

Workshop 06

Individual Memo

EPA PCE 2024

Rony Rodrigo Maximiliano Rodriguez-Ramirez

rrodriguezramirez@g.harvard.edu

https://calendly.com/rrmaximiliano/office_hours

Harvard University

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Workshop Objectives

- Understand the structure and purpose of an **Individual Memo**.
- Analyze and critique sample memos from a **client's perspective**.
- Learn strategies for crafting concise, impactful memos tailored to policymaker needs.
- Discuss responsible use of **AI tools** in memo writing.
- Practice framing a memo as a **story**: problem, options, recommendation, and evidence.

Key Elements of a Policy Memo

- **Purpose:** Provide clear, actionable recommendations for your client.
- **Components:**
 - **Recommendation:** What should the client do?
 - **Analysis:** Why is this the best option?
 - **Evidence:** Support your claims with relevant data.
 - **Clarity:** Write so your client can use your memo to convince others.
- **Length:** 400–600 words (excluding tables, figures, and references).

First Activity: Memo Critique (20 minutes)

Out of the 4 memos listed on Canvas:

- Pick one between Example 3 and 4.
- In the first 5-10 minutes, read the memo.
- Remaining minutes discuss the questions in the following slide with the whole group.

You will judge which memo is the “strong”/“weak” one

Option 1: Analyze a Strong Memo

- Review a 2022 memo sample (700–800 words).
- Imagine you are the client listed as the recipient.
- **Questions:**
 - What do you like about this memo?
 - What makes the recommendation clear and convincing?
 - How does it balance brevity with depth?

Option 2: Improve a Weak Memo

- Review a less effective memo.
- Identify weaknesses:
 - Is the recommendation clear?
 - Are the arguments focused and evidence-based?
 - Does it meet the client’s needs?
- Propose revisions to improve clarity and impact.

Memo as a Story: Problem-Solving Framework (10 minutes)

From the examples you just read:

- **Problem:** What issue needs solving?
- **Options:** What alternatives are available?
- **Recommendation:** What is the best course of action?
- **Evidence:** Why is this recommendation effective?

Discuss the consequences of:

1. **Action:** What will improve or change if the recommendation is adopted?
2. **Inaction:** What happens if the client does nothing?

Writing Strategies: Eric Taylor's Guide

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- **Use Visual Aids Effectively:**
 - Include **graphs, diagrams, and tables** to simplify complex data.
- **Reason, Then Communicate:**
 - Every claim must have supporting evidence and reasoning. Anticipate and address the **best counterarguments** to your recommendation.
- **Check for Robustness:**
 - Explicitly state assumptions and test whether changes to those assumptions affect your recommendation.
- **Final Tip:**
 - Tie every point back to what your client cares about most—whether it's cost-efficiency, political feasibility, or another priority.

AI in Memo Writing

- **HGSE AI Policy:** Guidelines for ethical and responsible AI use.
- [Check it here!](#)
- How can AI enhance your work while maintaining originality and analytical rigor?
 - Shall we use AI?

Final Exercise: Elevator Pitch using your PAP

- **Activity:**
 - Write a **1-minute pitch** summarizing your memo.
 - Pair up and exchange feedback.
- **Tips:**
 - Start with the recommendation.
 - Explain the problem and why your solution is best.
 - Tie back to client priorities (e.g., cost, political feasibility).
 - **Peter Wilcoxon** Tip's are excellent, you should use them!! [Link](#)

Takeaways

- A well-written memo is concise, focused, and actionable.
- Tailor the content to the client's priorities and context.
- Approach the memo as a story:
 - problem, options, recommendation, and evidence.

Final Note: It was great meeting you all. I'm always around. Don't hesitate to contact me, anytime :)