Planning Easy-to-Read Materials

If you fail to plan, you plan to fail

Step 1: Decide the purpose of the material:

☐ What is the purpose of the material?

☐ How will the information be used?

☐ Who needs to know the information & why?

☐ When will they need to know it?

☐ What do you expect your audience to know and do?

Step 2: Identify your audience(s) (Goal is to learn how the audience thinks and feels about your topic or issue)

☐ Will you segment the audience into a select group or whole population?

☐ Who is the primary target audience?

☐ Who is the secondary target audience?
Describe what you know about your audience with regard to your topic:

- Demographic characteristics?
- How do they think and feel about the topic?
- What is their experience on the topic?
- What are the current beliefs, attitudes, & behaviors with regard to the topic?
- What’s the level of interest and perceived risk of being affected?
- What would your audience say are the potential benefits and barriers to the action(s) recommended?
- What would audience like to know more about?

How can you find out more about your audience?

Step 3: Decide what is essential content

- Research the content to become well versed in the current information about the topic.
- Develop a mind map of the material’s content (see written information on how to do a mind map)
Organize and prioritize the content:

- Compare the ideas on the mind map with what audience wants to know and might be willing to do

- What information on the mind map overlaps or shows differences with audience?

- Group together ideas on the mind map

- Identify “need to know” content and cross out ideas that don’t fit or are “nice to know”

- Create headings for major content areas

- Sequence the headings and develop key supporting points under each heading (Consider the audience and use of the information)

Step 4: Decide how to present the message and write a mock up

(Goal is to design a cognitive and affective framework for the key message so it’s compelling)

Design the core message (Placed at the beginning)

- Rethink focus of content from an action or behavioral change point of view

- Includes expected results based on audience beliefs / values

- Stress the benefits, address the barriers, and minimize risk and fear
Present key facts to make message credible

Blend what you want to tell with audience needs, wants, and readiness

Consider emotional appeal. What’s the appropriate tone? What’s the image being created?

Write the core message:

Reframe content headings from mind map exercise to blend what you want to say with audience point of view in words that make sense to them. Remember, these are the 3-5 key points that expand and support the core message (why, how, what to do, etc.)

<table>
<thead>
<tr>
<th>Mind map Headers</th>
<th>Reworded Headers</th>
<th>New Sequence #</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>4.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>5.</td>
<td></td>
</tr>
</tbody>
</table>

Sequence new headers from perspective of how audience views topic and how they will use information

Add small amounts of text to explain the key points

- Write the text as if you are explaining the points to the audience and write it, as they would talk it
- Use friendly, conversational tone with pronouns
- Choose familiar words and phrases (try to keep words at 1-2 syllables)
- Avoid abstract ideas and idioms
- Avoid jargon and technical language
- Avoid nouns made from verbs
Avoid long sentences (keep average length 15-20 words)
Use questions, lists, bullets, and numbered points to organize information
Use active instead of passive voice
Use examples to illustrate points
Use parallel construction
Introduce only one piece of information per sentence
Put subject and verb at beginning of sentence and in usual English order (S,V,O)
Context precedes new information

Step 5: Plan design and layout

☐ Consider how the material will be used when deciding on a format and design

☒ Who will need to be contacted early to help plan layout and design?

☒ Will the material stand-alone or be part of a larger information initiative?

☒ What will the final format look like? (pamphlet, one page fact sheet, poster, newsletter, booklet, palm card, magnet, etc.) Does the form fit the purpose / function?

☒ Where will you position the core message and key supporting points in the document?

☒ Choose font type and size that is clear and easy to read. Do not use all caps or italics

☒ Think visually! What kind of pictures will help the reader understand the text or even substitute for text?

☒ Consider length of the lines, justification of margins, and spacing

☒ What impact will marketing and distribution have on the size, shape, appearance, etc. of the material?
What are the budget and priorities for spending? (design, printing, paper quality, color, marketing, distribution, etc.)

Step 6: Testing, revision, and print

☐ Who will review and approve drafts during material development?

✦ Peers / other professionals (help with content):

✦ Managers / committees (final approval):

✦ Medical review:

✦ Legal review (protect organization):

✦ Marketing review:

✦ Target audience (field testing to provide essential feedback):