MEMO WRITING

This note introduces memo writing to students training for careers in public service. It focuses on memos rather than research papers or essays, because memos pervade the daily life of any public servant.

A memo is a relatively short, written document. Memos address specific people or groups for the purpose of recording an agreement, transmitting information, making a case, or enabling action. Brevity is essential; most decision makers have little time and must assimilate memo contents quickly. Long memos don’t get read.

Think of a memo as a precision tool. Tools may be beautiful things in themselves, but we measure their value by how well they perform a task. In practical terms, every aspect of a memo – its prose style, organization, appearance on the page and content – should have a direct relationship to its purpose. Long flowery introductions, technical jargon, casual chit-chat, and showy vocabulary all distract from a memo's essential purpose: to inform or to enable action.

This note deals with four topics: identifying your audience or principal; getting yourself engaged in writing; using language; and organizing the final product. Added to these are notes on e-mail communications.

Know Your Audience or Principal

Specific people read memos. The more vaguely defined the target audience, the more difficult for the writer to decide what to say. Knowing your audience is of primary importance in memo writing. Ask yourself three questions about your audience: who are they, what do they need to know, and how should you present it to them?

- **Who is the audience of your memo?** Memos are directed at decision makers. Usually you write a memo for an individual or group to help them make a decision. To influence decision makers, you must give considerable thought to who they are. You have a duty to provide them with timely, accurate, and comprehensive analysis.
• **What do they need to know?** To meet the obligations of memo writing, you should ask: what type of information do they need to make a good decision?

  - Start writing your memo by considering the position of your readers and their responsibilities, constraints, and pressures. You should keep in mind how much knowledge they already have and tailor your information to their level of expertise.

  - Decide how much and what type of information they need to make a good decision. Keep four things in mind when considering this:

    1. Your audience relies on you for accurate and relevant information. This reliance places strong obligations upon you to choose information well and present decision makers with all sides of the issues. Unless you are designated as an advocate or identify yourself as such, you must strive for an unbiased presentation of the information. Individuals are often tempted to push their own agendas without regard to the requirements of a good decision by the principal. This is legitimate when so acknowledged in the memo. All memos however, should do justice to complex issues and to your principals. They are making the decision, not you.

    2. Provide the bad news as well as the good. You should alert your principals to the dangers, problems, and implications of decisions, as well as to the advantages. Although memos drive people toward decisions, you may have the unhappy but vital duty of telling readers they need more information to make a good decision. Often memos can only be summaries of arguments and reports, like the tip of an iceberg. The author should have supporting arguments and information to provide to the principals when needed or requested.

    3. Before making a recommendation, make sure you have laid out honest and realistic alternatives. Don't fall into what Henry Kissinger called the "war, surrender, my way" memo. It violates your responsibility to your principal, and a thoughtful reader will dismiss your analysis.

    4. In recommending a course of action, clearly lay out the reasons. Anticipate questions, address them honestly, and compare your recommendation to other options. It is your job to anticipate needs and support the decision maker.

• **How should you present the information to them?** Present all information with economy and clarity. Effectively writing a memo is a task that requires a special emphasis on clear formatting and accessible writing. Serve the reader’s need to access information quickly with judicious use of headings and bullets.
How to Get Engaged in Serious Writing

Writing is difficult, frustrating work. As a craft, it entails a set of specific, learnable skills, and results in a tangible product. The harder you work, and the more determined you are to master the skills, the better you will become. Like any craft, writing requires practice. When you sit down to write your memo, two steps will help engage you in writing: developing a system for writing, and getting help when necessary.

- Because writing is difficult, you need **an explicit system** for getting started and finished. Most memo writing is done under pressure. Under these conditions people can get stalled, confused, and side-tracked by psychological stress. Having a deliberate system gives you the self-discipline to plunge ahead in the face of this stress. In the absence of a system, you will find that you spend large amounts of time trying to figure out what you're doing. It doesn't matter particularly what system you use, so long as you have one and use it. Some people start with an outline and produce progressively finer drafts until they have a finished product. Some people “dump” everything they know about a given subject and then start culling and sorting, until they produce a coherent piece. Others begin with a few simple statements or assertions and then frame an argument around them. Experiment with a variety of methods, until you find one that suits your temperament.

- If you are having genuine difficulty and find that you don’t know what to do, **get help**. Writing workshops are plentiful. Get together with a group of students for the express purpose of talking about writing problems. Get suggestions from your professors. Don't retreat from the problem. You will need to write well in every job you have.

Using the Language

Remember that your written work presents you to others. Your use of language will shape their assessment of you. Sloppy phrasing, bad grammar, and incorrect spelling, for example, demonstrate unreflective thought. Respecting yourself, your ideas, and your principal should motivate you to master this essential means of communication. Your writing should strive for five important qualities: simplicity, straightforward sentence structure, clarity, clear action and responsibility, and correctness.

**Simplicity** is the mark of good writing. Complex sentence structure and organization is a sure sign of confusion or hidden agendas. A well-written memo will be so simple and straightforward in language and structure that it will leap off the page. Don’t, however, make the mistake of equating simplicity with ease of production. The harder you work, the simpler the prose gets: the more you shirk, the muddier it will be. Consider the following example:
Whether it is true or not, and there are strong indications that it is not, the allegation by the County of substandard performance against the contractor is premature and certainly serves no useful purpose.

This author tried to write in a “conversational” tone. Conversational language tends to be more complicated, elliptical, and indeterminate than good written prose. Written prose has to be edited to be good. Novice writers often respond to tough editing by complaining, “You’ve taken all the creative words out of my writing. Now it looks like something anybody could have written.” In fact, tough editing does exactly the opposite. It makes your writing very distinctive. Remember, the message carries the mark of your individual creativity.

**Straightforward sentence structure** is essential to clear communication. First, get the basic elements of the sentence straight: subject, verb, and object. Who is the actor? What action is the actor performing? On what or whom is the actor acting? What is the writer's purpose in describing the relationship between actor and action?

The county has accused the contractor of poor performance. This accusation is premature and possibly untrue.

County, accuse, contractor – these are the elements. By stressing them, we cut the number of words roughly in half, from 37 to 16. We specified the nature of the action (accuse); we exchanged bureaucratic fuzz-words (allegation, substandard) for simple ones (accuse, poor); and we allowed the writer to express some uncertainty about the conclusions (possibly). The reader now captures the spirit of the writer’s message much more readily. These are the simplest writing techniques. Strip sentences to their elements, and make those elements drive your sentences. Subject first, then verb, then object. Apply the techniques to this example:

With respect to problems of interim financing, and in consideration of the fact that short-term interest rates are prohibitive, the decision was made by the Finance Committee that the project should not be pursued beyond stage three of the design process until appropriate long-term financing can be secured through established capital market sources.¹

**Clarity** in word choice marks good writing. Clarity means three things: (a) choosing the right word; (b) preferring simple words or combinations over complex ones; and (c) avoiding unnecessary technical jargon.

- **Choosing the right word** is more difficult than it appears. When you begin writing something, certain stock phrases and terms roll out of your head onto the paper. These phrases and terms are cues to what you want to say, but often they

¹The Finance Committee considered interest rates for short-term loans too high. It therefore decided not to pursue the design process beyond stage three until lenders agree to long-term financing. (31 words v. 55)
do not convey what you actually mean. To communicate clearly, sort through alternative ways of saying what you mean. Get something on paper. Then, use your vocabulary, the dictionary, or a thesaurus, and deliberately substitute simpler words for complicated and ambiguous ones. Give special attention to verbs, and use the active voice.

- **Complex phrases** that have mushy meanings often litter memos, because writers get caught in a cycle of “bureaucratese.” Take the following example:

  Current fiscal management techniques and control practices are keyed to the fiscal-year budgeting processes of the government cycle. They result in inefficient resource utilization because administrators increase expenditures toward the end of annual budget cycles in order to assure zero-balance results and reporting, rather than maximum efficiency in resource utilization.

This example features many quasi-technical terms: “fiscal management techniques,” “resource utilization,” and “budget cycles.” These are common in bureaucracy but don’t communicate much. In a more active, direct form the example reads:

  Administrators tend to spend more at the end of the fiscal year, because they will lose the money they don’t spend. Typically, they are not allowed to carry money forward into the following year. This results in expenditures that often are not the best use of public money.

We’ve left “fiscal year” in, because it is a technical term that has important meaning. Beyond that, we stripped out all the quasi-technical terms and replaced them with simpler words.

Certain complex and mushy words creep into the language of public servants and become standard usage. Because bureaucrats use these words routinely, the public begins to think that bureaucrats are evasive. They are probably not – just insufficiently critical of their own language. Here is a list of some common bureaucratic words and their standard English equivalents.

<table>
<thead>
<tr>
<th>Bureaucratic</th>
<th>English</th>
</tr>
</thead>
<tbody>
<tr>
<td>facilitate</td>
<td>help/assist</td>
</tr>
<tr>
<td>prioritize</td>
<td>rank</td>
</tr>
<tr>
<td>indicate</td>
<td>say/show</td>
</tr>
<tr>
<td>impact</td>
<td>affect/effect</td>
</tr>
<tr>
<td>concept</td>
<td>idea</td>
</tr>
</tbody>
</table>
Another recent trend has been turning nouns into verbs. The trend started in computer circles where people “interface” with each other and “multiport” data. Today public officials “outsource” functions and “task” people to perform jobs. Such jargon separates public officials from citizens and creates a mystifying and unnecessary code to hide bureaucrats from accountability.

A similar common practice is turning nouns and verbs into adjectives and running them together as strange compound words. These words often sound very important, but mean almost nothing. The following words come directly from the papers of students trying to sound like bureaucrats:

<table>
<thead>
<tr>
<th>Nouns into Adjectives</th>
<th>Verbs into Adjectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>program initiation</td>
<td>diagnostic review</td>
</tr>
<tr>
<td>programmatic decision making</td>
<td>circumvention practice</td>
</tr>
<tr>
<td>definitional terms</td>
<td>allocation routine</td>
</tr>
<tr>
<td>problem areas</td>
<td>elimination criteria</td>
</tr>
<tr>
<td>personnel involvement</td>
<td>decisional alternative</td>
</tr>
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For each of these compounds, someone took a noun (program, definition, problem, etc.) or a verb (diagnose, circumvent, decide) and stuck it in front of a noun, giving it the function of an adjective. You can make adverbs the same way: programmatically initiated, diagnostically reviewed, etc. This clumping however, creates unwieldy, often unintelligible, prose and leaves little regard for a word’s root meaning or function.

The skill required to avoid this kind of clumping is simple. First, learn the difference between nouns, verbs, adjectives, and adverbs. Second, don't use compounds when a simple construction will suffice. Look at a number of alternative ways of saying something, and choose the simplest way, rather than jamming words together because they sound authoritative and bureaucratic. Principals need lucidity, not jargon.

- **Technical jargon** becomes a barrier to clear communication. When someone writes, “The purpose of our new thrust is to facilitate a more credible interface between clients and service deliverers and to indicate to top management how they ought to prioritize agency functions according to standard management concepts,” you know he is not writing for real human beings. Fellow citizens will have a difficult time trying to decipher the jargon. Automatically translate the words into English. If it doesn't make sense in English, then you have an important piece of information – the person doesn’t know what he is saying. If it does make sense, then there is a better way to say it.

As trustees of the common good, public officials have a special obligation to write in language that acknowledges and includes all members of the community.
A civic language should include the entire population. This requires that we avoid language that limits the citizenry to certain groups and implicitly excludes the rest of the population. In a more positive way, it obligates us to search for language that respects and acknowledges all individuals.

Inclusive language, however, does not mean we must resort to awful English. Only muddled good intentions create these bureaucratic monstrosities: s/he, or his/her. In this case, inclusive language involves using plural pronouns, using both pronouns connected by "or" (he or she) or alternating the pronouns by section or example. The English language is evolving in the attempt to develop a more inclusive public vocabulary. Public officials should take the lead in this effort without reducing the language to trendy or bureaucratic neologisms.

Clearly assigning action and responsibility will characterize skilled writing. Bureaucrats notoriously use language to obscure responsibility. They often think they are being clever by saying things in a way that hides who is supposed to be doing what. The typical means of obscuring responsibility are the passive voice and the editorial “we.”

- The classic device to hide responsibility is the passive voice, where the subject is driven (by the agent). Passive construction diffuses your analysis and back into major points. Remember that the strength of the English language resides in verbs. Use strong, active verbs. A good editor tries to eliminate as many copulatives (there... is, are, was, were) and weak verbs as possible. Verbs carry action and significance. Good verbs in the active voice eliminate the need for mindless space fillers such as “in order to,” “with respect to,” or “in consideration of.”

The distinction between active and passive is something every public servant should understand. In active construction, the subject clearly acts on a specific person or thing. For example: boy takes apple. In passive construction, action is taken on the subject (by an agent who may be left unidentified) – apple is taken (by the boy).

Consider the following examples from student memos:

We recommend that specific operational details of the tools addressed in this report and any others to be used in implementation of amended policies be clearly stated. (Very cagey. The “we recommend” makes it sound quite active, but the construction obscures the responsibility for specifying details. Who specifies?)

If it is decided that some therapeutic programs within existing institutions are required, the personnel needed to run those programs must be fully informed as to the nature of the programs and their
roles in them. (This is a triumph in passive construction. Not only does it fail to say who decides; it also fails to say who informs.)

Once you understand the difference between active and passive voice, you understand exactly what questions to ask about ambiguities in responsibility and action. Don't use passive construction to conceal action or responsibility, even when you suspect that other people don't understand the difference. Someone usually knows.

Another bureaucratic device for concealing responsibility is the editorial “we”:

We have always argued that rapid transit is the best long-run solution to urban transportation problems, given finite energy resources. In the short run, though, we are faced with the immediate problem of how to accommodate the city to the automobile.

Notice how the writer uses the first (editorial) “we” to communicate what she thinks and then uses the second (generic, or perhaps civic) “we” to implicate you in a point of view. You are supposed to miss the distinction and find yourself seduced into agreement. If you understand the editorial “we,” however, you'll ask yourself immediately who “we” is. Once you ask that question, the whole charade collapses. The credibility of the memo and its author collapses as well.

To clearly assign action and responsibility, specify who is supposed to be doing what; then structure the sentence to reflect that. Who or what (subject) does what (verb) to whom or what (object)?

**Correctness in grammar, spelling, and punctuation** requires that you proofread your work carefully. Remember not to rely solely on spell check, either. Many words can be spelled in more than one way, preventing the spellcheck software from finding the error. Examples are “principle” and “principal”, or “complement” and “compliment.” Each of these is spelled correctly, and therefore spell check will not alert you if you have used the incorrect one. For example, if you write the following sentence, spell check would consider it to be correct:

“The principle of the school gave Julie a complement about her new dress.”

This sentence utilizes the incorrect form of the words, but spell check did not alert us as we wrote them. Therefore it is necessary to proof your work thoroughly and not rely solely on the spelling and grammar check of your software.
Organization and Argument

A good memo – indeed, any good piece of writing – has a clear structure. It progresses as a set of well-defined, logically connected statements that lead to a clear conclusion. This is the “argument.” If you don't have an argument, you don't have a memo. In addition, a good memo has a clear format that calls the reader's attention to important steps in the argument. After the first reading, the reader should be able to return to key points without re-reading the whole document. In other words:

Tell me what you're going to say (topic sentence or paragraph); say it (body of memo); then tell me what you said (conclusion).

The three principal skills of organization and argument are: (1) putting the important things up front, (2) making the transition from one step of the argument to another clearly, and (3) using a clear format in your presentation.

- **Putting the important things up front** is a common technique in journalism. It's called the “inverted pyramid” style of writing. Write the first paragraph, or “lead,” as though your story could be chopped off at any point after it. This puts a premium on specifying the problem, setting up the decision that follows from it, and presenting the important evidence quickly and succinctly. It also means that a reader can look at your memo and immediately know what you're doing.

- **Making the transition from one step of the argument to the next clearly** means that you never pass from one subject to another without clearly identifying the new subject. “Blocking” is a term commonly applied to this practice. Tightly worded conclusions and clear headings alert the reader that you are changing subjects and moving to the next phase of your argument. Each major subdivision should have a new topic heading to help the principal know where you are going and find the points fast, if needed.

- **Using a clear format is essential to writing a solid memo.** Again, this requires skills in simplification. Your useful guides are: **define, order, connect, and conclude.**

  - **Definition** of your word choice needn't be cumbersome. If there is any doubt about the meaning of the words you are using, just say “x means y.” This practice will save you a lot of grief and misunderstanding. Don't try to fuzz over the weaknesses in your argument by using vague terms. Someone will figure it out.

  - **Ordering** is simply finding the logical relationship of the topics you want to discuss and devising a clear set of headings. The skill resembles writing headlines for the newspaper, only with fewer words.
- **Connecting and concluding** give your reader clear messages about what you've said. The major message of this article, for example, is *clarity* – about the process of writing, the use of language, the assignment of responsibility, and the structure of the argument and format. How's that for a summary?

**Conclusion**

Remember your obligations to yourself, your principal, and the information you are presenting. A memo communicates. Good communication strives for accuracy, clarity, and honesty. It means taking your audience seriously and letting their needs discipline your presentation. The quality of presentation reflects the quality of your own mind and preparation. Poorly conceived, badly written, imperfectly edited, even misspelled memos do an injustice to all concerned. They also destroy your credibility as an advisor.

Good writing takes time and practice. No one gets it right in the first draft. That’s why, in this note, we have laid out some precise features to focus on in writing your memos. You must know your audience, what they need to know, and present it to them in a clear fashion. To do this you must develop a system of writing and be willing to search for help if necessary. In your writing, strive for five important qualities: simplicity, straightforward sentence structure, clarity, clearly assigned action and responsibility, and correctness. Finally, organize your memo well, by putting the important arguments up front, using clear transitions, and allowing your format to help the information flow smoothly. By including these features, your memo will communicate what you want it to.

Most decision makers have little time; they value clarity, conciseness, and accuracy. They appreciate clear formats that enable them to find summaries and needed information quickly during a discussion. Above all, they respond to well-crafted memos that account for their needs and help them make and defend a good decision.

**NOTES ON E-MAIL COMMUNICATIONS**

E-mail is no longer a form of communication limited to the scientific and university communities. Today, people use the internet widely for day-to-day communication in both the private and public sectors. While this note refers to the need to write memos clearly and succinctly, owing to the small amount of time your principal has to read them, e-mail correspondence is more rushed, necessitating even greater brevity and clarity. Many organizations now default to email communications in lieu of traditional memos as decision making tools.
Not only is e-mail communication often rushed, but its clarity is also complicated by variations in e-mail software and hardware platforms. When composing memos for e-mail, it is therefore important to remember and think about the following:

**E-mail is an “official” form of communication in a workplace.** “Official” means that e-mail messages are legal business documents. Beware of writing anything that you would not write in a paper document for distribution. E-mail messages are now regularly subpoenaed in courts and most public organizations are subject to the Freedom of Information Act. Many public figures like Oliver North and Bill Gates find themselves trapped by public revelations of inappropriate e-mail.

**Think before you type!** Many argue that e-mail should be a spontaneous, free flowing form of communication. Because of the potential legal ramifications, however, do not get pulled into E-mail Wars by responding immediately to negative messages you receive. If the message’s intent or meaning is unclear, wait before responding. E-mail is faceless and interpreting the intent and feelings of senders can be very difficult. Think through your concerns or anger, and compose your response in a professional manner. Better yet, consider talking to the sender in person to assure that neither party further misinterprets written words or intentions.

**Be clear and concise, and use formatting tools and spacing to increase legibility.** What you write in an e-mail should be just as clear and contain the same level of professionalism as any written document you produce. If your inter-office e-mail software allows it, use bullets, italics and bold text to help your readers find what they need quickly. Be aware, however, that when you send messages to people outside your workplace, many of your special formatting features may not appear on their screens the way you see them.

Using line breaks (space between paragraphs) instead of long, continuous paragraphs makes your messages easier to read on a computer screen. The easier and more visually accessible your message is, the more likely it is to get read in its entirety!

**Beware!!! Most e-mail programs do not check spelling and grammar!** Always check your spelling and sentence structure, and read carefully for typographical errors before hitting the “Send” button! Grammar is a discipline that invites reflection and should not be abandoned in e-mail communication. E-mails need to be proofed, sometimes off a written copy, to avoid the embarrassment of spelling someone’s name wrong or sending an incorrect phone number or address to multiple recipients.