



WRITING EFFECTIVE MEMORANDA: PLANNING, DRAFTING, & REVISING

Memoranda are a common form of correspondence sent within an organization. Memos are concise, focused examples of persuasive writing because they typically require a particular course of action, and are audience specific.

Prior to writing, it is necessary to take the time to plan your memo. Planning your memo will actually save you time rather than if you merely start composing without a clear sense of direction.

Planning: Purpose, Audience, and Organization

Purpose and context

Consider the following planning steps:

- Determine your specific purpose for writing the memo
- Determine some of the ideas you want to convey
- Develop your purpose into a focused, and concise working statement

Audience

Analyzing your audience will help you make effective writing decisions. Consider the following questions:

- Journalistic “w” questions: who, what, when, where, why, and how
- Who is your audience?
 - What characterizes your audience? Think in terms of age, culture, education, gender, geographical region, interests, language, marital status, occupation, politics, religion, etc.

This teaching resource has been provided for members of the Electronic Hallway with the express permission of the author, Talitha May, Writing Instructor at the Graduate Writing Center, at the LBJ School of Public Affairs, University of Texas, Austin.

The Electronic Hallway is administered by the University of Washington's Daniel J. Evans School of Public Affairs. This material may not be altered or copied without written permission from The Electronic Hallway. For permission, email hallhelp@u.washington.edu, or phone (206) 616-8777. Electronic Hallway members are granted copy permission for educational purposes per Member's Agreement (www.hallway.org).

- What are your audience's expectations?
- How much does your audience know about the background of what you are writing about?

Develop an organizational pattern

You may organize your memo in various ways depending on the context of your memo; however, most memos are chronologically organized and answer the following questions:

1. **Current situation:** What is the problem or the issue? Describe the background of your issue by means of a concise executive summary. If your memo is one page or less, provide a one to two sentence purpose statement.
2. **Past situation:** How have you addressed the issue in the past?
3. **Future action:** What should your organization do about the issue in the future? Make a feasible recommendation or ask for a particular course of action.

Additional Organizational Strategies

For more organizational ideas, refer to "Tip 24" of Phillip E. Bozek's book, *50 One-Minute Tips to Better Communication: A Wealth of Business Communication Ideas*.

Drafting

Clearly state your purpose

The first sentence of the body should explain the purpose of the memo. Use verbs that specifically and directly communicate what you want your memo to accomplish, such as to *explain*, to *authorize*, or to *request*:

- I am *requesting* travel funding to Boulder, Colorado to meet with the Governor.
- This memo *presents* the results of the internal audit of the executive branch.
- I want to *congratulate* you on your superior contributions to the EPA.

Develop an executive summary for memos longer than one page

A summary has four main goals:

1. To help the writer stay focused
2. To give readers an overall sense of the memo
3. To remind readers of the main points
4. To enable readers to skip the body if necessary

The executive summary should reflect the tone, content, and 10% of the length of the memo. For one-page memos, it may simply be a concise statement of purpose:

- In August, we completed the first draft of the policy research project on schedule. We presently do not anticipate any delays that would jeopardize our projected completion date.
- This memo outlines a mediation and negotiation process between the conflicting groups.

Write an effective closing statement

Aim to avoid writing overly general closing statements, but end with direct statements of action.

If necessary, make sure your memo provides detailed information by attaching tables, charts, tables, or other detailed information as attachments. Be sure to refer to your attachments in your memo and add a notation about what is attached below your closing statement.

- Attached: Fiscal Reports, August–September 2000
- Attached: Applicant’s résumé

Visual Organization

To aid readability, and organization, consider the following document design techniques:

- **White space**: use to organize information and emphasize important information
- **Headings**: use as navigational tools to assist readers scan for main ideas, or quickly find key information at a later time
- **Ordered and unordered lists** (bullets): use to condense information
- **Italics**: use to emphasize key words
- **Specific subject line in boldface type**: use for emphasis and quick reference

Revising Memoranda

Revising allows you to re-see your memo by examining global issues such as audience, purpose and focus, organization, and development. Review the following checklist when revising and your memoranda:

CONCERN	Revision Questions
Audience	<ul style="list-style-type: none"> ▪ Is your reader familiar with the memo’s topic, and if not, did you provide descriptive background information? ▪ Is the tone courteous? Would you feel comfortable allowing anyone to read or quote your memo?
Purpose and Focus	<ul style="list-style-type: none"> ▪ Is the statement of purpose clear? ▪ Could your reader tell what the intended purpose of the memo is? ▪ Could your reader immediately tell what prompted the need for this memo? ▪ Is the memo appropriate for your writing situation? ▪ Does each paragraph have a central idea that supports your statement of purpose? ▪ Is the subject line specific? Does it provide your topic and purpose? ▪ Are your headings specific enough for your readers?
Organization	<ul style="list-style-type: none"> ▪ Do the most important ideas come first? ▪ Does your organization mirror the sequence of ideas in your statement of purpose? ▪ Will your readers understand the relationships among your headings? ▪ If your memo is one page, does it follow a deductive organization? ▪ Did you provide transitional devices to maintain coherence? <p style="text-align: right;"><i>Continued on next page.</i></p>

<p>Visual Organization and Format</p>	<p style="text-align: right;"><i>Continued from previous page.</i></p> <ul style="list-style-type: none"> ▪ Did you use a template or your organization’s preferred form? ▪ Did you use bulleted or ordered lists to discuss step-by-step procedures? ▪ Did you provide enough white space to aid the memo’s readability? ▪ Did you provide headings for major sections?
<p>Development</p>	<ul style="list-style-type: none"> ▪ Did you describe the current situation with sufficient details? ▪ Did you provide relevant and credible examples to support your recommendations? ▪ Did you provide your reader(s) with all the information they may need?

Editing Memoranda

In contrast to revising, editing focuses on the effectiveness of your words and sentences including topics such as “accuracy,” “economy,” and “consistency” (Palmquist, *Bedford* 231). Review the following checklist when editing your memoranda:

<p>Correctness or Accuracy</p>	<ul style="list-style-type: none"> ▪ Are the names spelled correctly? ▪ Are the job titles correct and up-to-date? ▪ Did you write out the date rather than use the all-numerical format? ▪ Are the times and dates in your memo accurate? ▪ Is your contact information current? ▪ Is your memo free from clichés and does it use precise words that accurately express your main ideas? ▪ Is each sentence complete? ▪ Did you remember to include your attachments if necessary?
<p>Conciseness</p>	<ul style="list-style-type: none"> ▪ Did you remove “unnecessary modifiers” (very, really, somewhat, quite, sort of, etc.)? (Palmquist, <i>Bedford</i> 241) ▪ Did you remove unnecessary introductory phrases (there are, it is, there is, these have, these are, here are, here is)? (Palmquist, <i>Bedford</i> 241) ▪ Did you remove or reduce the use of stock/wordy phrases? <p style="text-align: right;"><i>Continued on next page.</i></p>

<p>Consistency</p>	<p style="text-align: right;"><i>Continued from previous page.</i></p> <ul style="list-style-type: none"> ▪ Did you use concepts consistently? ▪ Did you use numbers consistently? ▪ Did you format your memo consistently? ▪ Are your headings consistent in form? ▪ Did you maintain the same form of each name? Lunsford states, "if you refer to someone as Susan in one sentence, don't switch to Sue in the next" (483).
<p>Tone and Language</p>	<ul style="list-style-type: none"> ▪ Is the language non-sexist? ▪ Is your memo free from technical jargon? ▪ Did you avoid using pompous diction? ▪ Did you use action verbs rather than "to be" verbs? ▪ Are your sentences varied in length and structure? ▪ Are your sentences simple and not too complex?
<p>Spelling, Grammar, and Punctuation</p>	<ul style="list-style-type: none"> ▪ Did you maintain parallelism in bulleted lists? ▪ Rather than relying on your computer's spelling, and grammar tools, did you ask a colleague to proofread your draft? ▪ Did you consult a contemporary dictionary or recently written handbook? ▪ Is the language active, or did you suitably use the passive voice? ▪ Did you read your memo out loud to find any omitted words?

References

Lunsford, Andrea A. *The Everyday Writer*. 2nd ed. Boston: Bedford/St.Martin's, 2001.

Bozek, Phillip E. *50 One-Minute Tips to Better Communication: A Wealth of Business Communication Ideas*. Revised ed. Menlo Park: Crisp Publications, 1998.

Markel, Mike. *Technical Communication*. 6th ed. Boston: Bedford/St. Martin's, 2001

Palmquist, Mike. *The Bedford Researcher*. Boston: Bedford/St.Martin's, 2003.

---. *Overview: Writing Memos*. Dec. 2002. Dept. of English and Composition, Colorado State University. 20 Dec. 2002 <<http://writing.colostate.edu/references/documents/memo/>>.