<u>Action Memos, Info Memos, RAHs—General Guidelines</u>

Guidelines for Action and Information memos and RAHs: These are guidelines, not a formula to be followed exactly in all cases. If you have specific questions about a product you are asked to prepare, ask your leadership chain.

Action Memos: When do I use them?

Action memos ask for a decision from the principal. The memo needs to be clear in the first line what it is asking from the principal and what the implications are if the Principal <u>does or does not</u> take the recommended course of action. It should explain <u>why</u> the principal should take the recommended decision, articulate any <u>opposing views</u> that have not been able to be addressed in the coordination process, and explain next steps, if appropriate. Action memos <u>must be coordinated</u> (see AO handbook for levels of coordination required for particular principals and other coordination rules. If you still have questions, ask your leadership chain). The recommendation in an action memo can be very specific (e.g., Sign memo to Congressman XXX at TAB B) or the memo ask for general approval of a course of action being proposed. They are almost always no longer than 2-3 pages and can contain attachments, as appropriate.

Info Memos: When do I use them?

Information memos provide information to a principal but <u>do not ask for a decision or guidance</u>. They can be either self-generated (an office believes a principal would benefit for more information on a topic) or they are specifically tasked by a principal. They should still be clear up front what topics are addressing and generally provide the appropriate level of detail for the particular the principal (e.g. more for a DASD, less for SD). They need to be appropriately coordinated both within Policy and outside as appropriate. Sometimes a principal will write comments or additional questions on the memo. This is <u>not</u> a good tool for time sensitive information.

RAHs: When do I use them?

Read-aheads are prepared for Principals who are attending a meeting, internally within Policy, with OSD or DoD principals, the interagency (e.g. PCs and DCs) or foreign officials. At the ASD level and above, there will almost NEVER be a meeting that does not require a formal RAH. The format and specific guidance can be found in the Policy templates.

The purpose of a RAH is to provide the Principal with the proposed objectives of the meeting, items to raise (talking points), and necessary background/issues and bureaucratic state of play (which includes positions of key stakeholders, including items the other side might raise).

RAHs are used to inform and prepare the principal. They are generally not tools of decision or policy making, though policy can be made or advanced in the course of meetings.

You will write the most useful RAH if you have a good understanding of how the meeting will unfold, the objectives of both sides, and the role of the principal for whom you are writing the RAH. Also, remember that the higher the principal, IN GENERAL the less detailed their knowledge will be on the specific issue. This means you need to find the balance between telling the principal what they need to know for the meeting and not overloading them with unnecessary detail. It is also important to know your Principal—if he/she likes additional background material, put this at TABs. Also, a principal may know less of the specific details of an issue, they will, in almost all cases, know and understand more about the broad context in which this meeting is taking place than you will. This is one of the reasons that you need to consult with other offices (regional and functional) that have equities in the meeting. Doing this will give you the fullest picture possible of the context, objectives, constraints, past history and other relevant issues with regard to the meeting.