

# How to Write a Policy Memo

Pete Wilcoxon  
The Maxwell School, Syracuse University  
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## The Big Picture

- Purpose:
  - Inform a **policy maker** about the **consequences of an action**
- Goals:
  1. Good: to be **read** and **understood**
  2. Better: make sure the policy maker is **well informed**
  3. Best: policy maker **forwards the memo** to others
- Content:
  - **Facts** and **supported inferences** – not opinions or speculation
  - **Important issues** – not minor or tangential ones
  - **Authoritative** – able to be trusted as accurate and reliable

## Plan for the Session

1. Introduce an example policy scenario
2. Carry out the analysis
3. Discuss key features of memos
4. Storyboard a memo for the example analysis
5. Practice writing key sections
6. Questions and links for additional information

## Logic behind the example scenario

- Number 1 rule for good writing:
  - Focus on the **reader**
- To do that here:
  - Initially, you're the **policy maker** not the analyst
- What would you want a memo to be like?
  - What should be in it?
  - How should it be organized?
  - How should it be written?

## Scenario: Tax on Ride Sharing Services

- Handout 1: Policy Issue
  - “Policy Scenario: Hypothetical Tax on Ride Sharing Services”

## Effective tax rates

- Tool for evaluating the relative impact of a policy on different income groups
- Ratio of total taxes paid on a good to the income of the buyer
- Example:
  - Alice has an income of \$10,000
  - She buys 100 units of good X
  - She pays \$5 tax on each unit
  - Total taxes paid on X =  $\$5 * 100 = \$500$
  - Effective tax rate =  $\$500/\$10,000 = 0.05 = 5\%$

## Effective tax rates, continued

- Second buyer, Bob:
  - Bob has an income of \$5,000
  - He buys 60 units of good X
  - He pays \$5 tax on each unit
  
- Total taxes paid on X =  $\$5 * 60 = \$300$
- Effective tax rate =  $\$300/\$5,000 = 0.06 = 6\%$
  
- Comparing effective tax rates:
  - Alice: income \$10,000, effective tax 5%
  - Bob: income \$5,000, effective tax 6%
  
- Tax is **regressive**:
  - Higher as a percent of income on people with lower incomes

## Collecting data

- Handout 2: Data Available
  - "Alphaville Ridership Survey"

## Analysis and inferences

- Handout 3: Analysis Needed
  - “Impacts of the Alphaville Ride Sharing Tax Proposal”

## Writing it up: recall the big picture

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## Authoritative, forwardable memos:

- **Content**

- Explanation of proposal
- Current situation
- Sketch of analysis
- Key results
  
- Understandable by itself
- Clear about starting facts
- Clear about inferences
- Avoid speculation
- Avoid we/you

- **Exposition**

- Avoid tl;dr
- Logical flow
- Appropriate paragraphs
- Grammar and spelling
  
- Don't talk down
- Avoid hyperbole
- Avoid jargon if possible
- Be aware of whitespace

Readers will judge the care that went into the **analysis** from the care that went into the **document**.

## Start with high level organization

- One approach: storyboard the memo
- Blocks represent paragraphs, tables or graphs
- Start very coarse and then refine

## Drafting the text

- Write one paragraph for block 1:
  - Short synopsis of policy being considered.
- Fold your paper in half when you're done.

## Critical step: editing

- Swap papers with your neighbors and read 2-3 others
  - You have more experience reading than writing
  - See what works and what doesn't
- Then go back and edit your own draft.
  - What could be clearer?
  - What could be more concise?
  - What needs more explanation?

## Drafting the text, part 2

- Write a brief description of the analysis in block 3a1a:
  - Impacts on riders per capita: Brief description of analysis followed by reference to table of results
- Fold paper in half.

## Same drill on editing

- Swap papers with your neighbors and read 2-3 others
- Then go back and edit your own draft.
  - What could be clearer?
  - What could be more concise?
  - What needs more explanation?



## Additional advice

- On the web:
  - <http://wilcoxen.maxwell.insightworks.com/pages/4443.html>
- In print:
  - Strunk, William and E.B. White, *The Elements of Style*.
  - Smith, Catherine F, *Writing Public Policy*