

# Policy Memo Writing

## Policy Memos

A policy memo is a concise, targeted document designed to provide analysis and recommendations to a specific audience regarding particular issue or problem. Typically used in governmental, non-governmental, and academic settings, policy memos serve as a crucial tool for decision-makers who need to understand complex issues quickly and make informed choices and recommendations.

You may be asked to write a policy memos for a class. These tend to be shorter and less elaborate than an actual policy memo that would be sent and used, but the purpose and structure is the same.

### What is the purpose of a policy memo?

The purpose of a policy memo is to inform and guide decision-making by presenting clear, concise, and well-organized information. Unlike lengthy reports, policy memos are designed to be brief and to the point, allowing busy officials and stakeholders to grasp the essential points without wading through excessive details.

Here are the key **purposes** of a policy memo:

**Provide Analysis:** Policy memos offer an in-depth analysis of a specific issue, considering various angles and perspectives. This analysis includes the current status, historical context, and relevant data that helps in understanding the issue comprehensively.

**Present Recommendations:** Based on the analysis, policy memos propose actionable recommendations. These recommendations are intended to address the issue effectively and are backed by evidence and logical reasoning.

**Facilitate Decision-Making:** By distilling complex information into an easily digestible format, policy memos help decision-makers quickly understand the issue and the proposed solutions, enabling them to make timely and informed decisions.

**Facilitate Communication:** Policy memos streamline communication between researchers, analysts, and decision-makers, ensuring that key information is accessible and actionable.

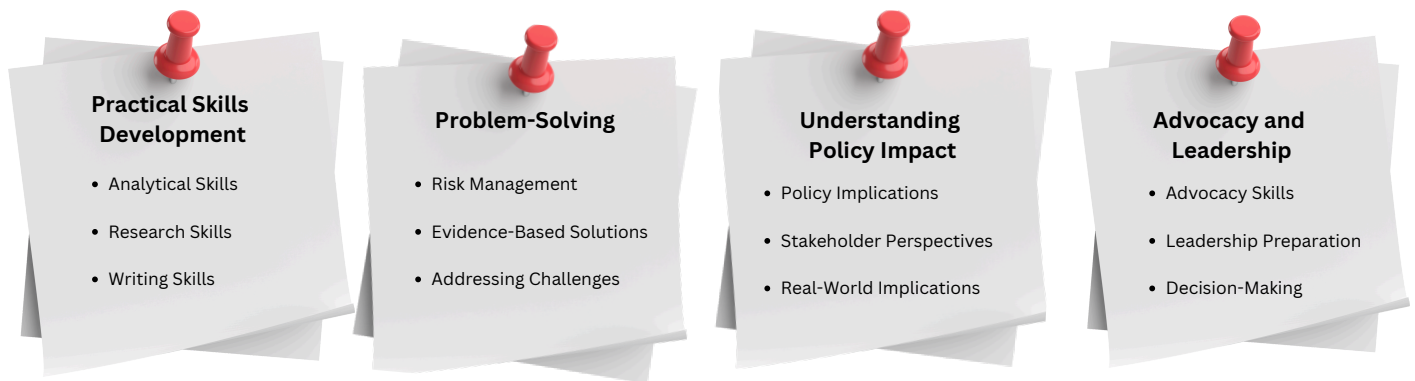
**Advocate for Change:** Advocacy groups use policy memos to argue for specific policy changes, presenting compelling evidence and arguments to support their positions.

**Strategic Planning:** Organizations use policy memos for internal strategic planning, helping align their policy goals with broader organizational objectives.

**Highlight Feasibility and Impacts:** Policy memos often use tools like [PEST](#) (Political, Economic, Social, and Technological) and [SWOT](#) (Stakeholder Analysis) charts to evaluate the feasibility of different recommendations. These analyses help in understanding the potential impacts on various stakeholders and broader environment.

## Why are you being assigned a policy memo?

Graduate students in education are often assigned to write policy memos for several important reasons, all of which aim to develop skills and prepare you for real-world challenges in the field of education policy and administration. Here are a few **key reasons** for a policy memo assignment:



## Policy Memo Use in Education

Policy memos are crucial tools in the education sector, serving to inform and influence decision-makers on a variety of issues. They provide concise, well-structured analysis and recommendations helping to shape effective educational policies and practices. Here are common uses in education:

**Policy Development:** Policy memos help in the creation of new educational policies by presenting evidence-based recommendations to policymakers.

**Program Evaluation:** They assess the effectiveness of existing educational programs and suggest improvements and recommendations.

**Resource Allocation:** Policy memos provide a rationale for the distribution of resources, ensuring they are used efficiently and equitably.

**Advocacy:** Stakeholders, such as educators and advocacy groups, use policy memos to highlight important issues and advocate for change.

**Crisis Management:** In response to emergencies (e.g. pandemics) policy memos offer strategies to

address immediate challenges.

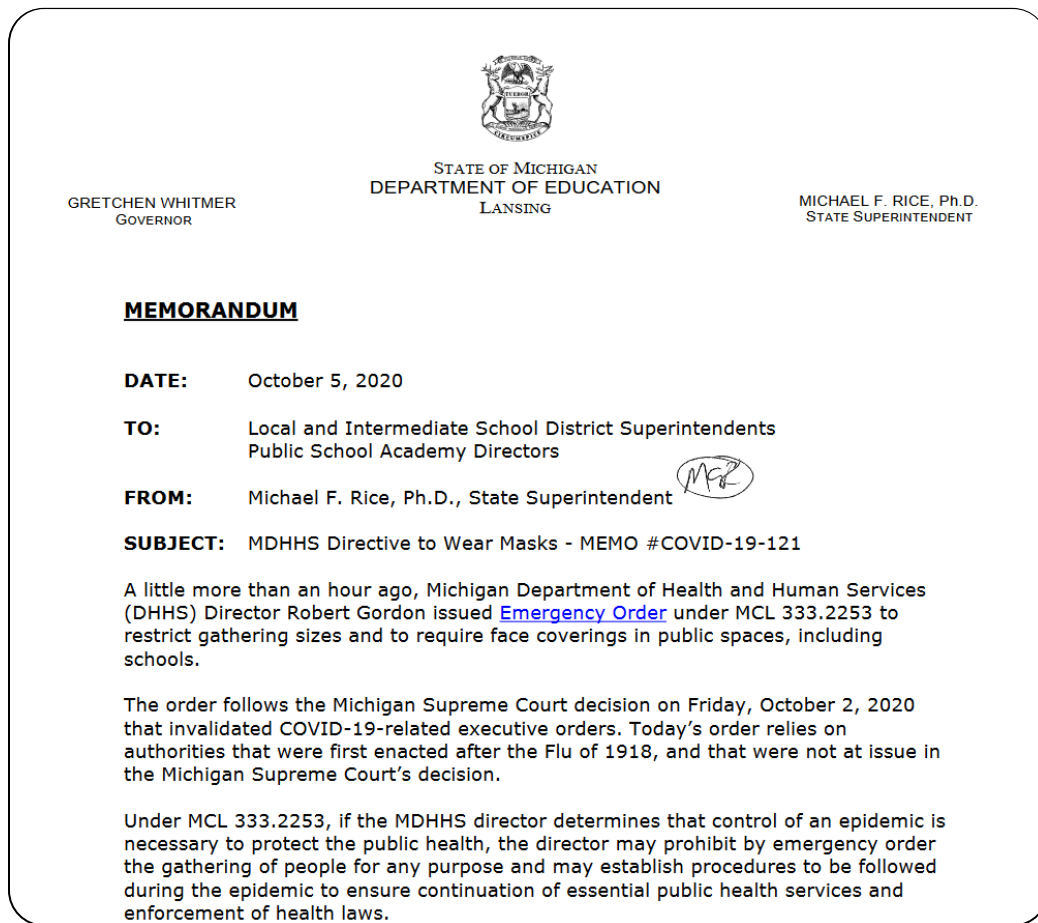


Image 1: Screenshot of a State of Michigan Department of Education Covid-19 Policy Memo

Policy memos are vital in shaping educational policies by providing clear, actionable insights and recommendations like the above memo addressing face coverings and gathering sizes during the Covid-19 pandemic. The superintendent used this memo to communicate a new emergency order.

## Examples of Use

### Example 1: Addressing Achievement Gaps

**Issue:** Persistent achievements gaps between students of different socioeconomic backgrounds.

**Policy Memo Objective:** To recommend strategies for reducing these gaps and promoting equity.

**Content:**

- **Problem Statement:** Despite various initiatives, significant achievement gaps remain.
- **Background:** Data highlighting disparities in test scores, graduation rates and college enrollment
- **Analysis:** Review of current policies and their limitations
- **Recommendations:** Targeted funding, early intervention programs, professional development
- **Implementation:** Steps for securing funding, timeliness for rolling out programs, and metrics for measuring success among students

## Example 2: Integrating Technology in Classrooms

**Issue:** The need to integrate technology into classrooms to enhance learning.

**Policy Memo Objective:** To propose a comprehensive plan for technology integration

**Content:**

- **Problem Statement:** Many schools lack the necessary technology and training to effectively integrate digital tools into teaching.
- **Background:** Evidence showing improved student outcomes with the use of technology
- **Analysis:** Comparison of different technology integration models and their outcomes.
- **Recommendations:** Infrastructure investment, teacher training, curriculum development.
- **Implementation:** Phased approach with pilot programs, evaluation periods, and scalability plans.

## Example 3: Enhancing Student Mental Health Services

**Issue:** Increasing mental health issues among students and insufficient school-based mental health services

**Policy Memo Objective:** To propose strategies for improving mental health support within schools.

**Content:**

- **Problem statement:** Rising rates of anxiety, depression, and other mental health issues among students are not being addressed by current school services
- **Background:** Statistics showing the prevalence of mental health issues among students and the impact on academic performance and well-being.
- **Analysis:** Evaluation of existing mental health programs, identification of gaps, and comparison with best practices in other regions or countries
- **Recommendations:** Expand school-based mental health staff, training for educators, comprehensive mental health curriculum, partnership with local health services, crisis intervention protocols
- **Implementation:** Phased hiring, training programs, evaluation metrics

# Elements of a Policy Memo

Understanding the genre of a policy memo and its core elements is crucial for crafting effective and impactful documents. There are conventions, expected structure, and key elements and features.

The **key elements** of a policy memo include:

## **Executive Summary**

A concise overview summarizing the main points of the memo, including the issue at hand, key recommendations, and the rationale behind them. Typically one paragraph long (although this varies), it provides enough information for a busy reader to grasp the memo's essence quickly and easily. It is often written once you have completed writing the policy memo for accuracy.

## **Introduction**

The introduction provides necessary background and context for the policy issue. It sets the stage by explaining why the issue is important and warrants attention, often including a brief overview of the relevant history or previous policy efforts. It is important to understand your audience and readership so that you provide adequate and concise background and context.

## **Problem Statement**

The problem statement clearly defines the problem or issue being addressed. This section details the scope, significance, and impact of the problem, supported by evidence and data to illustrate why it is a pressing issue that needs a solution. Understanding the problem is crucial before attempting to concisely and effectively articulate it to others. Seek feedback.

## **Policy Options**

This section includes an analysis of various policy alternatives available to address the problem. Each option is evaluated in terms of feasibility, benefits, drawbacks, costs, and potential impacts. This section helps decision-makers understand the pros and cons of the different approaches. For a class, you may not have all of this information to evaluate.

## **Recommendations**

This section presents the preferred policy option(s) and the specific actions recommended. This section should clearly articulate why the recommended approach is the best solution, supported by the analysis section. Recommendations should be practical and actionable.

## **Implementation Plan**

This section outlines how the recommended policy can be put into action. This may include steps for implementation, timeliness, required resources, and identification of key stakeholders involved. It provides a roadmap for moving from recommendation to execution. Creating visuals to help with your own understanding of the implementation plan can be valuable.

## **Conclusion**

Summarizes the main points, reinforcing the importance of the recommendation actions and the expected benefits. It often includes a call to action, urging the recipient to take specific steps. The idea is not to repeat what has been said, but to reinforce and make any call to action clear, compelling, and actionable.

## **References**

List the sources cited in the memo, including data, reports, studies, and other references. This ensures transparency and allows readers to verify the information and analysis presented.

## **Appendices (if necessary)**

Additional detailed information such as data tables, charts, or extended analysis that support the main content but are too detailed to include in the main sections. Appendices provide supplementary material without cluttering the main narrative of the memo.

## Visualizing memo sections

Each section of a policy memo will vary in terms of *how* much you write. Here is a visual to help:

Main Point/Takeaway

Background

Evidence

Conclusions/Implementaion

As you can see, most of your memo will be devoted to communicating evidence clearly, concisely and in a way that is compelling. The conclusion and Implementation section(s) of your memo is the next largest section; it is crucial that you clearly walk readers through the implementation phase.

Visual aids can also be helpful for readers. The implementation section, for instance, could be visualized so that readers can quickly understand *how* the solution would be implemented and when. Visuals or bullet points can also be useful in the evidence section. *How* you decide to present information will depend largely on your audience, the situation, and your purposes for writing.

## Policy Memo Writing: Key Steps

Writing a policy memo involves a series of **structured and iterative steps** designed to ensure clarity, precision, and impact. This section covers the essential stages of crafting an effective policy memo.

### Identify and Define the Issue

- Conduct preliminary research to understand the scope and context of the issue
- Clearly articulate the problem or issue that the policy memo will address

## Conduct Thorough Research

- Collect relevant data, statistics, and evidence from credible sources
- Examine existing research, reports, and policy documents related to the issue
- Identify and understand the perspectives and interests of key stakeholders

## Analyze Policy Options

- Identify and list potential policy options or solutions to address the issue
- Assess the benefits, drawbacks, and feasibility of each option (visuals can really help)
- Consider impact by analyzing the short-term and long-term impacts of each policy option on stakeholders and the broader context

## Develop Clear and Actionable Recommendations

- Select the most effective and feasible policy option(s) based on the analysis
- Detail recommendations and clearly articulate how they address the issue
- Develop and provide a rationale for why the recommended option(s) are the best

## Determine and Respond to Your Audience

- Identify who your audience is and understand their needs and expectations (e.g. limited time)
- Conduct a needs analysis of your audience to better understand how to approach memo writing
- Adjust your language and level of detail based on your audience's technical expertise
- Define technical terms and provide necessary background for a lay audience
- Avoid redundant or unnecessary information for an expert or more knowledgeable audience

## Organize Your Memo Effectively

- **Introduction** that summarizes the documents conclusions and recommendations and briefly states the problem or situation with a quick overview of your analysis.
- **Background** that provides a concise summary of any historical or technical information needed to understand the arguments. Adjust the amount of background based on audience familiarity.
- **Supporting arguments or analysis** that presents logical arguments and analysis to support your conclusions and recommendations using data, evidence, and reasoning to build your case.

## Use an Effective Writing Style

- Choose simple words to express your ideas clearly
- Avoid jargon, or define technical terms clearly if they must be used
- Write in active voice and make your sentences direct
- Develop one idea or argument per paragraph and make it explicit within the first 1-2 sentences.
- Consider audience and level of formality and familiarity when approaching the tone of the memo

## Format Memo Properly

- Use standard paper size (8.5 X 11" or A4) with one-inch margins on all sides
- Single-spaced paragraphs and separate them with a double space
- Use standard conventions for layout, including numbering, bullets, identification
- Address the memo to your audience at the top of the page (the header)

## Adhere to Length Guidelines

- Follow the limit specified in your assignment (if not an assignment consider audience, situation)
- Keep your memo concise to ensure it is read and valued by busy decision-makers
- Use the length limit to encourage careful editing and prioritization of information

## Get Feedback

- Exchange memos with peers (or mentors) for proofreading and editing before submission
- Use peer feedback to enhance clarity and content

## Additional Resources:

- [Annotated Policy Memo, MIT Comm Lab](#)
- [Annotated Policy Memo, MIT Comm Lab](#)

# Policy Memo Writing Tips

Effective policy memo writing requires clarity, precision, and a structured approach. The tips that follow focus on writing, language, and sentence structure to help you craft compelling easy-to-read memos. By following these tips, you can enhance your ability to communicate recommendations.

## Prioritize Important Information

Present the most critical information first. Structure your memo in a way that allows the reader to grasp the main points quickly. This is especially important for busy readers and decision-makers.

- Example: Start with an executive summary that highlights the key recommendations.

## Be Specific and Concrete

Avoid vague statements. Provide specific details and examples to support your points.

- Example: Instead of “There are many benefits to this approach” write “The approach increases test scores by 15% and reduces dropout rates by 10%.”

## Use Short Paragraphs and Sentences

Break up long blocks of text to improve readability for busy readers. Each paragraph should focus on a single idea. When revising work aim to shorten paragraphs if they are not focused on a single idea.

- Example: Aim for paragraphs of 3-5 sentences and keep sentences under 20 words when possible.

## Be Clear and Concise

Use straightforward language and avoid jargon. Aim for clarity in every sentence to ensure your memo is easily understood by a wide audience and specific readers.

- Example: Instead of “The implementation of this initiative would result in substantial benefits” write “This initiative will provide significant benefits.”

## Use Active Voice

Active voice makes your writing more direct. Be direct in your writing by using an active voice.

- Example: Instead of “The policy was developed by the committee” write “The committee developed the policy.”

## Justify Recommendations

Clearly explain why your recommendations are the best course of action. Support your arguments with evidence and logical reasoning.

- Example: “Expanding mental health services will address the increasing rates of anxiety, depression, as evidenced by recent studies (cite your sources) showing a 25% rise in student mental health issues”

Effective policy memo writing requires a deep understanding of audience, a tailored and structured approach that aligns with genre conventions, reader-friendly formats and design, conciseness, quantifiable evidence (if possible), and techniques like bullet points and headers to enhance usability.

## More about being straightforward

Being straightforward may not be straightforward for everyone. Here are a few examples:

### Complex

“In light of the recent findings, it is imperative that we commence the implementation of a new student engagement programs.”

### Straightforward

“We need to start a new student engagement program because of recent findings.”

### Complex

“The overarching objective of this initiative is to foster an environment that is conducive to learning for all students.”

### Straightforward

“This initiative aims to create a good learning environment for all students.”

### Complex

“In order to enhance educational outcomes, it is recommended that we allocate additional resources to support teacher training.”

### Straightforward

“To improve education, we should spend more on teacher training.”

When revising be sure to read closely for overly complex sentences that could be simplified.

# Policy Memo Dos and Don'ts

DO	DON'T
<p><b>Tailor your memo</b> to the knowledge level and interests of your audience. Use appropriate language and provide necessary background</p>	<p><b>Use jargon</b> and complex technical terminology without clear explanation or definition. Ensure your memo is accessible to readers without specialized knowledge and for specific readers.</p>
<p><b>Start with the Bottom-Line Up Front (BLUF).</b> Begin with a clear statement of the main message and recommendations to help decision-makers grasp the essential points.</p>	<p><b>Forget to state the purpose clearly.</b> Make sure the purpose of the memo and the desired outcomes are clear from the outset. Avoid ambiguity about what you are recommending.</p>
<p><b>Keep sentences short</b> and to the point. Aim for clarity and brevity by keeping sentences and paragraphs concise. Avoid unnecessary details, run-on or overly complex sentences.</p>	<p><b>Make the memo too long.</b> Adhere to the specified length limit (e.g. assignment). Keep your memo concise to respect the reader's time and focus on essential information.</p>
<p><b>Structure your memo logically</b> and organize your memo with clear headings and a logical flow. Ensure each section seamlessly leads to the next. Understand the genre conventions.</p>	<p><b>Ignore the structure.</b> Avoid a disorganized format. Make sure your memo meets genre conventions and is well-structured with clear headings and logical progression of ideas.</p>
<p><b>Support your recommendations</b> with evidence. Use data, research findings, and concrete examples to back up your arguments. Ensure your evidence is relevant and credible.</p>	<p><b>Overwhelm with data.</b> While evidence is crucial, avoid overwhelming the reader with excessive data. Select the most compelling and relevant information to support claims.</p>
<p><b>Highlight key findings</b> and implications. Clearly emphasize the most important findings and their implications for policy. Make sure these points are easy to identify (e.g. bullet points).</p>	<p><b>Introduce irrelevant information.</b> Stay focused on the problem and your recommendations. Avoid including extraneous details that do not support your main argument or claims.</p>
<p><b>Proofread and edit thoroughly.</b> Review your memo for grammatical errors, typos, and clarity. A polished document reflects professionalism and attention to detail.</p>	<p><b>Skip the final review.</b> Don't submit your memo without thorough proofreading. Check for clarity, coherence, and correctness to ensure your memo is polished and professional.</p>

# Revision Checklist

## Content and Structure

- Is the purpose of the memo clearly stated in the introduction?
- Does the memo address the specific policy issue or question?
- Is the memo tailored to the needs and knowledge level of the intended audience?
- Are technical terms and jargon explained and minimized?
- Is the memo logically structured with clear headings and subheadings?
- Does the memo follow a coherent flow from introduction to conclusions?
- Is the problem statement or issue clearly defined and contextualized?
- Are the causes and consequences of the problem adequately explained?
- Is the evidence presented relevant, credible, and sufficient to support the arguments?
- Is the analysis logical and well-reasoned?
- Are the recommendations clear, actionable, and feasible?
- Do the recommendations directly address the problem stated?
- Are the benefits and potential drawbacks of the recommendation discussed?

## Clarity and Style

- Is the writing concise and to the point?
- Are there any redundant or unnecessary words, sentences, or paragraphs?
- Are the sentences clear and easy to understand?
- Are complex ideas broken down into simpler, digestible parts?
- Is the tone appropriate for the audience and purpose?
- Does the memo maintain a formal, professional tone throughout?
- Is the writing predominantly in the active voice (e.g. They passed the law vs. the law was passed)?
- Are the passive sentence constructions used sparingly and appropriately?

## Grammar and Mechanics

- Are there any grammatical errors (e.g. subject-verb agreement, verb tense)?
- Are sentences varied in structure and length for readability?
- Is punctuation used correctly and effectively?
- Are commas, periods, and other punctuation marks placed appropriately?
- Are there any spelling mistakes or typographical errors?
- Has the memo been run through a spell-check tool?

## Formatting

- Are the headings and subheadings used effectively to organize content?
- Are headings clear and descriptive?
- Is the formatting (e.g. font size, style, spacing) consistent throughout the memo?
- Are bullet points, numbered lists, and other formatting tools used effectively?
- Are charts, graphs, and tables clear, relevant, and correctly labeled?
- Do visuals enhance the understanding of the content (if applicable)?

## Final Review

- Has the memo been reviewed by peers or advisors for feedback?

- Have the suggestions and feedback been appropriately incorporated?
- Has the memo been read aloud to check for flow and readability?
- Are there any awkward or unclear sections that need revising?
- Has the memo been proofread multiple times?

# Additional Resources

[Michigan Department of Education Covid-19 Guidance Memos](#)

[Harvard Kennedy School Policy Memo Writing](#)

[Boston University School of Public Health Policy Memos](#)

[New York Department of Education Policy Memos](#)

[Purdue Owl Memo Writing Guide](#)

[How to Write a Policy Memo that Matters, University of Chicago Harris School of Public Policy](#)

[Deductive vs Inductive Writing, Purdue Global](#)

[Policy Memos, National Education Policy Center](#)

[Policy Memo : Broad Institute of MIT and Harvard](#)