Guidelines for Selecting and Writing Easy-To-Read Materials

The 2003 National Assessment of Adult Literacy estimates that 93 million Americans (nearly half of all American adults) struggle with reading and understanding most information disseminated in this complex society. Misunderstanding of health information, specifically, greatly impacts a patient’s adherence with treatment and increases one’s risk for complications. This module discusses the use of plain language to help professionals clearly write understandable health education materials.

What is plain language?

Plain language is a way of organizing and presenting information so that it makes sense and is easy for everyone to read and understand. Plain language is not just a simplified style of writing. It involves more than replacing jargon and complex language with shorter sentences and familiar words. Plain language looks at the whole message from the reader’s point of view. Clear writing, effective organization, and an inviting appearance or presentation is key to creating readable, informative documents. Plain language starts with knowing your learner. The goals are to help the reader find, understand, and use the information to meet their needs. Check out some of the guidelines below for selecting or writing materials in plain language. Useful links: “Write it in Plain Language” “Plain Language Checklist”

Guidelines for Selecting and Writing Materials in Plain Language:

- Define Reader’s Wants and Needs
- Set Realistic Objectives to Determine Content
- Writing Style
- Organization of Materials
- Appearance and Design
Define Your Readers’ Wants and Needs

*If you fail to plan, you will plan to fail!*

Knowing your target audience’s characteristics and wants or needs is a key first step. Insights into how an audience’s experiences, thoughts, and feelings about a topic, as well as how they currently behave, will help you develop a piece of health material that will capture their interest and better inform. Some examples of important audience characteristics to consider include:

- Age, gender, culture
- Literacy levels (See *You Can’t Tell By Looking! Assessing the Ability to Read and Understand Health Information*)
- Stages of readiness to learn the information
- Experiences related to the topic
- Level of interest
- Perceived risk
- Thoughts and feelings about the topic
- What they want to know more about
- Current behavior with regard to the topic
- Benefits and barriers to taking actions

**Audience Research**

Researching your audience will help to ensure you are getting the intended message across. Audience research is key to defining your reader’s wants and needs. You may already know what information needs to be communicated, but do you know if your audience will actually read and understand the information you are providing?

Researching your audience should be part of planning for your materials. To learn about your audience’s wants and needs, conduct a focus group or use surveys and interviews. A focus group is a small group discussion guided by a trained leader. It is used to learn more about opinions on a designated topic, and then to guide future action. In this group, members are encouraged to talk openly about their opinions and respond to other members, as well as to questions posed by the leader.

To learn more about how to research your audience, check out the guide *Are You on Target? The Basics of Audience Research & Field Testing*
Stages of Change

In order to help someone make a change in his or her behavior, you need to understand where a person is in the change process. Dr. James L. Prochaska created a model with five stages of change conceptualized for a variety of problem behaviors. The Transtheoretical Model or Stages of Change Model includes:

1. **Precontemplation**
   Not thinking about making a change; possible denial of problem

2. **Contemplation**
   Considering making a change; testing the costs and benefits of making a change

3. **Preparation**
   Preparing for change; attempting small changes

4. **Action**
   Taking a definitive action to change behavior

5. **Maintenance**
   Maintaining the new behavior over time

When selecting or writing materials to encourage an audience to make a behavior change, focus on using this model to help guide the intended audience through each *stage of change*. For more information check out: “A Stages of Change Approach to Helping Patients Change Behavior”

**Setting Realistic Objectives and Determining Content**

**Objectives**

Limit the objective to what the majority of the target population needs to learn. Objectives keep the material focused on concrete actions and will help guide content decisions to avoid unnecessary details. Think about the many possible
content points, but focus on which ones enable the reader to take the desired action. Use a planning sheet to write down your objectives and key points before you begin. Remember, audience research helps make determination.

**Content**

To help guide content decisions you want to consider the following questions:

- What is the purpose of the material?
- How will it be used by your reader? (quick reference tool, skim for interest, or read thoroughly to learn how to do something)
- What do you expect the audience to know, do, and feel?
- Is the material a “stand alone” piece or part of a larger communication plan?
- What is the least amount that can be included to give the information/motivation needed to change behavior or perform the procedure?

Most novice writers put too much content into a piece when developing material and the key messages get lost in a “wall of words.” Determine what is important and don’t try to say more about your topic than you have to.

💡 **Mind Mapping**

A mind map is a simple, easy way of brainstorming ideas using key words, colors and imagery. It is a non-linear way of generating and organizing information to capture the natural flow of ideas. Use mind mapping as a way to help determine content and how to organize the key messages.

- **Start by drawing a picture of your topic in the center of the page.** This serves as home base for creative associations. You can use a word that symbolizes the topic; however, pictures are much easier to remember than words and will increase your ability to think creatively about the subject.

- **Use key words.** Start with an open attitude and use free association.
  - Create sub-centers or sub-themes as ideas emerge and print one or two word descriptions of these ideas on lines branching from the central image.
  - Put down ideas as they occur, wherever they fit. Do not judge or evaluate ideas at this time.
  - Print key words. It is easier to remember print rather than script. Use lower case, which is remembered better than upper case.
  - Print one key word per line to minimize clutter and maximize the number of creative associations for each word.
Think fast. Your brain works best in 5-7 minute bursts, so capture that explosion of ideas as rapidly as possible. The key words, symbols and images provide a short hand to help you record ideas quickly.

- If you run out of space, break through the 8 ½ by 11 mentality that says you have to write on white, letter-size paper with black ink. Use easel or ledger paper or cover an entire wall with paper to capture ideas.
- If you are stuck, chose any key word on the map and immediately print your first association with that word. Do not worry about making sure every word is right.

Form relationships. When you feel you have generated enough material through free association, take a look at all the ideas spread across the page.

- You will begin to see relationships that will help you organize and integrate your ideas. Look for repeated words throughout the map that suggest major themes.
- Connect related parts of the map with arrows, more lines, codes, icons and colors to show relationships between different branches. (Prioritize main points using different colors for the main points and sub-points, etc.)
- Eliminate items that seem extraneous to pare the map down to just those ideas needed for the purpose.
- Put the ideas in sequence using letters and numbers to organize the map.
Writing Style

Clear writing depends on a number of techniques, such as using active instead of passive voice, a conversational tone, shorter words, and concrete examples. This section will cover these and many more techniques that can simplify your writing.

Conversational Style

When creating your written material, you want to use conversational style as if you are talking directly to your reader. Instead of saying, “Patients are asked to register at the reception desk before each appointment,” talk directly to your reader and state, “Please register at the reception desk before your appointment.” Choose common words as if you are talking to someone.

Active Voice

Another way to make materials easier to read is to write in the active voice. Active voice means the subject of the sentence is doing the action. Active voice is direct and engages the reader more effectively than passive voice. Verbs in the active voice are more forceful and lively because they put more emphasis on the doer of the action.

Look for the passive voice when a helping verb is used or when the verb “to be” is used. When the word “by” is used, the sentence is more than likely passive. You should use passive voice sparingly. Instead of using passive voice, “This medicine is to be taken before every meal” try to use active voice by saying “Take this medicine before every meal.”

Everyday Words

It is important to remember to use everyday words, not medical jargon. An example of medical jargon is “With the onset of nausea, diarrhea or other gastrointestinal disturbances, consult your physician immediately.” While the medical professionals may understand this information, patients simply need to read, “If you start feeling sick to your stomach, have loose bowel movements or other problems, call your doctor right away.” A list of complex words and phrases that have been simplified is available for future reference. Complex vs. Simple Words and Phrases Sheet

Plain Language Alternatives for Patient Information and Consent Materials by Sharon Nancekivell.
There may be times when medical jargon is necessary. If a patient needs to know the medical terms, use the lay term first, followed by the medical term, and providing appropriate pronunciation techniques for the medical term. A description or explanation of the medical term needs to be given for the patient to understand the concept.

**About Cardiomyopathy**

Cardiomyopathy means **heart (cardio) muscle (myo) disease (pathy)**. This disease changes the heart muscle and weakens it. The weakened heart muscle may become thin and get larger. The entire heart muscle is weak and pumps less effectively. Over time, the heart goes into a state of pump failure. It cannot supply the body with enough blood flow. Often, it is a long-term (chronic) disease and you will have to adjust your lifestyle.

**Short Words and Simple Sentences**

Short words and simple sentences help to increase readability of your message. Use one or two syllable words. Keep one idea per sentence and 15-20 words or less in a sentence. An example of how to use short words and simple sentences would be to say “To lose weight, eat less and exercise more” instead of saying “By increasing your daily physical activity and decreasing your caloric input, you could lose excess weight in the most efficient and healthy way.”

**Concrete Examples, Not Abstractions**

Be specific about what actions to take. People have difficulty inferring the action based on general instructions. Give your reader specific details and examples or show them how. Don’t say “take this medicine twice a day” as the person may take the medicine only several hours apart or they may think that two pills at one time is twice a day. If you want the medicine to be spaced throughout the day, you need to say “take this medicine when you get up in the morning and at night before bedtime.”

When general principles or concept, category, or value judgment words are used, readers miss the message and do not know exactly what we mean or what to do

- **Concept words:** environment, nutrition, prevention, screening, in balance, in the range of
- **Category words:** activities of daily living, exercise, carbohydrates, fish, grains, vegetables,
• **Value judgment words:** regular, excessive, heavy, strong, weak, lots of, adequate, may,

Instead of using these types of words, use directives. Give examples, instead of, “Eat more poultry and seafood and less red meat,” try, “Eat more chicken, turkey, and fish and less beef, lamb and pork.”

**Tone**

How we say something is often as important as what we say and when we say it. Tone captures this sense. Use positive tone when possible. “You must fill out these forms prior to your appointment,” may not be as motivating as, “If you fill out the forms before you come in, we can take care of you faster.” Avoid a high-handed tone. Try not to use words like *you should, you must,* or *you ought.* Be friendly, or at least neutral, rather than harsh or demanding. Stress the benefit of taking the action needed, rather than not taking action, and focus on the pronoun “we,” instead of “you.” Limit the number of requests and directions you make. Patients who have stress can remember and follow through with only a limited number of items. Invite people to join in behaving in an appropriate way.

**Consistency**

Be consistent in your writing and list items in the same grammatical form.

**Wrong way:**
Ways to stay healthy are:
1. Getting 8 hours of sleep each night
2. Stop smoking
3. It is important to get regular exercise
4. You should eat 3 balanced meals a day
5. Maintain an ideal weight

**Right way:**
Ways to stay healthy are:
1. Getting 8 hours of sleep each night
2. Quitting smoking
3. Walking every day
4. Eating 3 balanced meals a day
5. Keeping an ideal weight
Keep Your Audience Engaged

Remember to keep your audience engaged with your writing style. Make instructions interactive so your readers must actively do, write, say, or show something in response to the instructions. Sometimes material can be started with a set of questions, such as “Are you at risk? If you answer yes to any of these 3 questions, you have a chance of getting osteoporosis.”

- Write short questions with a blank line to write in the answer.
- Ask the reader to circle or check the right choice to a question.
- Ask the reader to put steps into the proper sequence
- Ask the reader to match a name of something with a definition or picture
- Pose a problem and ask the reader to write or say how to resolve it.
- Ask the reader to demonstrate what they read.
- Use true/false or multiple choice questions for a self-quiz.

Sometimes pictures with captions can tell the whole story better than words. Using testimonials or dialogue engages the reader because people like to hear from others like them. Work a testimonial into a longer piece or let it stand alone with a picture of the person in the story. This is very effective if you can get a community spokesman or a “local hero.”

People are often willing to read dialogue more than straight text. Dialogue is generally easy for the eye to follow and usually appears in short chunks. Dialogue is used extensively in Hispanic photo-novellas, an adult comic book style. Use small amounts of dialogue (quips) to personalize a longer text.

Organization of Materials

Organizing the text so it is structured and sequenced for readers to quickly get the message is an essential component of easy-to-read materials. Learn how to present the information in a logical way to the intended user. Using a title page or cover helps the reader focus on the core content of your message. Covers for a multi-page piece or the top of a one-page handout are key places to grab the reader’s attention and drive home the key message.

A cover should include:
- A snappy title
- An appropriate illustration
- A core action message
• A clear indication of the target audience

**Chunking**

Chunking regroups like information into several, smaller groups under its own subheading. This process helps the reader remember information; however it has been shown that short-term memory can rarely store more than seven independent items.

Chunk and sequence content in a way logical to readers and in the proper order to carry out the behavior or what you are asking them to do. Group the information into chunks with a clear, ordered format. Sequence these as steps (1, 2, 3), chronologically by incidence, or by topical arrangement (main heading, subheadings) depending on how the audience will use the information.

**Paragraphs**

Paragraphs or sections are short, visually distinct, labeled with subheadings, and stick to the point. Limit each paragraph to a single message. In each paragraph, you want a main topic, supporting facts, and no more than five sentences. Also, be sure to include enough white space between each paragraph.

**Bullet Points**

Cluster important points with bullets separate from the text. List no more than 5-7 bulleted items at a time for the best recall. Break up long lists into groups with sub-headers.

**Key Messages**

Key messages are action or behavior focused, immediately evident and repeated. The purpose of the new key message is stated and relates to the context of the readers’ lives. With each message, 3 to 5 major points of “need to know” information is stressed and very evident to the reader. Give readers the most important points first, repeat these points in the body of the text, and summarize the points at the end. If you give the reader an action step to do right away, reinforcement occurs and improves retention of the information. Taking action moves the reader into desired behaviors immediately.

When organizing your materials, remember you can enhance long-term memory when you:

• Use words already known in a familiar context
• Hook new information to what the person already knows
• Teach new terms and reorganize existing ideas to give a new frame of reference
• Present new information in small repetitive steps
• Use analogies, case studies, drawings, pictures, demonstrations to link new ideas with old information
• Create visual perceptions or ideas associated with feelings and emotional involvement, which is easier to remember than verbal learning

**Appearance and Design**

Design elements include size, shape, color, pictures, and text layout. Use design elements to attract attention. Include design in your planning process, as it is integral to easy-to-read materials, not something to add on later. A cardinal rule of text layout is to limit the amount of text you use and leave about 50% white space on each page.

**Typeface**

Typeface is another word for font. When choosing which font to use in your materials, remember that print materials are easier to read in Serif Typeface. A serif is the small stroke or embellishment added to a letter. A serif appears as the feet of a letter ‘A’, or the hat on a letter ‘C’. These “feet” and “hats” help to distinguish between letters and numbers such as i, I, or 1 (i, I, or 1 in san-serif typeface.) Helping to distinguish between letters and numbers allows for easier readability.

For titles, headers, and when putting material on a screen, San-serif Typeface should be used. (Examples of San-serif Typeface include Arial or Tahoma.)

*Italicizing* font or using ALL CAPITAL LETTERS is hard to read. Readers with limited literacy depend on the shape of the letters to help them decode the words, and all capital letters do away with the shapes. Whichever font you decide to use, remember that using upper and lower case letters makes the words easier to read, including in headings.

**Type Size**

To determine the size of your text, keep in mind the age of the intended reader. Use at least 12-13 point type size for younger readers and 14 point or larger for older readers or for those with vision problems. Remember these size rules both in print and online. To help the
reader more easily navigate a piece of text, titles and headers need to be proportionally larger than the text body, depending on the size of the piece.

**Width of Columns**

Keep the total width of text between 3 to 5 inches. This results in wide side margins on an 8 ½ X 11 paper, unless columns are used. Very narrow columns or sidebars result in word-by-word reading. This can create difficulty in comprehension. Standard lines of print at 6.5 inches make it hard for the eyes to easily return to the next line.

**Lists**

Lists help to break up a paragraph into easy to follow sections. Keep lists to no more than 5-7 items per category and use a heading to indicate the category. Use bullets to set off each item. Remember to keep white space within lists and leave about ¼ inch between the bullet and the first word. If a bulleted item has multiple lines, make sure to align the first words of each line.

**Justification for Reading Ease**

Keep the left margin even down the page. The first letters on each line should follow directly under each preceding line. This is known as “left justifying” text. The right margin is always uneven or ragged. Let the computer “wrap around” the lines for the right margin. If you justify the right margin, the computer will distribute space between words un-evenly, and even split words using hyphens. This creates large gaps in mid-sentence and makes it harder for the eye to move smoothly through the message. The eye gets “stuck” in the gaps between the words.

**Line Breaks**

The end of each line of text should lead the reader to the following line. Using hyphens can disrupt the flow of text and distract the reader as they try to comprehend the line of text. As a rule, avoid using hyphens.

**Poor Example:** The cat sat on the back of the chair gazing out the window at birds playing in the trees.

**Better Example:** The cat sat on the back of the chair gazing out the window at birds playing in the trees.

When hyphens cannot be avoided, do not hyphenate a word shorter than five letters and no fewer than three letters should be before the hyphen when you do hyphenate.
Creating Emphasis

Some parts of a text may need extra attention by the reader. To create emphasis, use:

- Larger print size
- Bold lettering
- Underline
- Pictures
- Different font
- Color
- Box around words
- Indentation
- Bullets
- Highlighter
- Dividers / tabs between sections for long documents

Certain techniques should not be combined. For example, do not bold and underline, choose one or the other.

Reverse Print and Print / Paper Contrast

Lack of contrast makes materials difficult to read. Dark print on a light background (white or yellow) is the easiest to read. Black, dark blue or dark purple ink is the easiest to see and read.

Reverse print is the use of light text on a dark background. Do not use reverse print, as it is hard on the eyes, especially for older readers. White letters on black background should be reversed only for titles or captions. Non-glossy paper also adds to ease of viewing as glossy paper may cause glare.

Using Visuals

Visuals help to illustrate the meaning of text. Reasons for using visuals are helpful to:

- Show anatomical relationships
- Describe something difficult
- Differentiate sizes, shapes, sequence
- Give emphasis to key points
• Substitute for text
• Provide motivation
• Add variety and break in the text

A general rule for using visuals is to use life-like pictures, not abstractions. People generally want to see themselves in pictures. Logos, schemas, and abstract drawings are culture-dependent and require complex inference skills.

Keep all visuals relevant to the text, simple, life-like, and appropriate for the intended audience. When body parts are used, show them in the context of the whole body and do not use cartoons for body parts. Visuals should be free from distraction and clutter. Each visual should relate to one message of text. Captions need to explain the use of a visual. Avoid using charts and graphs. Chose and use a consistent style of illustration or visual throughout the material to enhance appeal.

The best illustrations:
• Attract attention
• Support and reinforce the text
• Are placed close to text with captions
• Are realistic
• Are culturally appropriate

When using a visual, show the correct or right thing to do or way to do it. Do not show the incorrect way, unless you draw a big X through the picture indicating that it is the wrong way. The symbol of a circle with a line through it is not easily understood, as it is not a universal symbol, and therefore should not be used. Be careful with the message your visuals convey as the mind remembers pictures more easily than words.

Use of color

Color can help to add emphasis as well as increase appeal. A general rule of color is that less is more. Color should only be used to enhance the message and not used to decorate the page. When using color, be aware of color blindness, offensive colors, or cultural meanings associated with color.
Readability Formulas

In addition to these guidelines for writing in plain language, readability formulas can help you develop easy-to-read materials. Readability formulas are typically inexpensive, and quick and easy to use. They predict general reading difficulty (plus or minus one grade level) and give writers information about choice of words and sentence length. Some examples of readability formulas include:

- **SMOG**: Measures materials written between 4th grade and college level. Most popular because of accuracy, speed of use, and simplicity.
- **Fry**: Measures materials between 1st grade and college level. More accurate at the lower levels.
- **Flesch Reading Ease**: Correlates well with SMOG and Fry. Uses scale of 0-100 rather than grade levels. A chart is needed to interpret scores.

While readability formulas can be used to measure reading difficulty, it is still important to follow plain language guidelines, because a readability test does not tell you:

- If the material is written clearly
- If your ideas are too complex
- If the information is accurate and logical
- If the material makes sense
- If the vocabulary is appropriate for the client
- If the grammar is correct
- How to respect gender, class or cultural differences
- If the design is attractive and helps or hinders

For more information about readability formulas refer to the article [Who’s Reading Your Writing: How Difficult is Your Text?](https://www.readabilityformulas.com)

Summary

When creating or choosing educational material, it is important to remember that nearly half of all American adults struggle in their ability to read and understand health information. Using plain language guidelines is essential for writing or sharing health information or education. In summary, the guidelines for selecting and writing materials in plain language include:

- Define your readers wants and needs
- Set realistic objectives to determine content
- Simplify your writing style
- Organize the material in a logical way
- Use design elements to attract attention and support the message
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