

# Lecture 17

## Memorandum

The word memorandum (plural: memoranda) is a Latin word, which means “something to remember” or “reminder” it is often shortened to ‘memo’ (plural: memos). Memo is an informal type of report. Memo may be a note, document or other communication that helps memory by recording events or observations on a topic, such as may be used in an organization. With this background, it might helpful to note that a memo is also called “in house communication”.

Thus, memos are generally used for internal communication between executives and subordinates or between the officers of the same level of an organization. It is also called as inter-office memorandum. As they may convey important information, clarity, careful arrangement, and neatness. A memo does not require a salutation and closing remarks. However, it is alright to initial the memo – beside the name types at the top or at the bottom of the memo – or even sign your name at the bottom. The style and tone of your memo should be the same, whether you are writing to your colleague or your superior. An overfriendly memo in an informal style to the manager may be a sign of disrespect. Paragraphs, however short, must always be numbered to make it easy to read. Memo is also used as a covering note.

### 17.1. Structure

A memorandum is considered the primary source of correspondence within an organization, just as a letter is the primary corresponding document between organizations. In this way, memo is an informal type of report, whereas a letter may be a formal report.

Some organizations have their own printed memo format and template. In case there is no printed memo form, then you write a memo or interoffice correspondence at the center and top of the page. Your memo must be brief and simple. If your memo is long, then it may be sent as an attachment. The information should be directed.

### 17.2. Key Points

- **Avoid personal statements:** Focus on objectivity without personal bias, preference, or interest on display. Avoid subjectivity. Stick to the relevant material.
- **Use a professional tone:** Your tone should be courteous and professional always, and it should convey strength and confidence.

Flawed Example	Better Example
This letter is to inform you that you will attend the upcoming mandatory meeting	We appreciate your attendance at the upcoming mandatory meeting.
You did not assemble the parts correctly, and so the product is malfunctioning.	The product may not work correctly if any errors occur during assembly

- **Use easy to understand language:** Language is always more powerful when you use active, rather than passive verbs. For example, say “agricultural runoff worsens eutrophication” instead of “eutrophication is worsened by agricultural runoff.”

- **Conciseness and clarity should go in line with adequate development of thought:** Make your sentences, paragraph, and overall memo as brief and as focused as possible. Get your purpose straight before you start, then plan what you want to say and in what order. Use your memo layout to help your reader (headings, bulleted lists, white space, as appropriate).

### 17.3. Purpose

The main purpose that a memorandum fulfills is that it aims to record and relay information, and to make brief appeals. Memo is written to persuade others to take action, give feedback on an issue, or react to a situation. However, most memos communicate basic information, such as meeting times or due dates.

In addition, memo is used to establish accountability of things and saves you hassle and time, compared to writing a letter or a detailed, long report. A memorandum is also essential in the field of business as it helps build good relationships between higher authority and employees. In establishments and offices, memos are used to relay information to employees regarding events or any other changes that have been made in the company. Memos are generally less formal than a letter. Memos are an effective way to announce events such as office parties, death, incentives, new employees and holidays etc. Though such activities aren't directly work related, they do serve to unite employees and boost morale.

### 17.4. Elements of an Effective Memo

An effective memo:

- grabs the reader's attention
- provides information, makes a recommendation, or asks for action
- supports your position or explains benefits to reader
- mentions next steps and deadlines

When composing a memo, always consider the three stages of writing: plan what you want to say, write a draft, revise the draft, edit and proofread it and then finally publish it.

### 17.5. Audience analysis

Audience analysis involves assessing the audience to make sure the information provided to them is at the appropriate level. If you have typical audience, e.g., co-workers and colleagues, their focus will be on the main point since they share a similar background as you. Known if talk about Separate department they are less familiar about the issue, project or event so they provided by detailed background information. It is better to provider a context because if someone out outside the organization want to know about the project they have some context in form of information so that they know what is going on.

### 17.6. Conclusion

By following these memo examples and addressing your audience in clear, concise language, you'll be able to effectively communicate with your coworkers in all your correspondence.

### 17.7. Guidelines and Tips

- **Clear subject line:** The subject line should be very specific to the topic or purpose of the memo. Subject lines are important to memos (as well as emails) because they have a large impact on whether

or not the recipient reads the message. A vague subject line could cause the recipient to discard the memo (or delete the email) without reading it.

- **State your purpose in the first paragraph:** This is clubbed under the pre-writing stage of the memo. In

this stage, an audience analysis should be kept in mind and purpose of writing a memo should be well-identified. Supply any relevant background information. Identify any task the memo is related to.

- **Summarize any potential objections:** Convey the information and supporting details relevant to the memo's purpose. Keep sentences tight and informative. Use bullets to list information.
- **Keep paragraphs short:** Keep paragraphs short and focused; one main idea per paragraph is a good rule of thumb for easy reading.
- **Use subheads between paragraph groups:** In long memos, headings are a great way to divide the material into manageable segments. They not only call attention to main topics but they let the reader know when there is a change in topic.
- **Use bulleted and numbered lists:** These help in clarification and ease of reading. It is easy to lose track in long lists separated by comas.
- **Request action:** With a closing, be precise on what needs to be done.

- Be concise: Include as much information as necessary. Memos should be short and concise; try to keep them to one page. If it is necessary to include lists, charts and graphs at the end, mention how these attachments are important to your memo.

## 17.8. Types of Memorandum

There are many types of memos and may roughly be categorized as either one of the following:

- Information Memo
- Problem Solving Memo
- Persuasion Memo
- Internal Memo Proposal
- Directive Memo
- Response to an Inquiry Memo
- Trip Report Memo
- Field Report/Lab Report Memo

### 17.8.1. Information Memo

Information memo is used to deliver or request information or assistance.

**Structure:**

- First part provides main idea.
- Second part expands on the details.

- Third part outlines the action required.

\_\_\_\_\_ Better Widget Makers, Inc. \_\_\_\_\_

## MEMO

**TO:** Finance Committee Members      **DATE:** October 20, 2003  
**FROM:** Ida Mae Knott                      **SUBJECT:** Bakery Bid Report

As agreed upon at the September 19<sup>th</sup> meeting of the Finance Committee, bids to outsource the bakery product needs of our new cafeteria were solicited from three area vendors. I have met with representatives from each and carefully examined their proposals.

Since it is company policy to avoid the lowest and highest bids, the revised operating budget and supplementary information attached to this memo is based on numbers furnished by the Golden Bread Company.

Included for your review and approval are the following items:

### **Golden Bread Co. Information**

- Wholesale price sheets
- Quantity cost break formulas
- Delivery and other service charges
- Annual contract discount structure
- Annual contract and credit application

### **Accounting Department Information**

- In house vs. outside contract comparison report
- Bakery product line-item expenditure worksheets
- Revised payroll/payroll burden worksheets
- Revised pro forma and annual cafeteria operating budget proposal

I have met with the Golden Bread Company's sales manager and their Vice President of Sales and Marketing and have been assured that that we will receive excellent service. It is my recommendation that we sign them to an annual contract. They are located here in Silver City and doing so will be in keeping with our established policy to support the local business community.

Should it be necessary, I will be available this afternoon during the regularly scheduled finance meeting and will be happy to sit in and answer any questions. My office extension is # 29.

*Figure 1 An information memo. Source:*

[https://writing.colostate.edu/guides/documents/business\\_writing/business\\_memos/informational/sampleinformationalmemo.pdf](https://writing.colostate.edu/guides/documents/business_writing/business_memos/informational/sampleinformationalmemo.pdf)

### 15.8.2. Problem Solving Memo

This type of memo suggests a specific action to improve a situation.

#### Structure:

- First part states the problem and gets right to it.
- Second part analyzes the problem with details pertaining to who and what is affected by the problem.
- Third part makes a recommendation. When making a recommendation, include not only the positive details but also the drawbacks and diffuse them yourself to minimize the problem.

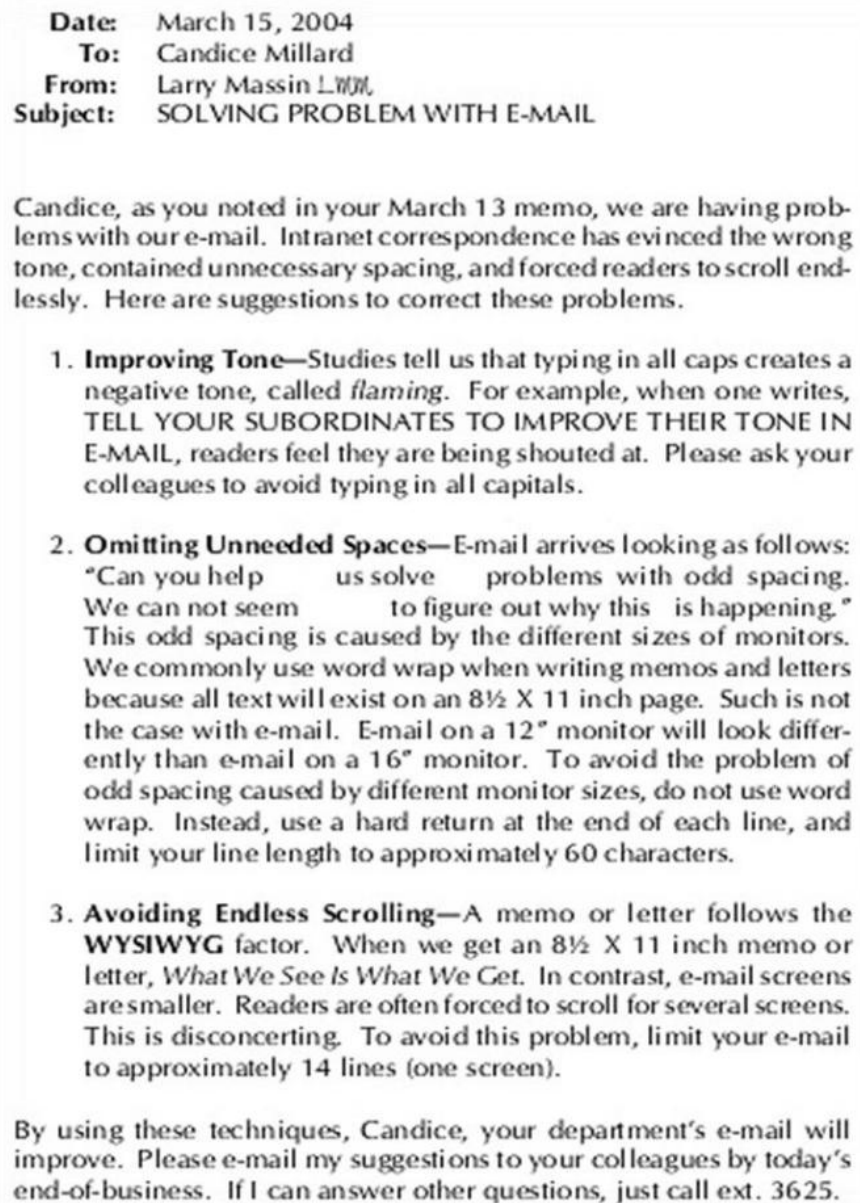


Figure 2 Example of problem solving memo. Source: <https://image.slidesharecdn.com/tbwritingbook-140206004733-phpapp01/95/tb-writing-book-40-638.jpg?cb=1391647668>

### 15.8.3. Persuasion Memo

Persuasion memo is used to encourage the reader to cooperate in a desired action.

**Structure:**

- First part begins with an agreeable point
- Second part introduces the idea
- Third part states benefit to the reader
- Fourth part outlines the action required
- Final part ends with a call to action

**MEMO**

DATE: March 2, 2010  
TO: Jesus  
FROM: James Ullery  
SUBJECT: INCREASING DEATHS WITH THE CONSUMPTION OF PEPSI

Jesus, ever since Pepsi had been created deaths now in the millions have occurred from its effects. I studied the deadly beverage and found possible causes for this to be happening. I have also come up with some possible solutions to stop the spread of such evil. Below are some problems and possible solutions.

<b>Problems/Causes</b>	<b>Solutions</b>
Pepsi has one of the most plain and boring can designs the world has ever seen.	Dispose of all Pepsi cans.
Pepsi is one of the stupidest names I or anyone has ever heard and the sound of it alone kills me a little inside.	Erase all knowledge of that name from existence.
Pepsi tastes extremely terrible and is almost like pure aspartame.	Drink Dr Pepper

**Recommendations:**

These solutions should stop the deaths of thousands around the world, take Obama out of office, and end world hunger. If additional problems occur, we'll probably need to form a strike force to assassinate all existing believers in Pepsi. Please let me know your decision by 3/8/2010 so we can take action before the end of all that is good is at hand.

Figure 3 Another example of a problem-solving memo. Source: <https://www.slideshare.net/ullery1989/problem-solution-memo>

### 15.3.4. Internal Proposal Memo

Such a memo is used to convey suggestions to senior management.

#### Structure:

- First part states reason for writing
- Second part outlines present situation and states writer's proposal
- Third part describes advantage(s)
- Fourth part mentions and diffuses disadvantage(s)
- Fifth part ends with a call to action

**Community Housing  
Partnership**

# Memo

**To:** TCAC Working Group

**From:** David Schnur

**Date:** October 16, 2009

**Re:** Scoring Proposal for Homeless Assistance & Special Needs/SRO Projects (revised)

**Issue:** The operation and management of projects serving homeless and special needs households has unique characteristics, and expertise with more typical affordable housing developments does not convey expertise in the skills needed to run housing for these specialized populations. However, the current TCAC scoring criteria do not distinguish between affordable and supportive housing in awarding points for general partner and management experience (Sec. 10325(2)(a) and (b)).

**Proposal:** Develop a different GP and management company experience scoring methodology for projects applying as homeless assistance projects under the non-profit set-aside and under the special needs/SRO set-aside. This methodology should only consider the number of projects serving the specified population, and sponsors should document that the listed projects indeed serve that population.

The current scorings is as follows:

<u>GP Experience</u>	<u>In service &lt; 3 yrs</u>	<u>In service &gt; 3 yrs</u>
1-2 projects	1 pt	2 pts
3-6 projects	3 pts	4 pts
7 or more projects	5 pts	6 pts

<u>Mgmt Experience</u>	<u>In service &lt; 3 yrs</u>	<u>In service &gt; 3 yrs</u>
2-5 projects	0.5 pts	1 pt
6-10 projects	1.5 pts	2 pts
11 or more projects	2.5 pts	3 pts

For homeless assistance and special needs/SRO projects, the scoring methodology should sponsors to opt for an alternative method (similar to MHP-Supportive) that considers only projects serving a comparable population – "comparable" meaning another tax credit project serving homeless (for homeless assistance projects) or special needs/SRO (for that set-aside) populations. Given the more limited number of such projects in any organization's portfolio, the required number of projects should be reduced as follows:

<u>GP Experience</u>	<u>In service &lt; 3 yrs</u>	<u>In service &gt; 3 yrs</u>
1 project	1 pt	2 pts
2 projects	3 pts	4 pts
3 or more projects	5 pts	6 pts

**Reference:** [http://protectletters.net/wp-content/uploads/2017/05/memorandum-proposal-example-business-proposal-memo-example\\_408154.png](http://protectletters.net/wp-content/uploads/2017/05/memorandum-proposal-example-business-proposal-memo-example_408154.png)

Figure 4 An internal proposal memo



#### 15.3.5. Directive Memo

A directive memo states a policy or procedure you want the reader or co-worker to follow.

**Structure:**

Length depends on space required for explanation. This is determined by nature of the audiences. The memo should begin with a clear and concise statement of purpose. Example: "The purpose of this memo is to let all members of the ABC Department know that doughnuts will be provided every Friday morning at 9:00 AM." Purpose is followed by statements providing a rationale.

#### 15.3.6. Response to an Inquiry Memo

The purpose of this memo is to provide the audience with desired information.

**Structure:**

- First part states purpose statement, which is to respond to a request.
- Second part summarizes the requested information.
- Third part has a discussion, highlighting and emphasizing the important information.
- Final part is call to action.

Remember to state the additional action to be taken to rightly address the issue.

### 15.3.7. Trip Report Memo

In professional scenarios, a trip memo is used for a supervisor after an employee returns from a business venture.

**Structure:**

- First part has statement of purposes, i.e., provides information on trip.
- Second summarizes clearly and concisely (ideally!) outline of your trip.
- Third part involves a discussion, which highlights and emphasizes important information.
- Final part includes action to be taken to rightly address the issue.

### 15.3.8. Field Report Memo

Memos are often used to report on inspection and procedures. These memos, known as field or lab

reports, include the problem, methods, results, and conclusions, but spend less time on the methods section.

**Structure:**

Naturally, a field or report memo should begin with a purpose. This varies according to nature of work. In the next section, a summary of the complete memo should be provided. Problem leading to the decision to perform the procedure is discussed next followed by methods, results, conclusions and recommendations. The details for these have already been extensively discussed.

Note: Other references used to construct this handout are:

1. <http://www.kean.edu/~cpdonova/HowtoWriteaMemo2.pdf>
2. [https://www.scribendi.com/advice/memo\\_examples.en.html](https://www.scribendi.com/advice/memo_examples.en.html)
3. <https://www.slideshare.net/ullery1989/problem-solution-memo>
4. <http://blog.rescuetime.com/2010/05/24/the-tragic-cost-of-google-pac-man-4-82-million-hours/>