



## How to Write a Policy Memo

Policy Memos are a means of communicating policy options and analysis inside government and beyond. HKS students will write policy memos in the classrooms and in future jobs. This quick “how to” essay will help you understand the expectations of memo writing, in terms of style, format and analysis.

Following a three-step process, students will be able to craft excellent memos. Those steps are:

### **Step 1: THINK**

Before you write, think through the policy problem of your memo. Ask yourself: *What is wrong? Can I quantify the problem?*

For example, you may wish to write a memo about school overcrowding. But overcrowding is an “issue.” To find the policy “problem,” you will need to quantify and become more specific. Where is this a problem? Can you use data to demonstrate the problem?

Let’s say you’ve decided that the problem is that “elementary school classrooms in the district will be oversubscribed by 5 students per class next academic year, according to space and government constraints.” This problem statement is more specific than, “Our school district must deal with overcrowding.” A quantifiable problem statement will provide clarity, focus and urgency for the rest of your memo.

Once you’ve clarified the problem, you must consider your audience (for the overcrowding example, let’s say the audience is the superintendent of schools): *What does she know about this problem? Does she really want to solve it? Why hasn’t she already? What keeps her up at night? What are her constraints - politically, legally, etc.? What are her educational goals for the district? And ultimately - is this problem hers to solve?* These questions will help guide what goes into the memo; and what is cut.

To find solutions for your policy problem, consider all practical pathways your audience has to fix overcrowding in the near future, and the long-term. To do this, you can make a simple table – called a “framework for analysis” – to test out different policy options, and ways you would evaluate these options (criteria).

Here is an example:

Overcrowding:	Criteria 1: Politically feasible	Criteria 2: Operationally feasible	Criteria 3: Financially feasible
Option 1: Add desks for 5 more students	—	—	+
Option 2: More classroom aids in existing rooms (improve the teacher ratio)	+/- (unsure)	+	+/-
Option 3 More classrooms (i.e. build modular space and hire more teachers)	+/- (unsure)	+	— —
Option 4: Redistrict	— —	+	+

(For more information, see: *Bardach, Eugene; A Practical Guide for Policy Analysis; CQ Press; 4<sup>th</sup> Edition; 2012.*)

From this analysis grid, option 1 (add more desks) is both politically and operationally untenable and is therefore out (red). The best choice in terms of the criteria (political, operational and financial feasibility) is to add classroom aids so it becomes your near-term solution (green).

But maybe you know if overcrowding continues, the district will need to consider building or redistricting. You can advise your audience that in the short term you recommend classroom aids, but the long-term decision is about weighing the trade-offs between the financial cost of building, and the political cost of redistricting (yellow). How would you advise your audience, given these trade-offs?

### **Step 2: WRITE**

Now that you have a sense of your memo – the problem, your audience’s needs, your solution (in this case, short term and long term) -- you can prepare a first draft.

In terms of structure, it is advised to spend about half of your space illustrating the problem, and the other half explaining your analysis and recommendations.

In the first paragraph, it is customary to state the problem and solution, called your Bottom Line Upfront. Then, in the following paragraphs, you expand upon the problem – explaining either the causes of the problem, the consequences of the problem, or both. Your goal in the first half of your memo is to evoke a sense of urgency and motivation for your audience to solve your problem statement. Keeping your audience’s needs in mind will help you with this part.

In the second half of the memo, you can describe the policy options and solution. While it is helpful to demonstrate your work and thinking, it is not recommended that you insert the above table in lieu of good writing. Instead, use the highlighted boxes above to tell the story of your analysis: what criteria did you use to decide? Why is your recommendation the best pathway? Are there counterarguments to be considered?

Lastly, remember to have a conclusion statement to round out the memo.

### **Step 3: REVISE**

Once you have a draft, consider the ease of reading your memo. You can add bold and underline to ensure that the problem and solution are clear to your audience upfront.

Good memos are concise, as busy decision makers have little time for reading. To write concise memos, you will need to edit down your word count. One way to do this is revising sentences from passive to active voice.

For example: “Several school aids are not working anymore” can be revised to “Several school aids retired” (the sentence is now active and has less words). Another example: “The school district cannot absorb the additional cost of hiring new teachers” can be revised to “Hiring new teachers is too expensive for the school district” (again, a sentence that is active and short).

You can also ask a friend or colleague to read your memo for clarity and language. For clarity: have your friend to read only the first paragraph and ask him: *What is the problem of my memo?* If he can’t answer, you need to work on articulating the problem statement – is it quantifiable? Is it specific? For language: ask him to circle any sentences that are hard to read. Those are the sentence to revise further, cutting down the word count in longer, confusing sentences.

Breaking down the memo writing process, and saving room to revise, will help you become a stellar memo writer!

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