MEMORANDUM

To: Graduate Students, Museum Studies
From: Professor Max A. van Balgooy, George Washington University
Subject: Writing Professional Memos in Managerial Format
Date: November 9, 2025

In this course—and throughout your museum career—you will frequently prepare memos for supervisors, staff, or board members. While every museum has its own communication culture, this overview will help you write professional, decision-ready memos using the Managerial Format in the *FranklinCovey Style Guide*, a widely used standard for executive communication. For additional guidance, see the sections titled **"Memos"** and **"Organization."**

Core principle: Lead with the answer. Managers want conclusions and recommendations first — not process, analysis, or background.

Managerial Format Principles

Follow these practices	Avoid these habits
Lead with recommendations	Building to the conclusion at the end
Organize points by importance	Organizing points chronologically or narratively
Order lists in descending order of importance	Listing points in random order
Use numbered lists for ranked importance	Using bullets for ranked items
Use bulleted lists only if items have equal weight	Using bullets for everything
Write for scanning	Writing for close reading
Use action verbs	Using passive or academic phrasing

Required Memo Structure (Introduction → Recommendations → Findings)

1. Opening (1–3 sentences)

State:

- Why you are writing (what prompted the memo, what is the purpose)
- Your top recommendation(s) or decision(s)

Example:
In response to the board's request at its last meeting to highlight current priorities, I recommend the museum expand its transparency practices, increase fundraising efforts, and offer staff development beginning in Q2 2026. My recommendations are based on the American Alliance of Museums' Standards and a review of the museum's financial statements for the past three years. To support these recommendations, the following actions are proposed:

Use **transition statements** or headings between sections. As memos become shorter, use transitions. As reports grow longer, use headings.

2. Recommendations (in descending order of importance)

Order by most to least important using a **numbered list**:

1. *Publish the strategic plan and IRS Form 990 online by Q2 2026 to meet AAM transparency standards.*
2. *Expand annual fundraising into a biannual event beginning in 2026 to increase contributed revenue.*
3. *Launch organization-wide training in internal communications and culture in FY2026 to improve staff productivity.*

If recommendations are of equal importance, use **bulleted lists.** Key test: If you can answer, *"Which of these is most important?"* use numbers, not bullets.

If appropriate, follow each recommendation with a brief **rationale**, considering cost, risk, or impacts on resources (why it matters, benefits/risks).

3. Key Findings (also ranked by importance unless equal)

The findings below explain why these actions are necessary:

1. *Peer institutions publish strategic plans, 990s, and impact reports on their websites.*
2. *The museum currently hosts only one major fundraising event per year.*
3. *Staff interviews reveal inconsistent internal communication practices.*

Follow each finding with **evidence** (standard, data, policy, or source) in 1-3 sentences.

Let Your Writing Be Clear, Concise, and Confident

Use this	Not this
"Publish the plan by Q2 2026."	"The museum should consider publishing…"
"Expand the fundraiser to biannual."	"Fundraising could be increased…"
"Implement staff training in FY26."	"Training opportunities might help…"

Final Checklist Before Submitting

☐ Opening contains context, purpose, and a preview of recommendations
☐ Recommendations appear first, ranked by importance
☐ Only equal-weight items receive bullets
☐ Language is directive, not descriptive
☐ Sections are short and easy to skim
☐ No long paragraphs, no narrative build-up to a conclusion
☐ Transition statements or headings between sections
☐ Avoid acronyms and jargon if unfamiliar to readers