



EWU INSTITUTE FOR
PUBLIC POLICY &
ECONOMIC ANALYSIS

Policy Memo Writing



2019/2020



WHAT IS A POLICY MEMO

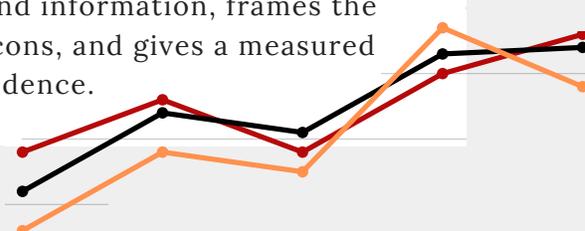
A policy memo is a document that answers a question regarding a policy problem, providing recommendations for a particular course of action. It is written for a specific decision-maker who will deliberate on the issue at hand.

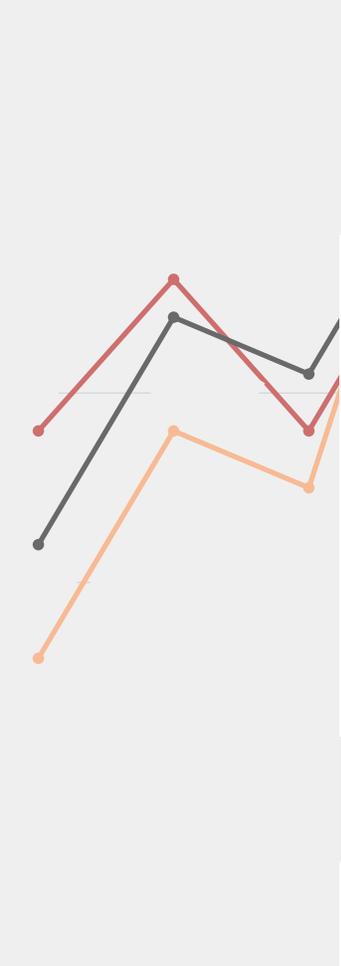
The best policy memos are clear, concise, persuasive, well-organized and evidence-based. It is imperative that they get straight to the point; decision-makers are busy, thus they will likely only read a portion of the policy memo.

What is a policy memo not? A policy memo is not the same as an academic research paper or a white paper, also known as a briefing. It does not include every detail or fact related to a particular topic. It is a persuasive document, not an expository one, and it has a specific audience.

For this instructional guide we reviewed over 20 resources from universities and public agencies, including University of Michigan, Harvard, Princeton, and USAID to compile the most relevant and incisive tips about the skill of policy memo writing.

What are the basics? A policy memo is a brief summary of key findings and recommendations. It focuses on answering a question about a particular policy problem. It needs to be short and concise, preferably 3-5 pages. It provides relevant background information, frames the options in terms of pros and cons, and gives a measured recommendation based on evidence.





THE WRITING AND RESEARCH PROCESS

A policy memo's benefit is its brevity; however, this should not reflect a lack of time, effort, and research put into the final product.

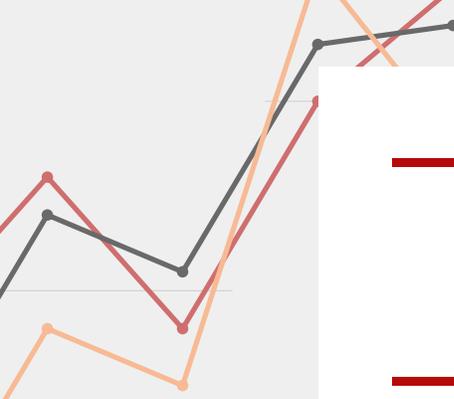
Begin by thinking through elements of the problem and what the options are. Ask yourself questions like what are the relevant facts and key sources? Who are the key stakeholders? What worked previously or in different locations? Try to collaborate, ask colleagues or experts, when you can.

Beginning the research process can be overwhelming, especially for people with access to academic databases. Remember to stick to a few key words, phrases, or sources. Always ensure your sources are reliable and don't become bogged down in trying to source common knowledge or basic facts.

Begin your outline. Order of the memo into basic sections and the overall argument structure. Then, organize the content of your arguments to ensure that each claim is sufficiently backed up with a logical link towards evidence.

When writing your memo, be as short and concise, deliberate, and specific as possible. Remember this is still a first draft--don't obsess over this stage.

Revision comes next. This is where you will challenge yourself to cut the word count in half and weed out all verbosity. Keep sentences short and uncomplicated. When you're finished revising, proofread.



FORMAT OF A POLICY MEMO

To: Dr. Patrick Jones, Executive Director, IPPEA
From: Jordan Stevenson, Project Assistant, IPPEA
Re: Policy Memo Educational Resources
Date: August 30th, 2019

Introduction

A typical policy memo will have clearly formatted sections, to include the introduction, background, analysis, and background. A tip for the introduction is to do this part last! This section is also called Executive Summary. A good introduction explains purpose of memo, summarizes conclusion and reasoning of entire memo in 3 sentences, and doesn't need to include all of the evidence, since that is present elsewhere in the memo. A good rule of thumb is that a decision-maker will likely only read the introduction, so this is the most important part of the entire memo.

Background

This section will present factual information such as general history (chronological, if possible), data or statistics, and basic parameters of the policy or problem. Make sure to get rid of anything that is irrelevant to the specific question at hand. The facts ought to be presented in a neutral fashion. Use a short in-text citation form including the source and year, where possible ex: (New York Times, 2021). You can provide a list of references at the end, as applicable.

Analysis

This is where argumentation and persuasion take center stage. Here, you will consider options and explain rejection of others using standardized criteria. Delve into one argument per paragraph. First sentence (aka topic sentence) should state the complete argument for each paragraph. The remaining sentence of the paragraph provides evidence for that argument. Remember to examine the problem, stakeholders, multiple stakeholders, and quantitative information about feasibility (political, environmental, technical, etc). Utilize topical headers that are meaningful in the context of the subject, instead of naming the body of the memo simply 'Analysis'. Provide a proposal or alternative. Make sure to present counterarguments fairly, and disprove or refute them. Discuss limitations such as time, budget, political considerations, or impacts in this section.

Conclusion

This will be the smallest section, where you will concisely present the recommended course of action once more. However, you shouldn't simply restate what you already wrote. Speculate on future impacts of the proposal and leave the decision-maker with a reason to act quickly.



DOS & DON'TS FOR POLICY MEMO SUCCESS

DO

- Clearly define the problem or issue at hand.
- Point out winners and losers.
- Use bullets or lists for simple concepts.
- Anticipate questions.
- Use active voice-avoid phrases such as “there are” or “it is.”
- Use tables, diagrams, or pictures to demonstrate your findings where applicable.
- Delete any extraneous information that doesn't relate to the main point.
- Ask someone to double-check your memo for you.
- Make a concrete recommendation for action.
- Use data, statistics, or peer-reviewed studies to substantiate your claim.
- Use an objective, conversational tone, avoiding emotional appeals.
- Avoid repetition.
- Use single-spaced or 1.5-spaced line formatting.
- Use formatting such as bolding, italics, or underlines to help segment your memo.
- Address the person the memo is directed towards and yourself using pronouns.
- Think about innovative ways to present information and solve the problem at hand.

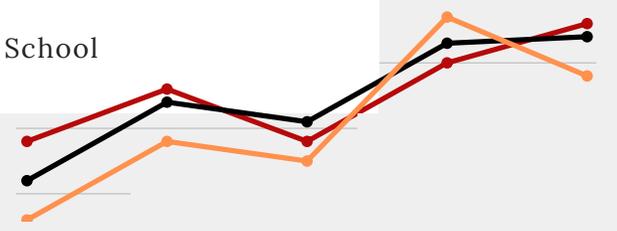
DON'T

- Explain every calculation step-by-step.
- Provide an unrealistic solution or one that falls outside the scope of the decision-maker's power/role.
- Use unnecessary jargon or uncommon acronyms (without defining them).
- Over-explain simple concepts or state the obvious.
- Choose an overly fancy or illegible font. Times New Roman or Arial is fine.
- Under-represent the counterargument to your claims.
- Double space your text.
- Be overly formal
- Be excessively wordy, arcane, or vague.
- Use euphemisms or cliches.
- Use logical fallacies to try to explain your claims.
- Bury the lead--state your main argument at the beginning of each paragraph.



REFERENCES

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- “How to Write a Policy Memo” A. Trevor Thrall, University of Michigan – Dearborn
- “Examples of Policy Writing” University of Michigan
- “Policy Memo Writing Overview” University of Michigan
- “Political Policy Writing” David Morse and Elena Delbanco, University of Michigan
- “Writing effective policy memos” Massachusetts Institute of Technology
- “How to Write a Policy Memo” David Schanzer, Duke University
- “Policy Memo” Thompson Writing Program, Duke University
- “Best Practices - Policy Memo” Educational Equity
- Writing Guide: Policy Memo, University of Southern California
- Policy Memo Writing Tips, Woodrow Wilson School Princeton
- “How to Write a Policy Memo” Harvard Kennedy School
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- “Policy Memos” Harvard Kennedy School



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