

Effective Memo Writing: Reading and Ranking Assignment

Memos are brief professional documents, generally written to decision-makers—whether public, private, or nongovernmental. On the course website, the materials for this session include four brief items on memo writing, plus five sample policy memos (listed below). Some of the "how to" content of this material may be familiar to you from earlier coursework. If so, consider this assignment a quick refresher to ensure that we all begin with similar assumptions about what's expected. If you have done little or no professional memo-writing until now, please give this material close attention.

Read the material, and come to the workshop prepared to discuss the following:

1. Using the criteria outlined in the memos on memo-writing, rank the five sample memos in terms of their overall effectiveness and readability. Try to focus on style and organization of argument rather than substance. Which one is the most effective and which the least? Why?
2. Pick one of the less effective memos and outline some concrete improvements. *International students*: How do recommended or typical professional writing standards in your country or region differ from the expectations outlined here? Conversely, what's similar?
3. If your work or civic experience to date has required writing very different from what is recommended here, identify the circumstances: What was expected and why?

The reading material is in two sections:

A. "Memos on memos":

- Winston Churchill on brevity (World War II)
- Bob Behn on organization (headings and layout)
- Guidelines for effective informational memos
- Checklist for writing action memoranda (the most common form)
- Baldrige on writing style (effective, concise English)

B. Sample policy memos, U.S. government:

- Neustadt to President-elect John F. Kennedy on reorganization powers (1960);
- Lynn to Secretary Morton on Central Utah water project (1973);
- President Carter to the Director of NSF on tropical forests (1979);
- U.S. Courts Administrative Office to officers on AIDS (1987);
- Kleiman to White House Domestic Policy Council on the Federal Bureau of Investigation (FBI) taking over the Drug Enforcement Agency (1993)



Guidelines for Effective Informational Memos

Writing clear, informative memos is a critical to your career whether you are a policy maker, engineer, architect, consultant, or activist. Informative memos help lay the ground work for critical decisions that you and others will be making. Informative memos are not decision memos; they do not recommend a course of action. Instead, informative memos are directed to a decision maker and seek to:

- highlight options
- compare alternatives
- provide analysis

As such your ability to convey complex information simply is key. Also important is your forethought about the concerns of the decision maker and deciding how to address each concern.

Of course no writing is unbiased and while you will likely have an opinion about the best course of action, save these strong opinions for later. Instead, challenge yourself to carefully lay out each critical issue, idea or plan and analyze these using a carefully chosen structure (e.g., pros/cons, long term/short term). Think of an informational memo as a document that sets the stage, frames the issues, and provides the detailed analysis that feeds into the larger decision. When you what know your decision maker expects (audience) and you give her what she needs clearly and concisely (meeting expectations), you become part of the decision making team. Okay, so here's the strategy:

1. Include a Summary Paragraph:

Similar to an action memo, here you need to summarize the contents of the memo. However, your decision maker doesn't want an action plan. She will create that (or have you create it later). Instead:

- State the issue (1 sentence)
- Summarize the analysis briefly (1-3 sentences)
- Outline the options (1-3 sentences)

2. Focus on the content of the memo:

The body of the memo is where the analysis goes. Here you want to explicitly tell the decision maker that she will need to make a decision about the issues that you will present one by one. For each issue you need to:

- Name and explain briefly each issue – most important issue goes first
- Provide the analysis at a level expected by the reader (don't include raw data, if she wants to focus on trends)
- Discuss options
- Use a sub heading to divide issues

3. Craft the Conclusion

Informational memos have conclusions that state what the next steps are, but don't draw conclusions or recommend any specific action. It is not about providing a distinct answer to a question but providing a variety of well-analyzed options.



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4. Don't underestimate the power of tone in writing

Get in the habit of thinking about who you are writing to and where the memo might end up (the press, a higher up, etc.) Everything you write these days and send electronically (even e-mail) should be carefully crafted, edited and then scanned for problems. Informative memos have a distinctively neutral tone. They don't seek to sell an idea, although your choices about what to present and how will often persuade a decision maker. In general tone should be:

- Diplomatic
- Acknowledge problem areas
- Advance options without arguing with existing policies
- Tactful, not patronizing or insistent

Practicing more than one style of memo writing will help you fine tune and develop your individual style.

CHECKLIST FOR WRITING ACTION MEMORANDA

Structure

- Directly address your reader's needs in the opening lines.
- Cover background in just a few words and then go quickly into a summary of your recommendations.
- Break down your discussion into meaningful sections in a significant order, reflect that order very briefly in your opening paragraph, and then stick to it.
- Use subheads to summarize key points, like headlines, for easy skimming (in boldface or underlined).
- State the main idea of each paragraph within the first two sentences.
- The rest of the paragraph supports or qualifies the main idea with concrete data.
- Distill and group information into bullet points with appropriate headings.
- If using a conclusion, frame your recommendations in a broader context, rather than merely summarizing your main ideas.

Content

- Anticipate your reader's most pressing needs and focus on what you know and she or he doesn't.
- Specify your assumptions and justify them when necessary.
- Keep discussions of problems and their potential solutions close together and indicated as such.
- Find creative, meaningful ways to express key statistics.
- Evaluate your options by balancing out their costs and benefits.
- Briefly discuss alternatives or counterarguments whenever feasible.
- Balance recommendations with discussions of their evaluation and implementation

- Consider the political implications of your recommendations whenever relevant.
- Whenever possible provide your reader with fallback positions in case your preferred options are not attainable.
- Make sure issues of equal importance take up equivalent space: the more important, the more space, and vice versa.
- Consider closing with a discussion of "next steps"-- short- and long-term implementation.

Audience

- Give your reader a clear answer to his or her paramount concern: "Why am I reading this?"
- Recognize your intended reader's degree of prior knowledge: try not to over- or under-explain.
- Anticipate your reader's probable questions, concerns, and objections and answer them directly.
- Choose your words carefully: your memo may be forwarded to secondary readers.

Style

- Avoid such wordy introductions as "It is an important consideration to keep in mind that...." Instead, you just get right down to the point.
- Never use two words when one will do.
- Use the active voice whenever possible.
- Use parallelism in all types of lists.
- Choose the plain English word over its more inflated Latinate equivalent.
- Match vocabulary, word choice, and use of jargon to your reader's background and level of expertise.

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11.027City to City: Comparing, Researching and Writing about Cities: New Orleans
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