Overview

Students in the IGA-211 Harvard Classroom are required to submit Strategic Options Memos and Outlines. The online HKS-211x class will submit outlines only, not full-length memos. Just like the real-world, this class requires you to adhere to a set of guidelines and standing operating procedures (SOPs) regarding the submission and formatting of these materials.

Submitting Assignments:

All assignments must be emailed to their assigned Teaching Fellow by 6 p.m. U.S. Eastern Standard Time on the due date in order to receive credit toward a certificate.

Memos and outlines should be labeled as follows:

Case X – XXX Outline (Author’s Last Name)
Example: Case 1 – Syria Outline (Allison)

Examples and Assistance:

Examples of Strategic Options Memos and Outlines are attached to the application form (please note that these examples are above average memos and outlines from previous years—they are not perfect answers).

Guidelines for Strategic Options Memos:

Strategic Options Memos are a means of communicating policy analysis and recommendations to senior policymakers. Effective written communication is essential to success both in government and in this class. The following guidelines are not to be a procrustean bed. They identify the questions a good memo in HKS-211x must cover. They provide a baseline that can serve as an outline for a good memo. They identify the criteria that will be used in evaluating memos and outlines. Thus when in doubt, follow the guidelines. Remember that the strategic options you are presenting must be in the national interests of the person you are advising, not the interests of the nation of which you are a citizen. For example, in the Syria case, you are asked to take as your coordinates the national interests of the U.S., not those of Syria or neighboring countries. In future cases where you are asked to imagine that you were working for the Israeli Prime Minister or the Iranian Supreme Leader, it is that nation’s interests that you seek to identify strategies to advance.
Guidelines for Strategic Options Memo OUTLINES:

For HKS-211x, you will be drafting Strategic Options Outlines. Drafting outlines requires doing most of the analytic work required for a three-page Strategic Options Memo.

 Formatting: Outlines should adhere to the following formatting guidelines:

- Outlines should be 1 page long (no more than 600 words) — no exceptions.
- They should include standard memo headers (To, From, Re:).

 Content: Outlines should contain the same sections as the Strategic Options Memo.

 Content/Structure

Strategic Options Memos and Outlines should include the following sections:

- **Issue:** What is the policy question to be answered? A one-sentence summary of the issue facing the policymaker.

- **Relevant National Interests:** Why do we care? What specific national interests of the U.S. are engaged by the issue? How much do we care? What do we care about more than other things we care about? From the perspective of American national interests, what matters more than other things that matter? Vital interests are “conditions that are strictly necessary to safeguard and enhance Americans’ survival and wellbeing in a free and secure nation.” See “Commission on America’s National Interests” (1st assignment reading). Using that framework, identify national interests impacted by specific challenges in the case. Sometimes useful to array using threat/opportunity framework.

- **Analysis:** What is the shape of the challenge? Analysis of the dynamics of the challenge with special attention to drivers and trend lines. Not a history lesson. Instead, key facts, causal factors driving trends that the busy decision maker may not recall vividly but that are essential in examining potential interventions to advance U.S. interests.

- **Operational Objectives [optional]:** Given interests, threats, opportunities, and the capabilities that can mobilized, in many cases, it is useful to summarize one or two operational, achievable objectives to advance national interests identified above in addressing challenge. What should we try to achieve now by intervening in current dynamics? Avoid vague or tangential goals.

- **Strategic Options:** What are the major strategic alternative courses of action? What are the pros and cons of each? Identify at least 3 distinct strategies that could be implemented to achieve the operational objectives and advance the national interests identified earlier in the memo. Each option should have a brief label that captures its essence. Assess pros and cons of each. Each option should be realistic, feasible, and presented in its strongest form. Do not
write the decision maker a “sandwich memo” in which two unreasonable options are presented, making the third option (that you recommend) the only feasible choice.

- **Recommendation**: A concise (generally one-sentence) summary of the option you recommend and why you recommend it.

- **Implementation**: Brief summary of initial steps policymaker would take to implement the option recommended, for example, consultations with allies, engagement of Congress, etc. Where feasible, include indicators of effectiveness or early clues about whether the strategy is succeeding, or needs to be adapted or changed.

As you write each of the above sections of your outline, you should keep the following in mind:

1. **Incentive**: Let the decision maker know why he or she should address this issue now. Why is it an important issue? Why can’t it wait?

2. **Brevity**: Be brief. Don’t tell the decision maker what he or she already knows. Put yourself in the decision maker’s place: what facts and analytic insights are essential for making a sound decision? Avoid overly elaborate analysis and the temptation to show off technical skills.

3. **Bias**: You often cannot avoid having a personal point of view. But you can avoid slanting the assumptions or options.

4. **Leaks**: Memos often receive wider distribution than their authors intend. While frankness is important, consider how your memo would look on the front pages of national and/or local newspapers.

5. **Big Picture**: How does the issue relate to other issues under consideration? Will the consequences of alternative courses of action be importantly affected by developments on other fronts? Keep in mind the “Big Picture” to avoid getting bogged down in irrelevant or trivial details. Place the immediate issue in a longer-term time frame.

6. **The Boss and the Assignment**: Pay close attention throughout to the decision maker’s agenda, expectations and concerns. Answer the question asked. Make certain that you understand your assignment; seek clarifications when necessary.

7. **Tough Issues**: One of the key purposes of memo writing is to illuminate and clarify the toughest issues and address them head on. Sidestepping or blurring these issues will lead to unpleasant surprises for the decision maker—and in turn for the memo writer.

8. **Uncertainties**: Give your best estimate of probabilities. Use numbers, metaphors, or whatever best communicates your judgment about likelihoods. Instead of saying that an outcome will “probably” occur, give your best guess—do you mean “better than even,” “two out of three chance,” or “95%?” It may feel uncomfortable to attach precise estimates, but it is worse to bury your best judgment in ambiguities. It is important to be clear that these are your own best estimates based on available information.
9. **Leave the politics out, for the most part.** As a policy advisor or expert, you will be asked for your best insights into what will work in the interests of the United States or your country. Rarely will your boss seek your political advice. Unless asked, don’t offer. Conversations about how to manage this politically (what are the tactics of Congressional relations, etc.) will be handled later and, often, by a different set of people. Of course, your analysis should not be politically naïve.