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Plain Language 101: Communications Tune Up Webinar series

BLAKE TRAVIS: Hello, everyone. And welcome to the Communications Tune Up webinar series part of the MAXIMUS webinar series. Thank you for attending. My name is Blake Travis. Today's webinar is Plain Language 101, Making Sense of Complex Content, the first in our series.

Some quick housekeeping, if you have any questions, please type them directly into the chat box at the bottom right of your screen, and we'll answer them at the end of the presentation. We'll also be sending the slides and a link to the recording to all attendees after the webinar.

Our presenter today is Joan Winchester, Senior Manager, MAXIMUS Center for Health Literacy. Joan is a writer and researcher at the Center. She reviews, writes and edits web and print content specializing in writing in plain language. She leads the center's English Language Research Team developing and conducting usability testing and analyzing and reporting findings. Also, conducts large and small group training and workshops on plain language and field testing.

Before joining the center, Joan was a reading specialist with more than 30 years of experience in the city of Alexandria, Virginia public schools. She holds a BA in American Studies and a Masters of Education degree in reading from the University of Delaware. And now I'll turn it over to Joan.

JOAN WINCHESTER: Thank you, Blake. Hello, everyone, and welcome to Plain Language 101. Let's start by looking at this passage. Don't try to read the whole thing, just skim over it.

Got it? You may have figured out that this is an explanation of the game of cricket. So why am I showing you an article about cricket? Because this is an experience that many of our readers have, including the elderly, those with limited literacy, and those who are unfamiliar with the content of our messages. They can read all of the words, but they can't figure out what it's all about. And by the end of the passage, they have a vague idea of the subject matter, but they really haven't understood it.

Why? Because it's complicated. It has new concepts, it has unfamiliar words, and because reading and comprehension are two different things. Being able to read the words does not mean you understood the message. Some of you may have experienced that with this passage.

Reading is decoding the words. Figuring out what word the letters form, but comprehension is understanding the message. So many people won't comprehend this very well even if they can read all of the words.

Let's see why. These are some barriers to understanding that passage even though you could read or decode every word. There were many unfamiliar words in it. There were unfamiliar concepts in it. There were long sentences, long paragraphs. In fact, it was one long paragraph. And there were too many messages. So many readers would have to work pretty hard to comprehend that passage even though they can read it.

If you're a good reader, you used some skills to work at comprehending. And this is because good readers use context clues to ferret out meaning from difficult material, but those are skills that not all readers have. Let's look at what you probably did to make sense of this complicated material. First of all, you probably mentally divided it into meaningful, manageable chunks. As you can see, that in itself goes a long way toward making something easier to read.

Next, you recognized certain familiar words. The words in red: pitch and bowler and batman and throws and hitting and fields and run. And those led you to the conclusion that this was about a sport. You made an inference, which is a comprehension skill that not everyone has.

And, finally, you used the unfamiliar words, the ones in green, stumped and bails and creases and sundries and byes and googly. And even if you never heard of them before, you had some kind of background cultural knowledge, maybe of England or India or South Africa or Australia or even of sports in general to make an educated guess that this was about the game of cricket. Even though you could read every word, though, you had to do some work to comprehend, and you're probably a good reader.

Our job as writers, though, is to overcome barriers or at least not put up more so that our readers don't have to work that hard to get our messages, and that means we must write in plain language.

Plain language is writing that addresses the reader directly. It's clear, concise, and friendly. It improves access to information for all readers, from those with limited literacy, to the highly literate, because material in plain language is easier to read and understand. With plain language, you write so that when you read the material out loud, it sounds conversational and direct. It's not dumbing down; it's clearing up.

These are some things that we've learned over the years about the barriers to readability. First, even good readers can only absorb a few messages at a time without experiencing information overload, so give a few messages at a time. Second, people who read well aren't frustrated when something is too easy, but those with limited or below average literacy levels are frustrated when something is hard. So target the reading level so that everyone can understand. And, finally, there's a learning curve for everything, and people are at varying points on the curve depending on their experience and their background. It's hard to understand the content if the culture and the words are completely unfamiliar. So consider your readers' experience, culture, and knowledge and write to your target audience.

So can't we just deal with all of this by using readability software or a formula to write to a specific grade level? While making print materials and web content easy to read and comprehend is not as simple as just applying or checking a readability formula or software. That cricket article, for example, comes out of a fifth grade level using a formula, and that's because of how the formulas work. You count syllables, words, sentences and the like applying a mathematical formula to determine a grade level or to rank the material as easy or hard.

Software and formulas can be useful in two ways. Since they often are accurate when flagging something that is very difficult to read, you can do a readability check to make the case that the material needs a plain language rewrite. And I sometimes use them after my plain language rewrite to compare it with the first reading level to see if I've brought it down.

This, for example, comes out at the third grade reading level using a readability formula. You fooled the formula because it has short sentences and some one-syllable words. Let's read it.

A third grader would find this very difficult to read, because not all short words and sentences are alike. For just one example, feign and fake are both one-syllable words beginning with "f," yet "fake" is much easier to read and comprehend than "feign" simply because it's more likely to be in a person's speaking vocabulary.

Most people have four sets of vocabulary: listening, speaking, writing, and reading. And if a word is in your speaking vocabulary, there's a better chance that you can read it. If it's unfamiliar, no matter how short it is, it may be hard or impossible for a reader to comprehend, even if they can decode the letters.

So readability formulas are kind of like spell check on your computer. They're sometimes useful, but they're far from infallible. Machines can't think. The formula can't take into account all of the things that go into something making something more or less comprehensible; or, as in this case, making something right, but you can, especially, if you're a good reader. You were probably able to translate this in your head immediately because of the things that good readers

do to make meaning. But just as this might fool spell check, a readability formula or software can be fooled.

In fact, a recent study at North Carolina State University showed that formula assessments at readability were less than 49 percent accurate when compared with assessments of students actually reading the material aloud and someone assessing whether they can read it, whether they understood it. So that means readability formulas are only accurate about half the time.

So what can we do? Again, we can write in plain language. On the right is a plain language rewrite of the eagle paragraph. Have you lost the poetry and some of the descriptive words? Yes, but that's okay, because our aim here is to write for understanding. To make sense of complicated material for the reader, we must simplify. You can see that with plain language writing, sometimes you actually need a longer word to make it easier. I substituted "canyon" for "chasm," "indifference" for "apathy," and "kingdom" for "realm." That's because many more people know "kingdom" than know "realm." And other times shorter words are better, but because they're more familiar. I substituted "stranger" for "alien" and "blue" for "azure" and "old" for "hoary." And as we said before, sometimes one-syllable word is harder than another, as with "feign" and "fake." And sometimes the sentence has to be longer to make better sense. Short, choppy sentences can actually be harder to read. Another example of why readability formulas aren't the answer.

So now we'll talk about how to get from the paragraph on the left to the paragraph on the right. There are five steps to writing in plain language, and you'll notice, as we look at these steps, that the actual writing doesn't begin until steps three, and that's because a big part of what you do to make materials easy to read and understand happens before you write.

Step one, is to identify your purpose, your audience, and your messages. Step two, is to arrange your key messages in order of importance. Step three, is to write in plain language. Step four, is to add organizational aids. And, finally, step five is to design the format.

Let's look at these steps one at a time. The first step to writing in plain language is to know your purpose, to know your audience, and your key messages. To get out your purpose, you'll want to ask yourself, "What is your goal?" You might be working with a group or a team, and you might want to sit around and talk about that: "What are we trying to do here?" "Why are we writing this?" This will also help determine what form the material will take: Will it be a brochure or a letter? To identify your audience, you'll ask yourself, "Who are my readers?" And, finally, to recognize what your main messages are, you'll want to figure out what are the main points.

When you're thinking about purpose, you'll ask yourself: "What is my goal?" "What do I want to communicate to the readers?" "What am I asking the readers to learn or do?" Your answers to these questions will guide your writing, whether you have one or all of these purposes or a different one altogether. It's where you have to start when you're writing in plain language.

Once you're sure where your aims are, you'll ask yourself: "Who is my audience?" "Who are my intended readers?" "What do I know about their literacy levels?" "What do I know about their knowledge or their background on the topic?"

We do and should write differently for different audiences. For example, if you're a lawyer writing a legal document for a judge, surely, you will write it differently than if you're writing, say, a HIPAA privacy notice for a doctor's office. And if your audience is a wide one, it's important to make sure that the writing will be accessible to a wide range of readers. That means, making it clear for even those who struggle with reading, recognizing words, and with comprehension, understanding the message. We want to be sure that our content is accessible to everyone.

Once your purpose or purposes and your audience are firmly in your mind's eye, it's time to consider the messages, again, before you begin to write. If you're rewriting an existing

document, you want to analyze it to find the key messages. And if you're creating a new document, you want to decide what key messages you want to include. Make a list of the key messages that you want the material to convey. And then, after you've considered your purpose, your audience, and your messages, you may be asking, "Now can I start writing the actual content?" The answer is, not yet. Because next you have to figure out your answers to this question: What is your most important message? And you may also want to pare down or combine messages on your original list so you have just three or four key messages. Remember, too many messages can be confusing to the reader.

When you're consolidating, think of it kind of like packing for a trip. You know, we start out -- we put in everything we'd like to have with us on the trip, and then we realize that our bag is too heavy to carry, so we take out half the stuff, and we have plenty.

And last, you'll want to reorganize or organize your messages, putting the most important at the beginning, followed by the supporting messages. Now we're ready to begin writing in plain language.

So let's talk about how to do that. As I said earlier, plain language addresses the reader directly, it's clear, it's concise, and it's friendly. And plain language improves access to information for all readers, from those with limited literacy to the highly literate, because it's easier to read and understand. With plain language, the material sounds conversational and direct when it's read out loud. So to be able to write in plain language, we need to know the basic elements of plain language.

So here they are: Active voice, friendly tone, short paragraphs, simple sentences, and familiar words. Let's look at them one at a time.

The first one is active voice. So here's a sentence: An order for your lab work will be placed for you at the out-patient lab. That's in passive voice. The subject, the person doing the action, either comes after the verb, the action, or isn't there at all. So the subject is passively receiving the action. The subject here is not named, but it's implied. Sometimes in passive voice the subject is deliberately omitted to avoid attribution as in the famous sentence, "Mistakes were men" --"were made." But we don't know who is placing this order.

So in the second sentence, we've put it in active voice. We've placed the subject "we" first, followed by the verb, in that order. "We will order." Who is doing what? That's what active voice lets you know right away.

What does the simple act of changing from passive to active voice do for the reader? Well, it tells the reader who's doing the action. It simplifies the sentence. It makes the action clearer. And notice in this case, the sentence is shorter, which also makes it easier to read. That's not to say that passive voice is always wrong, but it's usually not necessary to write that way. The simple act of changing the voice can go a long way towards making complex material easier to read.

The second element of plain language is friendly tone. Readability formulas, by the way, don't take either voice or tone into account, and they're very important in making things easier to understand.

Here's an example. The first sentence is accurate: "Failure to follow your prescribed exercise regimen may result in slower recovery." But this sentence is also accurate, and it's much easier to read, mainly, because it's much friendlier and conversational.

Why is the tone of the second sentence friendlier? Well, first of all, it's shorter, there are fewer three- and four-syllable words, it directly addresses the reader, and it replaces a fairly formal phrase, "exercise regimen" with the friendly and easy "exercise" or easier. And, finally, it replaces a negative instruction with a positive one. It takes away "failure and slower recovery" and substitutes "feel better sooner." When giving instructions, you'll get better compliance if you tell people exactly what you want them to do rather than what you don't want them to do.

The third and fourth elements of plain language have to do with length. This is what is at the core of most readability formulas: shorter words, shorter sentences, shorter paragraphs. And it is true that shorter is usually better for readability and comprehension, but not always. Remember with the cricket article when I just broke it in to short paragraphs, it quickly made it easier to read.

So let's look at this paragraph and its revision. This was in a letter sent to patients before surgical procedure. Take a minute to read it to yourself. Now, let's look at the plain language revision.

In field research, we sit down with individuals and materials to see if the materials are easy or hard to understand. And one thing we often have participants do is read a paragraph, and then tell us in their own words what it means. That will tell you right away whether they understood it. But participants often say that it's incredibly frustrating to read all the words in a paragraph, get to the end, and have completely lost the gist of what the paragraph was saying at the beginning. As one field participant said, "I get lost in the words." That's exactly what happens with small, confusing paragraphs.

Notice that the second version includes both of the first two plain language elements: active voice and friendly tone. It's been rewritten to say exactly the same thing in fewer words: 32 words instead of 56. So we took a complicated paragraph and made sense of it by shortening it, while still saying the same thing simply by taking out all of the unnecessary words.

One way to shorten a paragraph is to shorten the sentences in it. Here we simply extracted the main message from the first sentence and we cut out, again, all of the unnecessary words. And notice that this will make it a little friendlier too.

We left out the justification, which was kind of a misplaced modifier and sounded kind of stiff to carry on this work satisfactorily. That was totally unnecessary. We also took out "complete cooperation," because why bother to introduce the concept of partial cooperation by implication here. Cooperation is good enough. It's like saying, "the most unique." "Unique" is one of a kind. Cooperation is cooperation. We don't want to introduce the idea of partial or intermittent cooperation. We want cooperation. With plain language, you tell them directly what you want, and you get rid of unnecessary words.

Speaking of words, the fifth element of writing in plain language is, of course, familiar words. As you can see with this rewrite, a one-syllable word is often easier to read than a three-syllable word: sodium versus salt. And two shorter words are easier than one four-syllable word: blood pressure versus hypertension. And, of course, substituting the familiar for the technical or medical or legal is often a good idea. But sometimes you want the reader to learn a technical term.

I was reading a study the other day that the National Academy of Sciences did that showed that 42 percent of people surveyed who were going online to purchase health insurance could not explain or describe what a deductible was; and, yet, we can't throw out that word if we're talking about health insurance. So what we have to do here is figure out a way to explain it. We better explain it if we want people to understand it.

So here's a way to do that: You define it in context, right there, as close as you can to the word. Cut down on salt if you have hypertension/high blood pressure. That way you've explained it in a way that's easy to understand, and you've given them the word so that the next time they encounter it, they might recognize it.

So let's look at this second paragraph from our pair of paragraphs, and let's see if it meets the five elements of plain language. Is it in active voice? Yes. Does it have a friendly tone? Yes. Is the paragraph brief? Yes, it's six lines instead of ten. Are the sentences mostly simple sentences? Yes, it's still three sentences, but each one is brief because we got rid of unnecessary words, and that semicolon is gone. And, finally, did we use familiar words? Yes, we removed or substituted unnecessary or unfamiliar or multi-syllable words. We substituted

"plan" for "carrier" and we omitted the unnecessary "different." We substituted "more" for "additional" and "also" for "in addition to," and we substituted "before" for "prior to" and "doctor" for "provider." Sometimes you'll want to use "provider" because you're talking about not just doctors but other healthcare providers. In that case, you might want to explain it. Put in parentheses, doctors, nurses, PAs, etcetera.

So now we're ready for the two final steps. Step four is to add organizational aids. Material written in plain language has organizational aids that help readers skim to look for information they need. Organizational aids include brief descriptive titles. They often include greetings and closings, headings, and question and answer format when that's appropriate. Organizational aids sometimes include making sections. And, of course, as we've already discussed, limiting the messages and putting the key messages first. Organizational aids include putting instruction in brief ordered steps, and often they include footers with contact information, for example.

Let's take a look now at one of these, the one about instruction. On the right in the letter before the plain language rewrite, the first three paragraphs are the introduction. You may qualify for assistance in paying your medical bills. First, we need some information so that we can determine whether we can help you with your bills. Please complete, all spaces must be filled, in addition, attach copies of the following documents.

If I were doing a rewrite of that in plain language, I would cut those three paragraphs to a brief introductory sentence or two. And then I would put the instructions into steps. I would put the steps in the order you're going to do them so people can check off each one that they've completed, and if they have to stop in the middle, when they come back, they know what they've already done.

I would number the steps, and I would leave out the specific instructions that really belong on the application itself, the one about filling in all spaces and using N/A or a dash. You can't expect people to go back to this letter when they're filling out the application. So now the instructions are brief, they're clear, they're numbered, they're one step at a time, and you may notice that each one begins with an action verb, and they're in the order that they must occur. Remember, our aim is to make complex material easy to understand, follow and take action, not to make people have to work to understand it.

So now we're ready for the last step. Step five, the fifth and final step, is to write -- is to writing in plain language is formatting. When we talk about design and formatting, we're talking about the way things look. We're talking about font and text size and white space and line length and navigational aids and images.

We're going to take a look here at formatting that adjusts font style, text size, white space, and line length for readability. Look at this sentence that's from our earlier paragraph. Now, it's written in plain language, but the formatting is still putting up a barrier for the readers.

In this one, the font is now a more readable, clear, Sans Serif font; Sans Serif, meaning, without the little feet that the Times New Roman font at the top has. Also, you may notice that the font color is even easier to read. That's because there's more of a contrast between the figures of the letters and the background. This is especially important when your audience includes older people.

Notice also that the text size is larger, and the line length is shorter. Remember lines that are too long can be confusing, and readers can forget the beginning by the time they get to the end. But lines that are too short, can break the reading rhythm and can result in awkward hyphenation or line breaks. I try to break my lines where there's a logical end to a word grouping that people will read; although, often I have to fight my computer to do that. About seven to 14 words per line is good, and, of course, it matters whether you're writing in columns or not.

The format should include navigational aids. Aids that help keep the content organized, and help readers to navigate. Notice that here we've added titles, we've added headings, we've

added a page number. Page numbers really help readers figure out where they are. We've added bullets and numbers. And the difference is that we put bullets where the order wasn't the crucial thing, and we put numbers where we want the reader to see these elements in a specific order. And then, finally, you'll notice that there's a contact footer.

Images can add interest and appeal. Just make sure your images are relevant and culturally appropriate to your intended audience. We often test images, as we did with this one, to find out which image appeals most to the target audience.

So now let's put it all together. Here's an example where we followed all the steps. We came up with this as a group of participants in a plain language training the trainers workshop. And, first, we considered our purpose. We wanted to reassure people who came to this rehabilitation center after surgery, RIO (sic), and then we considered the audience, the patient at the rehab center. Some of whom might be elderly or have limited literacy or be new to speaking English.

So after we figured out our purpose, then we figured out what messages we wanted to include and in what order. We wanted to explain why they might be more likely to fall, and what we're going to do to help prevent that. And then we used the plain language element of active voice, friendly tone, short paragraphs, simple sentences, and familiar words. We added specific navigational aids, a descriptive title, headings in bold, a Q, A format, and bullets as opposed to the numbers we used in the instructions. And each of our bullets answered the question, "Why is there is risk of falling?" You did this, you had this, you may be. And then, what are we going to do about it? We have special training, we check on you. And then, finally, we formatted it so the look made it easier to read. We might even want to add an appropriate image or an illustration. Notice that the bullets are parallel, and that it's divided into sections for easier reading.

I often keep someone in mind when I'm writing, a specific person. Recently I was working on a caregiver booklet, and I kept in mind a woman I know who cares for her elderly mother and her grandchildren and who has an eighth grade education. She doesn't have a lot of time, so one of the main things that I wanted to keep in mind with this caregiver booklet is that it needs to be short.

Of course, the best way to find out if something you've written is easy to read and understand is to test it. Have someone read it, and then ask them what it was about. Find out if they understood it. Have someone in the target audience read it. We always like to conduct either informal or formal usability testing with the intended audience. But if that's not possible, just having someone in the office read it is okay.

Remember, with plain language, you write so that when you read the material aloud, it sounds conversational, clear and direct. So read your materials out loud to hear where you can improve them. And never let something go out the door without finding out if people understand it.

I was thinking when I was reading some things on the Affordable Care Act, not to pick on them, but I was wondering if when they decided on bronze, silver and gold and platinum, they found out whether everybody understands that platinum is more expensive than gold.

The best way to improve your plain language skills is to practice. Practice rewriting existing materials into plain language and practice creating new materials in plain language. So that's it. Plain Language 101.

And before we go to questions, I just want to tell you that our conference, Plain Talk in Complex Times will be held in March of 2015 in Arlington, Virginia. And if you want to get the latest updates, you can send an email to plaintalkconf@MAXIMUS.com. And, finally, for copies of one or more of our manuals that the center has produced, you can send an email to us at healthliteracy@MAXIMUS.com.

So now, Blake, do we have time for questions?

BLAKE TRAVIS: We do have time for questions. Thank you, very much, Joan.

I'll remind everyone that if you have questions, if you can go ahead and type them into the chat box, the blog menu thing on the right side of your screen, and that's plain language, then we'll be able to read your questions and have Joan answer them.

Joan, I've got one already. It says, "In the past the Serif font was recommended as a help in tracking across the text. Is that no longer recommended?"

JOAN WINCHESTER: Well, it's interesting. There's been so much research on Serif versus Sans Serif, and it's kind of still inconclusive. Some studies show that what you just said is correct; that the Serif helped in the tracking. Other studies show that the look of the Sans Serif font is cleaner and easier for people to follow, especially, on screen, on a website.

But you have to be careful, especially if you are choosing a Sans Serif font, I know that, for example, in Arial, the Capital letter I and the lower case letter l look exactly alike. So in words like illustrate, they're a little harder to read in Arial. So the best -- I mean, there's been so many studies and it's still inconclusive, but it's leaning towards --the more recent studies are leaning towards everyone kind of moving over towards Sans Serif font, especially with the rise of people using the internet. I know that text messaging is in Sans Serif font on people's cellphones, so people are kind of used to it now.

BLAKE TRAVIS: So we have another question that I would wonder myself too. Is there a recommended font size? And I would add on, is there one that's too small or too big? It seems like a lot of the -- especially, online forms you go to, the fonts are so small that -- well, maybe my vision is bad, but it's hard to read.

JOAN WINCHESTER: Well, I think you hit the nail right on the head; that there is such a thing as too small and there's also such a thing as too large. Anything -- I mean, eight is getting pretty small. And, especially, for the aging reader, it gets more difficult to see because we are -- we tend to get far-sighted, as you all know, as we age. So we try to stay between 10 and 12. But, again, if you can go to the other end, and sometimes people do that on their computer screen, they increase the size of the font, you can get to the point where you've made it harder to read. And since different people are different in what they find comfortable, we always recommend when you're doing a website that you enable the thing that allows the reader to increase the font size or the user to increase the font size. And when we're writing print materials, we tend to stay within 10 to 12 and then make the headings a little larger and the title even larger.

BLAKE TRAVIS: What was the name of that report again that you mentioned about people understanding the word "deductible"?

JOAN WINCHESTER: Oh, it was a report that I -- I think it came out either this Monday or last Monday. It was by the National Academy of Sciences. And it was reported in the press that 42 percent of the people surveyed could not describe what a deductible was.

And I have to say, we find that a lot when we're doing usability testing. People don't know what a deductible is. They don't know what a deduction is when they're talking about their taxes. They don't know what a premium is. A lot of people when they see the word "premium," they think it means A-1, you know, like a steak. And, you know, that's a lingo. Every culture, including the healthcare culture, has jargon or a lingo. I mean, whether you're talking to teenagers or beatniks or health communicators, you have to be careful that when you use words that are specific to the culture, you explain them. I mean, when we were reading the article about cricket,

you know, I didn't know what a "bye" or a "sundry" was. But if they had put in an example or a description in parentheses, I would have learned.

BLAKE TRAVIS: Interesting. So another question, Joan: Is it better to use the numerical number for 1, 2, and any other number, or is it better to spell the word out, you know, one, o-n-e, two, t-w-o? What is the better way to get that across?

JOAN WINCHESTER: That's a great question. We follow the style guides, you know, of writing one through nine spelled out, and then 10 and above in numbers, just because I think they are a little easier to read that way. Of course, if it's the first word in the sentence, normally, you spell it out. And - - but like 152, is a lot easier to read as a number than as a word. But seven, it might be easier to read as a word, and some people do both. They will write seven and then put in parentheses the number 7, and I don't think that's really necessary.

In fact, when I was a reading specialist, some of my students thought that a parenthesis meant you were supposed to skip it. So I'm sometimes a little weary of putting too much. I know I recommended that you put definitions in parentheses after a difficult term or a technical term or a legal term or a medical term, but you don't want to put in unnecessary parentheses. That also interrupts the reader. So we usually just follow the normal style guide recommendations of one through nine is words and 10 on up as numbers.

BLAKE TRAVIS: Great. So when emphasizing specific words, do you suggest bolding, capitalizing, or underlining?

JOAN WINCHESTER: I'm so glad you asked that. Gosh, I forgot to talk about bolding. We use bold, as you can see in that RIO letter, to emphasize something. But I would never bold more than one line, and I would try to stay away from bolding too many complete lines. It just gets difficult for the eye, and it loses its punch, too. I mean, bold words should be like peppered, you know, you just sprinkle it in a little bit to give it some umph, but you don't want to overwhelm the material with bold.

The same with underline; although, we, of course, we don't use underline on a website because people will think it's a link.

But all caps, I really stay away from, because they are more difficult to read, especially, for people with limited literacy. All caps put up another barrier, and they shout at people.

BLAKE TRAVIS: True. So another question: How do you know if you have enough white space in your document?

JOAN WINCHESTER: Well, that's a question for our design person. But, basically, white space should allow the eye to rest. There should be, you know, a margin around the edges, and then there should be some places between the sections, and then, of course, between the words. And I think, again, I try not to put things into specific strict formulas, because it really depends on how the thing looks once it's all put together. So the way to see if you have enough white space is to test the material.

BLAKE TRAVIS: Good. Good advice. What are the recommended margins for a written letter?

JOAN WINCHESTER: Oh, gosh. I just go by what my computer does, which is, I guess, about an inch. But I do know this, that if you're -- I've worked on some letters that were being sent out by a program, and the program was under a court order to make their materials more

easier to read. And I found that the wide - - if the margin were too wide on the left and the right, it makes it harder to read, it makes the thing longer, it stretches it out too far on the page, and it makes the reader have to have his eye jump back and forth too quickly. So the margin should be wide enough that you can comfortably fit 10 to 14 words on the line.

BLAKE TRAVIS: Okay. We have quite a few more questions. Are you ready for some more?

JOAN WINCHESTER: Sure.

BLAKE TRAVIS: All right. What is your take on footnotes and endnotes?

JOAN WINCHESTER: Footnotes and even asterisks are tough for people. A lot of readers, once they have to jump away from where they are and look somewhere else and then go back to where they were, that's a task. I mean, that can be a barrier. And so I try to avoid them. I try to incorporate what was going to be, you know, asterisked or even a footnote, in the material; or, if it's going to interrupt the material, like, for instance, a legal citation, try to clump them all together at the end so that the reader isn't constantly having to leap around on the page. That just gets hard for people who are struggling or whose eyes aren't -- you know, elderly people with vision problems, it just adds another barrier. I try to avoid them as much as possible.

BLAKE TRAVIS: Sure. How about any best practices when working with multicultural customers?

JOAN WINCHESTER: Well, that's a great question. I mean, you know, if your audience is diverse, you want to make sure that what you're putting out there is not offensive to anybody, embraces everyone, and it is relevant to people that they will understand it. I try to stay away from idioms and things that some people might not be familiar with.
"Out-of-pocket," for example, worries me a lot. I remember when I first joined the corporate culture and left education, this woman that I was working with kept talking about being "out-of-pocket." And it took me a while to figure out she meant she was taking the day off. And so when you talk about out-of-pocket expenses, that's an idiom that not everyone knows. So you should either test it with your audience or explain it or try to leave it out. You know, money you have to pay. Although, we use those kinds of idiomatic expressions a lot without even realizing we're doing it.
So the best thing to do when you're trying to reach a multicultural audience is to make sure that what you write will reach everybody. And that doesn't mean making it completely bland and uninteresting. It just means being aware. As I said before, you know, having those people in your mind's eye as you're writing and thinking, you know, will this person understand this, will that person understand this.

BLAKE TRAVIS: In regards to images, what about cartoon clipart compared to actual photos, and does it really matter, or is there a formula to follow in which to use?

JOAN WINCHESTER: Well, I think that the main thing about illustrations and photos is that they should be relevant and appropriate and culturally sensitive. That RIO letter that we looked at at the end for the rehab center, the original of that had a cartoon that was meant to be funny of someone falling smack on their nose, and I felt that that cartoon was kind of off-putting, and so we took it out.

So what's one person's idea of humor might not be everyone's, so you just need to be careful. But I wouldn't say that, you know, never use a cartoon or always use photographs or never use photographs. I don't think, again, there's a hard and fast rule, nor should there be.

BLAKE TRAVIS: When you're doing a list, is it preferred, is it easier on the reader if the items are numbered or are just bullets fine?

JOAN WINCHESTER: I think it's easier if they're numbered. Because as I said before, you know, sometimes people can only do one or two things on the list, and then they've got to go away and, you know, pick the kids up or whatever, and then they've got to come back and do the rest. So if they're numbered, they can remember that they went through the first three steps. Also, if they're numbered, they will see that this isn't going to go on forever; that after you've done, you know, this number of things, you're done, because people are busy.

BLAKE TRAVIS: What is the best way to provide a URL online? Is it best to be embedded in the text, such as a word, or is it better to spell out the whole hyperlink?

JOAN WINCHESTER: That is a question – and we're going to be doing a webinar on accessibility, that is partly an accessibility question. Sometimes if it's just an embedded word, people don't know that it's a link. And sometimes people think something's a link because it's in a different color or something, and they'll be clicking and clicking on it and it isn't. So my answer is, however you do it, you want to make darn sure – and this is done through testing – that people recognize it as a link.

BLAKE TRAVIS: Are one sentence paragraphs acceptable?

JOAN WINCHESTER: Yes. I believe one sentence paragraphs can have a certain amount of dramatic effect or they can set something off as being really important. You know, be sure to mail your application by March 31st. That could be the whole paragraph, and it's important enough to be set off by itself.

BLAKE TRAVIS: And Eva Anderson, who is doing one of our webinars later on about design, actually commented about the font Serif versus Sans Serif. And she says, "Much of it is really determined by the experience the reader perceives they're having."

JOAN WINCHESTER: Right.

BLAKE TRAVIS: You might want to keep an eye out for Eva. She's going to have some good information in her webinar.

JOAN WINCHESTER: Right. And that's a really good point. And you know, that's another thing you can find out by watching people read something or watching people use a website. You can see whether they're struggling, even though they're saying this is easy, but they're clearly struggling. And you can see what kind of experience they're having and how they're perceiving this thing. I mean, I've done testing where someone has taken one look at a letter and saying, "Well, I'm not even going to try this." And they didn't' even delve into it to see whether it was difficult to read. It just looked hard.

BLAKE TRAVIS: One of our attendees asked, "Should we avoid semicolons?"

JOAN WINCHESTER: I think that in one of the principles of plain language being use simple, brief sentences when possible, I think that if you can break it smoothly into two sentences, you're giving the reader a chance to rest, and you're giving those people who aren't -- you know, who don't really notice semicolons, a chance to stop and think about the first part before they go on to the next part. So, yeah, I try to avoid them.

BLAKE TRAVIS: Okay. Well, that is all the questions we have. You can always follow up with us afterwards if you have additional questions you can send them to webinars@MAXIMUS.com, and I can wrap them to Joan or any of our other presenters to get you an answer to the question.

Our next webinar is on Friday, April 25th, and it's Quick and Easy Field Testing asking for affirmation correction and suggestions. You can register for any of our webinars at www.MAXIMUS.com/webinars. Or, like I said, if you have any questions or anything, you can send it to webinars@MAXIMUS.com.

And I would like to, again, thank you for attending; and, especially, thank Joan for a wonderful presentation. And I hope you all have a nice weekend. Thank you.

JOAN WINCHESTER: Thank you, Blake. Thank you, everyone.