
Format of Formal Memorandum

(letterhead stationery)

Date of Signature

MEMORANDUM FOR Addressee's Duty Position or Name and Address

Subject: Indicate the subject matter briefly

1. The first paragraph contains information on the occasion that caused this memo; e.g., meeting, conference, conversation, people, etc. (the reference)
2. Background and discussion (when necessary for clarity)
3. Conclusions reached and decisions made
 - a.
 - (1)
 - (2)
 - b.
4. Staff agencies responsible for specific action (if applicable)

Name, Rank, Service
Position

Example 1 of Formal Memorandum

(letterhead stationery)

23 March 1997

MEMORANDUM FOR ASSTCDR, 23D ARMED DIV

SUBJECT: Preparations for USAREUR Artillery Competition.

1. Summary. Preparations are on track for the competition set for 19 Aug at Grafenwoehr. I have chosen primary and backup sections to represent the battalion. Maintenance and gunnery training are in full swing. Our only major problem is acquiring more 155 mm ammunition for direct fire practice.
2. Actions Completed.
 - a. Designation of Sections. Based on their performance in the DivArty "Top Gun" Competition in Dec, I chose SSG Alfred Jones' section (Btry A) as the primary section and SSG Johnny Rodriguez's section (Btry D) as the backup. Their soldiers are not due to PCS until FY 1998.
 - b. Planning Meeting. The section chiefs, their platoon leaders, chiefs of firing battery, their platoon leaders, battery commanders, and the S3 met last Tuesday to prepare a draft Preparation Checklist and Milestone Calendar.
 - c. Preparation Checklist and Milestone Calendar. After the CSM and XO reviewed them, I approved the checklist (Encl 1) and calendar (Encl 2). The S3 sent copies to DivArty S3, Bde S3, and Div FSE.
 - d. Maintenance and Gunnery Training. This week, both sections completed Phase I of the training schedule. They were both particularly sharp on crew drill, emergency displacements, and ammunition handling.
3. Actions To Be Completed.
 - a. Training. We will continue to follow the checklist and the calendar to the letter. They are very sound, and I'm confident they'll fully prepare the sections to bring home the trophy. The supplemental training during our next Grafenwoehr training density will sharpen the section's skills.
 - b. Maintenance Inspections. Division MAIT will conduct a courtesy inspection on 25 Apr. The DS fire control repair mechanic will do this on 26 Apr. They will give us a final check in July, two weeks before the competition.
4. Significant Problems. The DivArty S4 and my Ammo Officer are coordinating with the Div Ammunition Officer for 100 extra 155 HE rounds for direct fire training. I have talked to him, too, but he hasn't yet received word back from the Grafenwoehr ASP. I'll keep you informed of our progress.
5. Point of Contact. MAJ Kilhesad, S3, 333-999

2 Encls
1. Schedule
2. Milestone Calendar

BOBA. TILLS
LTC, FA
Commanding

Example 2 of a Formal Memorandum

(letterhead stationery)

5216
Ser943D/345507
10 Jan 97

Memorandum for the Deputy Chief of Naval Operations (OP-XX)

Subj: Professional Preparation of the Memorandum-for Information Memorandum

Ref: (a) CNO Supplement to DON Correspondence Manual
(b) HQMC Supplement to DON Correspondence Manual

1. The memorandum-for is a very formal memorandum. Its normal use is to communicate with very senior officials such as the Secretary of Defense, the Secretary of the Navy, the Chief of Naval Operations, one of the Assistant Secretaries or Deputy Chiefs, or an Executive Assistant (EA) for any one of these officials.
2. Take great care in the preparation of the memoranda-for. These documents have high visibility and require thorough staffing and tactful expression. Make sure each of them has the following:
 - a subject line that best describes the memo's purpose;
 - headings, if useful;
 - brevity, always—normally keep the memorandum-for to *one page*.
3. If you use tabs, be sure not to let those tabs substitute for good staffing. Do your best to pull the relevant information out of the references and weave it into your memorandum rather than asking a senior official to plow through the tabbed material.
4. Protocol is important. List the addresses in the established order of precedence.
5. Prepare the memorandum-for on letterhead stationery. Because it lacks a "From" line, show the signer's title below the typed name.
6. Various offices have issued additional guidance on preparing this document. For example, the Secretary of Defense asked recently that "ACTION MEMORANDUM" or "INFORMATION MEMORANDUM" be placed at the end of the subject line of each memorandum-for, and OP-NAV offices have generally followed suit.

J. Memorandum
Deputy Chief of Naval Operations

Memorandum for Record (MFR)

Do you want to ensure that some key information is recorded, but are you afraid that because of the informal circumstances in which it came up, it won't be? Then pen a memorandum for the record (memo for record, MR, or MFR).

The information might be from a meeting, a telephone conversation, or an informal discussion held on a staff. You can use the memo for record to record an agreement among parties at a conference, or to record decisions made at decision briefing. The memo for record resembles the minutes at a meeting in some respects—and can be used for minutes—but is more the gist of the meeting than a formal set of minutes. It is an in-house document (one meant for use within the unit or command), but it can also be used to pass information to other staff members on an informal basis. The heading does not show the addressee's duty position or name and address. The memo for record is written on plain paper.

On a ship, in a squadron, or in a field unit, the memo for record can also be effective. Use it to document an informal investigation and its results or an important counseling session conducted with a subordinate along with the factors that led to the counseling. Another common use of memos for record is to document information from a phone call or from the informal discussion that an investigator conducts in the process of a legal investigation.

Usually you file a memo for record for future reference, but you can route it to your staff if everyone needs to know the information it contains. Staff officers can forward memos for record up the chain to keep seniors informed of what is happening down below.

Whatever you use it for, keep this memo informal. It is an in-house document, to help keep track of business. Do remember to sign and date it, but always keep it easy to use.

Format of Memorandum for Record

Date of Signature

MEMORANDUM FOR RECORD

Subject:

1. Xxx xxx xxxxxx xxx xxxxxxxxxxxxxx xxx xxxxxx xxx xxx xxx xxxxxx xxx xxx xxx xxxxxx
xxxxxxxxxxxx
2. Xxx xxxxxx xxx xxx xxxxxx xxx xxxxxxxxxxx xxx xxxxxx xxx xxxxxxxxxxx xxx xxx xxx
xxxxx
3. Xxx xxx xxxxxx xxx xxx xxxxxx xxx xxx xxx xxx xxx xxx xxx xxx xxx xxx xxx xxx xxx
xxx

Name, Rank, Service
Position

Example 1 of Memorandum for Record

23 August 1997

MEMORANDUM FOR RECORD

Subject: Command Procedure Manual Update

1. All Company Commanders are to review the attached documents. These procedures are being implemented into the Command Procedure Manual.
2. These procedures are effective immediately.

Jerome H. Jones, Capt, USA
Executive Officer

Enclosures (2)

Example 2 of Memorandum for Record

11 August 1997

MEMORANDUM FOR RECORD

Subj: Responsibility for Change of Postal Safe
Combinations on USS Overhaul (FFG999)

On 10 August 1997, I discussed this investigation with PCC Gray of the COMCENTGULF Postal Assist Team. I asked PCC Gray specifically what the responsibility of the postal official in this case would have been. He said that a postal officer must oversee the entire postal operation of the command. Therefore, ENS Brown did have a duty to make sure safe combinations were changed. However, he also pointed out that ENS Brown's responsibility was oversight only, and that the primary responsibility for changing the combinations remained that of the Custodian of Postal Effects (COPE) aboard USS OVERHAUL, that is, PC2 White.

J.R. Black, USNR
Investigation Officer

Example 3 of Memorandum for Record

15 May 97

MEMORANDUM FOR RECORD

Subj: Target Anchors and Salvo Retrievers

1. I have been asked the following questions by OP-88Z and by Mr. A. C. E. Shooter of SASC staff:

a. What are the quantity and funding profile for target anchors and salvo retrievers for FY 96 and prior through FY 99?

b. What would be the cost of 300 target anchors in FY 99?

2. I provided the following information:

	<u>FY 96 & Prior</u>	<u>FY 97</u>	<u>FY 98</u>	<u>FY 99</u>
Target Anchors	150/\$3.0M	300/\$5.4M	400/\$7M	50/\$.08M
Salvo Retrievers	250/\$15M	400/\$23M	550/\$32M	800/\$46M

The cost of 300 target anchors in FY 99 would be \$4.8 million. The inventory objective for target anchors remains 1,500; the inventory objective for salvo retrievers is 3,000.

3. This inquiry is probably the first of many on this subject. We should be consistent in our answers.

E. Preble
Director, Targeting Division

Copy to:
OP-OX
OP-OXA
OP-OX

Exercise 23

Using the format and the model, write a brief Memorandum for Record regarding a meeting, conference, or problem that needs to be documented. Use the checklist style, and write in sentences or condensed paragraphs rather than in phrases. When you are finished with your memo, use the following questions to review it for clarity and terseness. (If a situation calls for a Formal Memorandum, use the format and the model given to draft one. Write the finished version on letterhead.)

1. Does the first paragraph contain the topic and the main idea of your memorandum?
2. Are the words, sentences, and paragraphs short?
3. Have you eliminated unnecessary words?
4. Have you used transitional and connective words?
5. Have you checked for correct capitalization and punctuation?

Task 1: Conference Arrangements: Sample



When an outside organization wishes to hold an event using Base facilities, approval must be given by the Base Commander (B Comd). Following approval, an Office of Primary Interest (OPI) is appointed by either the Base Commander or the Base Administration Officer (B Adm O). The OPI serves as an intermediary (liaison) between the organization and the military. The OPI makes arrangements on behalf of the organization, sending memos to the various military sections that will play a role in the planning of the event.

Instructions:

1. Read the three memos which appear on the following pages. These memos were sent to various sections in the course of planning a conference.
2. Working with a partner, identify the details required on page 54.

Memo #1

*B PAFF O = Base Public Affairs Office

MEMORANDUM

1000-1

20 May 94

Accn O

CONFERENCE OF CANADIAN ASSOCIATION OF URBANISTS

Ref: Memo B Comd 18 May 94 (NOTAL)

1. The Base Commander has authorized the Canadian Association of Urbanists to use Base facilities for their 5th annual conference to be held on 27 Sep 94.
2. There will be 120 members attending. Use of the theatre has been requested from 0900 hrs to 1600 hrs.
3. A response by 30 May 94 confirming availability of the theatre would be appreciated.
4. The undersigned is functioning as OPI for this event.

N.J. Lacite
Capt
B PAFF O

Task 1: Cont'd

Memo #2

MEMORANDUM

1000-2

20 May 94

B Food Svcs O

CONFERENCE OF CANADIAN ASSOCIATION OF URBANISTS

Ref: Memo B Comd 18 May 94 NOTAL

1. The Canadian Association of Urbanists will be holding its 5th annual conference at the Base on 27 Sept 94. A request to use Base facilities was approved by the Base Commander on 18 May 94.
2. 120 members from across Canada will be attending this one-day conference.
3. Conference organizers have requested a moderately-priced light lunch. Menu suggestions would be appreciated along with cost estimates.
4. In addition, a dining room will be required for the lunch. Could the MacIntyre Room in the Officers' Mess be reserved for this purpose from 1200 hrs to 1300 hrs?
5. Your attention to these details with a response by 30 May would be appreciated.
6. The undersigned is functioning as OPI for this event.

N.J. Lacite
Capt
B PAFF O

Task 1: Cont'd

Memo #3

MEMORANDUM

1000-3

20 May 94

PMC Officers' Mess

CONFERENCE OF CANADIAN ASSOCIATION OF URBANISTS

Ref: Memo B Comd 18 May 94 NOTAL

1. The Base Commander has authorized the Canadian Association of Urbanists to hold their 5th annual conference at CFB Greenville.
2. This one-day conference, involving 120 participants, will be held on 27 Sept 94.
3. The Association has requested the use of the MacIntyre Room in the Officers' Mess for the purpose of serving a light lunch to all 120 participants from 1200 hrs to 1300 hrs. There is also interest in using the Harrington Room for a Happy Hour from 1630 hrs to 1730 hrs.
4. I understand that the Harrington Room may already have been booked from 1700 hrs to 1800 hrs by another group. If such a conflict exists, perhaps one of the groups could use another locale, if available.
5. Please provide my office with confirmation of the availability (or not) of either room at the specified times.
6. A response by 30 May 94 would be appreciated.
7. The undersigned is functioning as OPI for this event.

N.J. Lacite
Capt
B PAFF O