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Writing effective policy memos

What is a policy memo?

A policy memo is a document that provides analysis and/or recommendations for a particular audience regarding a particular situation or problem. A well-written policy memo reflects attention to purpose; it is well organized; and it has a clear, concise style.

Determining and responding to your audience

In most cases, you will know the audience for your work because (1) you have been hired by that individual or organization or (2) your instructor provides that information to you. Think carefully about the needs and expectations of your audience. For example, if your audience is an elected official seeking analysis on a highly technical matter, you should generally assume that the official lacks substantial technical expertise. You will need to define technical terms and provide enough background about the situation you are discussing that such a “lay” audience can grasp your arguments. On the other hand, if you are writing for a technically trained audience, you will waste time and energy providing background information that your readers already know.

Organizing an effective policy memo

Introduction

One distinguishing characteristic of a policy memo is that a summary of the document’s conclusion(s) and recommendation(s) is placed right at the beginning of the memo. Remember that the purpose of the document is generally to provide your audience advice about a particular decision, project, or policy stance. Thus, you open the memo by summarizing the problem or situation about which you are writing, and by providing a very brief summary of the conclusions/recommendations you have reached during your analysis. The rest of the memo is designed to support the conclusions or recommendations you present.

Background

Keeping in mind that different audiences need different amounts of background information (see above), follow your introduction with a concise summary of any historical or technical that your audience needs to understand the arguments you are building. (It may be that no background information is needed at all.)

Supporting arguments or analysis

Once you have set the stage for your audience, show how this information leads logically to the conclusions/recommendations you have provided.

Style and format

Your ideas will be no more meaningful to the reader of your memo than you are able to make them. Meaning is not just embellished by style; rather, the two must function together. Muddled writing reflects hazy thinking. Your prose should be simple, clear, and easy to read; you will confuse, not impress, your readers with sophisticated vocabulary. Your reader should be able to describe your conclusions and the general arguments you used to reach them after only one reading of your memo.

Some tips on achieving an effective writing style:

- (1) Choose the simplest words available to express your ideas. When discussing technical information, avoid the use of jargon--or at least define your terms clearly.
- (2) Make your sentences “active”; avoid phrases such as “there are” or “it is.”
- (3) Use one paragraph to develop one idea or argument. Make that idea or argument explicit within the first one or two sentences of the paragraph.
- (4) **PROOFREAD CAREFULLY.** Don’t distract your readers from the content of your memo with poor spelling or grammar.

The format of the memo should be as follows:

- (1) Memos must be typed on 8.5 X 11” or A4 paper with margins of one inch on all sides.
- (2) Paragraphs should be single-spaced and should be separated by a double space.
- (3) You may use any standard conventions for the layout of your memo, including numbering, bullets, indentation, etc. Do address the memo to your audience at the top of the page. See the attached sample for a suggested layout.

Length

The length of your policy memo assignment will be announced in class. Do not exceed this length limit! I am enforcing this rule for several reasons:

- (1) I assume that you will continue to write persuasive documents for clients and/or colleagues in the future. Like you, most of these people are busy. They rarely have time to review lengthy documents; these generally wind up unread in a filing cabinet or waste basket. I’m hoping to help you craft documents that are concise and of use to your clients or colleagues.
- (2) Confining yourself to a particular page limit encourages careful editing, establishing priorities, and paring your arguments down. In general, these practices also improve the flow and impact of your writing.
- (3) Tightly written policy memos have a much better chance of influencing others toward a particular point of view.

Getting help

I strongly recommend that you exchange your memos with other students in the class for proofreading and editing before you submit them. You can help one another with suggestions for clarity and content of your assignments.

MEMORANDUM

TO: Dr. Jane Doe, President
Commission for Economic Sustainability

FROM: David R. Ortiz, Analyst

DATE: 7 October 1995

RE: Fuelwood management in Country Central

Introduction

The situation regarding fuelwood availability in Country Central is not yet at a crisis stage. Forests and arable land are readily available for use by the people. Deforestation is minimal compared to our neighboring counties. Yet economic conditions force the majority of the fuelwood to be collected illegally. Thus, I propose three major reforms to alleviate the problem of illegal fuelwood collection. First, we should offer individual communities small plots of forest for tenuring. Second, we should establish a network of regional fuelwood management offices to monitor the illegal trade of fuelwood, to encourage fuel efficiency, and to offer technical assistance for the sustainable use of tenured forests. Third, a system of forest plantations should be developed to ensure future fuelwood supplies.

Current land tenure situation in County Central

Residents will continue to collect fuelwood illegally until they are otherwise guaranteed a supply. Land tenure offers the beneficiaries a direct reimbursement for their efforts. A number of key points support a system of land tenure:

- (1) The rural population does not have a financial means to purchase land at this time. Foreign ownership as well as ownership by the wealthy of County Central could lead to limited access to forests for the poor. This maldistribution of forest resources could have long term economic effects.
- (2) Land ownership means power. With recent government changes, we cannot afford to unleash this power to the people at this time. Actual ownership of the land should remain in the hands of the government.
- (3) A system of tenure allows for better government regulation over changes in the forest resource base. Regulation of private forest lands with our limited work force would be impossible.

In lieu of efficiency concerns, a system of community tenured regions would better accommodate current circumstances. The state forest should be divided into regions, each village or community having an assigned region. The concept of a community region is more realistic than individual tenure due to the unmanageable number of technicalities which would be encountered. Ecological impacts are location specific. These regions should be monitored by regional fuelwood management offices.

Regional fuelwood management offices

Management of the harvests of fuelwood will require local regulation. Your proposal should include the establishment of regional fuelwood management offices to facilitate the transition

from an illegal market to legal and organized cooperation. The regional offices will have the following roles:

- (1) Report and regulate the flow of illegal fuelwood to the central government office so that regulations can be modified for improved efficiency;
- (2) Instruct villagers on maximizing use of fuelwood products by encouraging use of efficient stoves and kilns;
- (3) Instruct villagers on proper forest management for long-term goals of sustainability. This instruction could also include the role of proper management in erosion control and watershed protection.

The regional fuelwood management offices should include a number of representative groups. Involvement of the local community is a requirement for success. Local farmers and leaders know the region, its customs and its people. In addition, an administrator from our government should be available to act as a liaison and to provide a political update on the situation. Some technical expertise will be required.

Future issues

Our government must plan for the future energy needs of County Central. The World Bank has proposed a hydroelectric power plant which would supply one quarter of current energy needs. This project should be carefully assessed. Special consideration should be given to ecological impacts of the building of the plant, dependence upon foreign technical expertise, and implications for the debt situation. I am skeptical of its success because of the history of failures of these types of development efforts.

Alternatively, our east coast has tremendous excess of arable land which can be developed for forest energy. Long-term planning should maximize use of this land by developing forest plantations. Coupled with these long-term plans for forest plantations should be a program for infrastructure changes which can assist in transporting the fuelwood to villages throughout the county.

Implementation

The creation of regional fuelwood management offices and the allocation of forest regions will require some time. Due to the lack of other available energy sources, it is recommended that residents be permitted to continue collecting fuelwood as previously practices until the fuelwood management program is implemented.

Implementation of these reforms can only take place with your assistance in quality legislation. Outlined above are three major reforms to improving fuelwood management in County Central: development of a community land tenure program, establishment of regional fuelwood management offices, and development of forest plantations along the east coast. These reforms offer the most viable solutions to fuelwood management.

GRAMMAR AND PUNCTUATION RULES

Punctuation

Rule 1: Periods and commas always go inside quotation marks, even inside single quotes.

Examples:

The sign changed from "Walk," to "Don't Walk," to "Walk" again within 30 seconds.

She said, "Hurry up."

She said, "He said, 'Hurry up.'"

Rule 2: To avoid confusion, use commas to separate words and word groups with a series of three or more.

Example:

My \$10,000,000 estate is to be split among my husband, daughter, son, and nephew.

(Omitting the comma after son would indicate that the son and nephew would have to split one-third of the estate.)

Rule 3: Use a comma to separate two adjectives when the word “and” can be inserted between them.

Examples:

He is a strong, healthy man.

We stayed at an expensive summer resort.

(You would not say “expensive and summer resort,” so do not use a comma.)

Rule 4: Use a comma when an -ly adjective is used with other adjectives. To test if an ly word is an adjective, see if it can be used alone with the noun. If it can, use the comma.

Examples:

Felix was a lonely, young boy.

I get headaches in brightly lit rooms.

(“Brightly” is not an adjective because it cannot be used alone with “rooms.”)

Rule 5: Use commas to set off expressions that interrupt the flow of the sentence.

Example:

I am, as you have probably noticed, very nervous about this.

Rule 6: When starting a sentence with a weak clause, use a comma after it. Conversely, do not use a comma when the sentence starts with a strong clause followed by a weak clause. (See pages 6 and 7 for more about clauses.)

Examples:

If you are not sure about this, let me know now.

Let me know now if you are not sure about this.

Rule 7: Use a comma after phrases of more than three words that begin a sentence.

Example:

To apply for this job, you must have previous experience.

Rule 8: Use the semicolon in place of a period to separate two sentences where the conjunction has been left out.

Examples:

Call me tomorrow; I will give you my answer then.

I have paid my dues; therefore, I expect all the privileges listed in the contract.

Capitalization

Rule 9: Capitalize points of the compass only when they refer to specific regions.

Examples:

We have had Presidents from the South.

Go south three blocks and then turn left.

We live in the southeast section of town. Southeast is just an adjective here so should not be capitalized.

Subject/verb agreement

Rule 10: Two singular subjects connected by or or nor require a singular verb.

Example:

My aunt or my uncle is arriving by train today.

Rule 11: Two singular subjects connected by either/or or neither/nor require a singular verb.

Examples:

Neither John nor Susan is available.

Neither she nor I am going to the festival.

(NOTE: “Am” is singular and agrees with the subject closest to it.)

Rule 12: As a general rule, use a plural verb with two or more subjects when they are connected by “and.”

Example:

A car and a bike are my means of transportation.

Rule 13: The pronouns “each,” “everyone,” “everybody,” “anyone,” “anybody,” “someone,” and “somebody” are singular. Do not be misled by what follows “of.”

Examples:

Each of the girls sings well.

Every one of the cakes is gone.

Rule 14: With words that indicate portions—percent, fraction, part, majority, some, all, none, remainder, etc.—you must look at the object of the preposition to determine whether to use a singular or plural verb. If the object of the preposition is singular, use a singular verb. If the object of the preposition is plural, use a plural verb.

Examples:

Fifty percent of the pie has disappeared.

“Pie” is the object of the preposition “of.”

Fifty percent of the pies have disappeared.

“Pies” is the object of the preposition.

One third of the city is unemployed.

One third of the people are unemployed.

All of the pie is gone.

All of the pies are gone.

Some of the pie is missing.

Some of the pies are missing.

Rule 15: Use a singular verb with sums of money or periods of time.

Examples:

Ten dollars is a high price to pay.

Five years is the maximum sentence for that offense.

Rule 16: Use the he/him method to decide which word is correct.

he = who

him = whom

Examples:

Who/Whom wrote the letter?

He wrote the letter. Therefore, “who” is correct.

For who/whom should I vote?

Should I vote for him? Therefore, “whom” is correct.

We all know who/whom pulled that prank.

This sentence contains two clauses: We all know and who/whom pulled that prank. We are interested in the second clause because it contains the who/whom. He pulled that prank. Therefore, “who” is correct.

Rule 17: “Who” refers to people. “That” and “which” refer to groups or things.

Examples:

Glen is the one who rescued the bird.

She belongs to an organization that specializes in saving endangered species.

Rule 18: “That” introduces essential clauses while “which” introduces nonessential clauses.

Examples:

I do not like editorials that argue for racial differences in intelligence.

(We would not know which editorials were being discussed without the that clause.)

The editorial arguing for racial differences in intelligence, which appeared in the Sunday newspaper, upset me.

(The editorial is already identified. Therefore, “which” begins a nonessential clause.)

(*NOTE:* Essential clauses do not have commas surrounding them while nonessential clauses do contain commas.)

Style

Rule 19: Use active voice whenever possible. Active voice means the subject is “doing” the verb.

Examples:

(Active) Barry hit the ball.

(Passive) The ball was hit. *or* The ball was hit by Barry.

Rule 20: Avoid overusing “there is,” “there are,” “it is,” “it was,” *etc.*

Example:

There is a case of meningitis that was reported in the newspaper.

Correction:

A case of meningitis was reported in the newspaper.

Even better:

The newspaper reported a case of meningitis. (Active voice)