- Information
- Problem solving
- Proposals
- Strategic inquiry/policy development

Poll 2: How would you describe your level of experience writing briefing notes?
Participant responses were mixed.

Susan explained that briefing notes are very short, focused documents that are characterized by their conciseness and are used in all sorts of settings. They are
commonly used in government but their use has spread to all kinds of organizations because they are so useful for people that are dealing with a lot of issues and need to understand them before making decisions. It presents an issue or topic in a way that decision makers can grasp and get a basic understanding with as little effort as possible. They are popular because we are all so busy and have a lot to read. The well-written briefing note lets us get a clear picture of an issue or topic without spending a lot of time delving into it.

Briefing notes explain or report on a problem or issue; it may be a summary of a research report, notes from an important meeting, or a description of a pressing health concern to instruct other people. Presenting a description or explanation for the reader gets a quick understanding. The second type involves the analysis of an issue, and presents options and recommendations. Proposals are a form of an information briefing note that we use when meeting with funders or trying to persuade an audience. A strategic inquiry is really a form of the problem-solving briefing note, which examines and analyzes a situation to help develop policy. The briefing note is an instrument through which we provide information and sometimes analysis and recommendations to help decision makers have a clear picture of what they are dealing with.

Poll 3: Thinking of the briefing note topic you prepared for the webinar, how would you describe the purpose or purposes?
Participants were evenly divided on their responses between “informational” and “problem-solving”.

Briefing notes can be used for any situation where you are trying to give someone a clear picture of a topic or situation. We often want to go through the exercise of going through it ourselves, to clarify our own understanding. You may want to send a briefing note to someone you plan to meet with in preparation for the meeting, so they have a good idea of what you want to talk about.

From the writer’s point of view, the briefing note is effective when it achieves what you hope the audience would get from it. From the reader’s point of view it is effective when it rewards the time and effort in reading it with a gain in knowledge or understanding that is useful to them. Sometimes we start reading a briefing note but it is not worth the effort.

Slide 5: What makes a briefing note effective?
- It has an immediately clear focus
- It is as short as possible
- It achieves a strategic purpose

Susan noted that senior managers often ask her in her teaching to get across that they want to know immediately what this is about. If they feel in the first few minutes that
they don’t know what it is about they will stop reading it. Some briefing notes are limited to one or two pages – this can be a major challenge. Try to keep in mind that readers expect it to be as short as possible. The briefing note should move you closer to your goal, for whatever group you are working on behalf of.

**Poll 4: Briefing notes self-evaluation**
Susan asked participation to think of briefing notes or similar documents they have written and rate their effectiveness. Most people rated themselves as mostly or somewhat effective.

Effective briefing notes are very valuable for advocacy.

**Slide 6: What is the role of briefing notes in advocacy?**
- Familiar to government decision makers – readers will be receptive to and expect this type of communication
- Convenient structure for argument and problem solving – natural logic that will lead to conclusions and recommendations
- Clarifies issues and strategies – for yourself and others; we need to be as clear as possible when presenting arguments to others
- Helps the reader promote your ideas – when you explain something that makes it clear to them, they will be able to explain it to others and help spread the word

**Poll 5: How important is the role of briefing notes in your work?**
More than half of the participants felt that briefing notes were either crucial or very important to their work.

Susan noted that while advocacy can be furthered by briefing notes, it is difficult to find examples of effective ones used for that purpose.

**Slide 7: What can go wrong?**
- Too many purposes
- Lack of focus
- Too much information
- No connection with the reader
- Too much work for the reader

**Poll 6: Which of the following problems do you struggle with?**
Participants were asked to select options from the list provided or enter another problem in the chat box. The two most common problems were “isolating our purpose” and “problems with providing too much information”. Other options checked by participants included:
“When to send a briefing note” – this would depend on the issue and the purpose you are dealing with.

“Staying neutral or objective” – this is sometimes difficult, as we can be pressured to take a stance. We aim to be objective but sometimes can’t be. In terms of advocacy you may be proposing a certain point of view that is reasoned and well-argued – this can still be objective, but not necessarily neutral.

“Addressing multiple stakeholders” - it is important to analyze the audience and identify the primary and perhaps a secondary audience.

In the next segment of the presentation, Susan talked about writing in general. While many people would like to have a recipe that gives step-by-step instructions on how to write an excellent briefing note, the reality is that writing is a little bit like cooking. If you’ve ever had the experience of following a recipe and having a disappointing result, writing is a little bit the same. If you become a good cook, you can take any recipe and make it successful. Because in both cases we expect that we get better as we practice; we learn new techniques and we improve as we go.

**Slide 8: A few things to remember about writing:**
- Writing takes effort
- Improvement is ongoing
- The effort is worthwhile

Some of you may be familiar with Malcolm Gladwell’s book about mastery, in which he proposed that people need 10,000 hours to master a musical instrument or a foreign language. I don’t know what the comparable number would be for writing but certainly we get better as we practice. Improvement is ongoing and a product of our practice and is worthwhile.

**Slide 9: Self-evaluation of abilities as a writer:**
*Polls 7-10:* These questions were designed to make participants reflect on where they are now as a writer. Susan discussed the results of the poll, concluding that the real value of the questions is to make you think about where you are now and in what areas you need to improve.

**Slide 10:**
- In general, how do people respond to your writing?
- What do you most need to work on to be a more effective writer?
- Any other issues?

Think for a second about what you know about your writing from other people’s point of view - co-workers, teachers, supervisors. It is important to be honest with ourselves about what we know from others as it helps to identify what we need to work on.
Participants were invited to use the chat room to identify other issues. For most of us organization is one of the most challenging things we have to do and that is where the most effort comes in; what are we going to write and how are we going to write it. One participant used the chat box to comment that it is challenging to write at different levels from highly academic to community level reading.

Susan responded that it is important to identify the context and the audience for our writing. In university we are expected to write in a very formal, academic style which is not particularly readable. Some academics are the worst writers as they write very formally, with government a close second, especially when they are developing policy statements. The problem is that when they go to talk to people outside these communities, by anybody’s standard it is not a particularly readable style. It takes a particular effort to reach people who are not part of the group we usually talk to.

**Slide 11: Three rules for writing well**
- Plan more, write less
- There is no right or wrong, just better or worse
- Editing makes the difference

These rules apply in any circumstance and address the problems we just discussed. In the first rule we are looking at planning and editing your writing.

**Slide 13: Plan more, write less.**

**The 40-20-40 approach**

*Planning* (40% of your time) includes all of the activities we do before we actually start putting our sentences down. It includes thinking, concept mapping and brainstorming - someway to generate your ideas. It may involve researching and outlining.

*Drafting* (20%) is getting our raw thoughts down.

*Revising* (40%) is shaping and crafting it into the document you want.

Spending more time planning your document means you write less because if you zero in on your purpose and identify the questions that your briefing note needs to answer, you will struggle less with writing the content.
Slide 14: There is no right or wrong, just better or worse

<table>
<thead>
<tr>
<th>Better (for example)</th>
<th>Worse (for example)</th>
</tr>
</thead>
<tbody>
<tr>
<td>single, clear focus</td>
<td>multiple focuses</td>
</tr>
<tr>
<td>short, focused points</td>
<td>long, dense paragraphs</td>
</tr>
<tr>
<td>a clear narrative flow</td>
<td>isolated chunks</td>
</tr>
<tr>
<td>Complete</td>
<td>missing information</td>
</tr>
<tr>
<td>reader-oriented</td>
<td>no reader context</td>
</tr>
</tbody>
</table>

If you eliminate the bad you will automatically end up with a better document. Like all intellectual exercises, there is no simple answer. There is no point in trying to think “what is the right way to do this?” just think about what would be better and eliminate those that are worse.

Slide 15: Editing makes the difference

- in determining focus
- in ensuring conciseness
- in determining readability
- in ensuring strategic value

We need to cut away what is superfluous, make it more readable, sentences and paragraphs shorter and clearer, and make sure that what is written has strategic value.

Slide 16: Some tips for writing better briefing notes

Susan opened up two chat boxes, with instructions in a third box. Two volunteers used the chat boxes to identify issues on which they would like to write a briefing note. One was about trying to get a bike rack installed at a school and the other was to stop an application for a license for a gravel pit. She then moved on to the next slide, with the promise to return to the chat boxes and further develop the briefing notes.

Slide 17: Tip 1: Get your purpose straight

- If you aren't sure about what you want your briefing note to do, your reader won't be either.
- If your thinking is muddled, that is how the reader will respond to your writing.
- Readers will grasp your message more easily when they can see it immediately.

Give your purpose to the reader as clearly as you can - this is done in two placed; in the title and in the issues statement.
Slide 18: Take a minute to consider, for the example you have in mind:

- What is your purpose?
- How can you capture that in your title?
- In your purpose/issue statement?

The two volunteers entered their titles and issues statement in each of the 2 chat boxes, continuing from the previous chat box exercise, with additional instructions shown in the third chat box; i.e. “Write a briefing note in one sentence on an issue from work or your personal life. Keep it small and local. Consider the purpose and the audience.”

Susan suggested that for ideas we could look at newspapers. They are masters at writing titles and subtitles. It is so important to be able to put the heart of the matter in a short headline. Titles are not usually full sentences; e.g. “Bike racks encourage physical activity” or “Gravel Pits Negatively Affect Quality of Life”.

Then ask “what is significant about the issue?” The issue statement then elaborates the title into one or two sentences, often in the form of a questions; that is what the rest of the briefing note has to deliver on.

Slide 19: Tip 2: See things from your reader’s point of view instead of your own

This is one of the hardest things to learn, especially for those that have been involved in academic studies - not writing for anyone. We want to reach readers.

“On the whole, the difficult thing about persuading others is not that one lacks the knowledge needed to state his case nor the audacity to exercise his abilities to the full. On the whole, the difficult thing about persuasion is to know the mind of the person one is trying to persuade and to be able to fit one’s words to it.”

(Han Fei Tzu, quoted in Meltsner, 1980: 125-126)

Slide 20: Readers’ questions*

- How will this help me?
- Is this a good use of my time?
- Do we speak the same language?

We mean language both figuratively and literally. Can I understand what this writer is talking about and also are they talking about things that matter to me. Having someone look at your briefing note might give you some valuable feedback.

*(adapted from Armstrong & Terrell Thinking Like a Writer, 2009)

Slide 21: Questions for you to answer
- What do they already know?
- What do they want to know?
- How can I help them understand?

In what ways can I develop the content in a way that will easier for them to understand, in the way I approach them, the attitude I have towards the issues, how I present my own thoughts about it? All of these things need to be considered as you think about how to best reach your audience.

One of the things we often overlook is that we tell them a lot of things they already know. We want to know what they already know to identify gaps in knowledge but also what we don’t have to tell them. Think about what questions they want you to answer.

**Slide 22: Take a minute:**
- In what ways can you see things from your reader’s perspective?
- What does that mean for your BN?

Is your reader going to be skeptical, are they going to be oppositional or dislike what you are telling them? Think about all the possibilities of how they might react, and how that might change how you present your briefing note.

The two chat boxes were displayed again, and volunteers wrote their ideas about how their readers might react to their briefing note. It was noted in the chat box that the school board might be skeptical or oppose the idea of bike racks at the schools. The municipality might be in favour of granting the licence to the gravel pit due to infrastructure implications and the possibility that, if refused, they would appeal to the Ontario Municipal Board which tends to favour gravel pits.

If you are trying to persuade people you have to find a way to get them on your side; e.g. make it a health or safety issue. Sometimes you are never going to - it makes the job harder when you know that people are going to take a negative position, but that just means your research and logic have to be that much better. You have to present your arguments more delicately and even the opposite of how you might normally go at it. It takes technique but there are ways you can do it. Budget cuts are a reality. There are many good ideas that are met with objections. How can you make the argument more compelling? Look at benefits that offset the costs. A case can be made for generating positive results.

**Slide: 23. Tip 3: Don't get trapped by templates**
Templates are useful but they can trap people into a structure or organization that doesn’t work for them. The template needs to be organized to fit your purpose.
Common template headings

<table>
<thead>
<tr>
<th>Common template headings</th>
</tr>
</thead>
<tbody>
<tr>
<td>issue/purpose</td>
</tr>
<tr>
<td>implications</td>
</tr>
<tr>
<td>background</td>
</tr>
<tr>
<td>next steps</td>
</tr>
<tr>
<td>current status</td>
</tr>
<tr>
<td>conclusion</td>
</tr>
<tr>
<td>key considerations</td>
</tr>
<tr>
<td>recommendation</td>
</tr>
<tr>
<td>Options</td>
</tr>
<tr>
<td>other</td>
</tr>
</tbody>
</table>

Not all headings will be necessary, depending on your issue, purpose and context. Susan has a page on her website some examples of writing briefing notes - see [http://web.uvic.ca/~sdoyle/E302/Notes/WritingBriefingNotes.html](http://web.uvic.ca/~sdoyle/E302/Notes/WritingBriefingNotes.html)

Poll: Template - Do you use a template for briefing notes? Yes - 62%; no 38%

**Slide 24: Outline your ideas before you write.**

- outline to as much detail as needed
- revise your outline, not your draft
- keep going until your outline is complete
- only then start writing actual sentences and paragraphs (or develop in point form)

The outline is the key to efficiency. It allows you to work on your organization before committing yourself to the content. Don’t start writing until you have covered everything that you are eventually going to put into sentences and paragraphs. A well-organized outline makes writing it almost pain-free. Often people will want to see your outline before you write the briefing note.

Susan displayed a sample BN and explained how it was organized.

**Slide 25: Tip 4. Collaborate before, during, and after you write.**

Collaborative writing is
- more efficient
- more effective
- more enjoyable

Depending on when you went to university you may not be familiar with this, but now we have students working together all the time. We know that when two people are working on a problem you have a lot more great ideas; can clarify ideas, and it turns writing into fun. You will get a lot further and a lot more done for your efforts if you involve other people.
Slide 26:

- Who should/could you talk to/write with?
- Who can offer advice?
- Who should/could be involved in the editing?

All of these are roles for collaborators. Often we just want someone to give us some advice on how best to present, or to review a draft and give feedback on which parts work and which ones don’t.

Slide 26: Tip 5. Write for readability

- keep the reader comfortable
- keep the reader moving forward
- use headings
- use bullet points and lists
- keep paragraphs and sentences short and clear

Let you reader grasp your message as easily as possible. Every next piece is related to what has already been said. The reader can undertake reading without great effort - if it is difficult to follow sometimes people just turn away.

Slide 27: Tip 6. Edit less for correctness and more for impact

Ask yourself
- Is the purpose clear?
- Have you approached things from your reader’s perspective?
- Have you approached things strategically?
- Is everything there that needs to be there?
- Do the beginning and the end match?
- Is the writing readable?
- Is the layout easy on the eye?
- Would you be confident walking into a meeting with your briefing note as the script?

Slide: 28: Tip 7. Use each briefing note as an opportunity to improve

Once you have finished a briefing note, ask yourself

- what worked?
- what didn’t work?
• what should I do differently next time?