How to write an effective policy memorandum

This session will cover:
1. The purpose of a policy memorandum
2. Understanding the policymaker
3. Components of an effective policy memorandum
4. Sample formats
5. Introduction to a case-study exercise
Purpose of a policy memorandum

- Provides busy policymakers with information they need to do their jobs
- Breaks down complex issues into essential facts
- Evaluates alternative courses of action
- Provides recommendations for action
Understanding the policymaker

- Needs to master complex, substantive issues in a short time
- Needs to make decisions based on partial or imperfect information
- Motivated to satisfy boss or constituents
The higher up in the hierarchy....

- The less the policymakers knows about any one issue
- The less he/she is able to focus on one issue
- The more he/she will prefer oral briefings
- The more he/she will be influenced by political considerations
Some policymakers...

- Decide based on gut reactions or instincts
- Take the advice of certain trusted individuals
- Do their homework and ask good questions
- Are overly concerned with details

→ Know your policymaker!
Policy decisions are based on a combination of...

1. Seniority, personal relationships, and making deals
2. Rational ideas and arguments offering technically sound solutions
Remember:
Policymakers make decisions every day based on incomplete or imperfect information
Your job is to...

Provide the best available information on the problem and evaluate possible solutions
An effective policy memo should...

- Explain why the issue is important, why a decision needs to be made
- Provide essential facts and supporting evidence
- Provide clear courses of action
- Give some assessment of the political environment
An effective policy memo should...

- Be no longer than 3–5 pages (double spaced)
- Contain all key information in the first paragraph
- Include the following:
  - Heading
  - Summary
  - Background
  - Issues
  - Options
  - Recommendation
- Avoid technical jargon
Structure of a policy memo: The heading

To: Name and title
From: Your name and affiliation
Subject: Tailor the subject to the decision to be made
Date: The date when you send it to the policymaker
Structure of a policy memo: The summary

The summary should include:

- The issue
- Why a decision is needed
- What key information is contained in the memo
- What course of action is recommended
Structure of a policy memo: The background

The background should:

- Consist of brief, essential points
- Explain how this issue has evolved or become a concern
Structure of a policy memo: The issues

The issues section should include:

- Key issues to be addressed by policymaker
- 1–3 points maximum
- What position(s) others have on these issues
Structure of a policy memo: Options for the policymaker

The options section should include:
- Plausible courses of action
- Pros and cons of each option
- Risks/potential opposition that might result from choosing an option
Structure of a policy memo: Recommendation

- What do you want the decision maker to do?
- Why are you making this particular recommendation?
When writing a memo, ask yourself...

- What is the main message?
- What do I want the policymaker to remember?
- Are the recommendations feasible? Convincing?
- What are the political risks to the policymaker if the recommendations are followed?