SAN BERNARDINO COUNTY

Behavioral Health
Public Relations and Outreach

Easy-to-Read
Guidelines for Clear and Effective Communication

Adapted from New York City's "Easy-to-Read NYC" handbook http://www.nyc.gov/html/adulted/downloads/pdf/easy-to-read-nyc.pdf

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Introduction

Achieving Clear and Effective Communication

Clear and effective communication is essential for Department of Behavioral Health (DBH) programs to achieve their mission. However, messaging can be complicated and if done incorrectly, will keep you from reaching your intended audience.

These guidelines are intended to help you create documents that are clearly written, easily and accurately translated, and understandable by your intended audience.

They are not concrete rules that must be applied without discretion or judgment. On the contrary, the guidelines assume that you are a skilled writer and that your program will use them to build on the successes you have already achieved.

These guidelines are also to be used in conjunction with existing San Bernardino County branding and communication guidelines, as posted to www.sbcounty.gov/dbh. For questions or concerns, please contact Public Relations and Outreach (PRO) at (909) 386-9720 or DBH_PIO@dbh.sbcounty.gov.

Guidelines

The following guidelines present nine principles associated with effective written communication that you can refer to when creating and revising documents:

1. Use a Plain Language Approach to Communications.
2. Define the Purpose of Your Written Document.
3. Only Include Important and Directly Relevant Information.
4. Use Simple Language.
5. Keep Sentences and Paragraphs Short.
6. Make It Personal.
7. Use the Active Voice.
8. Use Easy-to-Read Design Techniques.
9. Assess the Usability of Documents: Listen to Your Readers.

Taken together, these simple strategies will help you write documents in plain language. Plain language communications are more effective than traditional government writing.

1. Use a Plain Language Approach to Communications

Plain language <u>is</u>:

A set of strategies and techniques – a mix of art and science – for good professional writing. A document written in plain language conveys information clearly and in easy-to-understand language. It is free from bureaucratic jargon or "legalese" language which may confuse or alienate our readers. Plain language writing helps readers get to the heart of the matter within the first paragraph.

Plain language is <u>not</u>:

Unprofessional, disrespectful, or inaccurate. It does not "dumb down" information for the public. In fact, using plain language is respectful because it values the readers' time.

Why should government agencies adopt plain language communication strategies?

When government agencies adhere to plain language principles, the public is more likely to know how to access the services they need and act upon the information that we provide.

Benefits of using plain language

- **Reduce the amount of time it takes for individuals or organizations to comply with your instructions.**

  With plain language, DBH clients can understand our message and instructions the first time they read our documents.

- **Increase the likelihood that we get the response we are seeking.**

  Clients who receive confusing letters or unclear public documents may not do anything at all or simply throw our letters or pamphlet in the trash.

- **Cut down on the number of customer service phone calls, inquiries, and complaints.**

  When people don't understand the information we provide, they contact our front-line staff, hotlines, PRO, or the San Bernardino County Board of Supervisors (BOS) to understand how to act on the information we provide. People will also share their complaints on social media platforms and in some cases, have shared the names of the county employees who have 'mistreated' them.

- **Increase cultural competency.**

  Accurate and high-quality translation starts with easy-to-read English-language documents. Translators will make fewer mistakes and better convey your message when they are translating plain language documents.

- **Increase transparency and hold ourselves accountable for the messages we send the public.**

  Good customer service starts with us. We can improve our reputation as responsive and accessible by respecting our clients' time – the time it takes our clients to understand our message and get the services they need.

DID YOU KNOW?

In 2003, Washington Department of Revenue created the "Straight Talk" program. They trained employees in plain language principles and rewrote 250 customer letters using plain language guidelines. The rewrite of one tax collection letter has resulted in the state collecting an additional $5 M to date.

One Washington Department of Licensing letter rewrite resulted in a 95 percent reduction in its hotline calls.

In 2005, in recognition of this success, Washington State Governor Christine O. Gregoire signed a "Plain Talk" Executive Order requiring all state agencies to use plain language in written communication.

- www.plainlanguage.gov/examples/government/WArules.cfm

2. Define the purpose of your document

Start by asking yourself:

1. What is the purpose of this written document?
2. What am I trying to achieve by writing it?

Be as specific as possible. Examples include:

- Help low-income individuals, dealing with mental illness, complete a job application,
- Convince an eligible client to complete the Supervised Treatment After Release (STAR) program's recommended classes.
- Explain the Substance Use Disorder and Recovery Services (SUDRS) program's procedures for accomplishing a specific task.
- Warn a client in the housing program that they are out of compliance with a regulation and that they will face penalties if they do not comply.

If you answer the questions about purpose with phrases like "educate the public about", "raise awareness of", or "provide public disclosure", try asking yourself a follow-up question:

- "How is this purpose connected to my program's strategic goals?" or
- "What do I want people to do once I have accomplished this purpose?"

After answering these follow-up questions, take another look at your document. Can you revise it to be more helpful to the reader and more action-oriented?

Then ask yourself:

Who is my target audience? Who am I trying to reach with this document? You may be trying to reach more than one audience. It is good to define the different audiences you are trying to reach and prioritize them: who is it most important that we reach with this message? Examples include:

- Young adults or Transitional Aged Youth.
- Low-income clients with limited English proficiency.
- A new client with a complaint.
- A long-term client that is out of compliance.

If you answer these audience questions with phrases like "members of the public," "constituents," or "parents," try asking yourself: "who among this group would I like to reach the most?" Precisely defining your priority population will help you develop a message that is relevant and helpful.

Once you have identified your intended audience, think about them as readers and try to answer the following questions:

- What will your audience's reaction be when they receive the document? Will they be pleased, disappointed, frightened, etc.?
- Will readers likely take action, set the document aside, or throw it away?
- Is there anything you can do in your document to encourage the desired reaction?
- What background information are they likely to already know? Is that enough for them to take the desired action?
- Will they be familiar with the context of your document and your specific message to them?

Consulting with agency staff or partners who have day-to-day contact with your intended audience may help you answer these questions.

3. Only Include Important and Directly Relevant Information

Most readers have a short attention span and will not understand and retain large amounts of information. Most readers are likely to scan or skim your documents, instead of reading the entire thing word-for-word.

Therefore, try to include only information that is important to accomplish your purpose and that is relevant to the intended audience. It seems obvious, but we often include unnecessary information (especially in brochures and pamphlets) to make our documents look substantial and sound important.

It may be helpful to look at each section of your document and ask yourself:

1. How does this information help achieve my purpose for the document?
2. How does this information help the reader do what I want them to do after reading my document?
3. Given what I know about my target audience and their circumstances, will this information really help them?

It may also be helpful to check with staff who have direct contact with the intended audience to get their sense of what information would be important and relevant to your readers.

People with day-to-day contact with your intended audience also may help you understand what your readers might be confused about or unable to understand.

Don't bury important information.

Examples:

BEFORE	AFTER
When a claim has been closed for over seven years (or ten years for eye injuries) only the director has the authority to grant time-loss benefits. The director may only grant these benefits in exceptional circumstances. I'm pleased to inform you that you are eligible for time-loss benefits effective Oct. 1, 2003	Thank you for your letter requesting wage replacement benefits related to your earlier workplace injury or illness. After reviewing your claim, we will grant you these benefits, effective Oct. 1, 2003. *- Courtesy of Office of the Governor, State of Washington and the Washington Department of Labor and Industries*

BEFORE	AFTER
There has been much debate about changes in criminal justice laws.	Do not be afraid to go to seek guidance from the County of San Bernardino. The Adult Criminal Justice (ACJ) division will be able to assist in determining a proper course of action.

TIP #1

Put the most important information first, at the top of the page or in the first paragraph.

Make sure the information is in logical order. For example, if you are writing instructions, list the tasks in the order the person must do them.

People are more likely to act on instructions when they are informed clearly how to do so.

Example:

We have approved your claim. Before we can send your check, you must:

1) Fill out the enclosed form and include your:
   - social security number
   - address
   - signature

2) Mail the completed form to:
   Government Office
   P.O. Box 2222
   New York, NY 100

3) Send it to us before:
   November 1, 2006
   After we receive your form, you should receive your check within 30 days.

Try to limit yourself to a few main points.

As previously mentioned, most readers will be scanning your document and will not be paying close attention – no matter how important your communication is. You may have many important things to tell them, but remember that most readers will not understand, retain, and act upon more than a few points from any written document.

TIP #2

Keep the "fine print" information in the fine print.

Use your main text to get your MAIN points across. Often, there is some information that your readers should have for reference, but you know that they are unlikely to read and use it.

In these cases, you can provide the information in "fine print" outside your main text and refer the reader to it.

You can also give your reader some explanation in your main text of what is in the fine print and why or when they should read it.

It is probably a good idea to prioritize the points that you want to communicate and present them in the order of importance or in the most logical sequence, as in the example above.

4. Use Simple Language

Plain language means writing in clear terms using common, everyday words whenever possible.

Use simple and straightforward language.

Example:

BEFORE

The purpose of New York City's Financial Disclosure Law is to provide accountability on the part of public servants, and to help ensure that there are no prohibited conflicts of interest between City employees' official responsibilities and private interests.

AFTER

The City's Conflicts of Interest Law prohibits public servants from using or appearing to use their City positions for their own personal benefit.

- NY Conflicts of Interest Law Covering NYC Public Servants

Avoid Using Jargon, Legalese and Acronyms.

Bureaucratic jargon – terms that are specialized to an organization, industry, or profession – can often be confusing, misleading, or intimidating. "Legalese" is also hard for most people to understand. Therefore, try to avoid using jargon or "legalese" whenever you can.

Examples:

BEFORE

We have been notified that you did not receive the state of Washington warrant listed on the attached Affidavit of Lost or Destroyed Warrant Request for Replacement,
form **F242-026-000**. The State Treasurer's Office has informed us that the warrant is outstanding and has not been cashed as of today's date.

AFTER

Have you cashed your check yet?

The State Treasurer's Office has informed us that a check we sent you has not been cashed. Review the attached legal form. It will show the amount of the check, what it was for, and the date it was issued.

BEFORE

By this notice, demand is hereby made for you to exercise your right of election pursuant to RCW 51.24.070.

AFTER

This is our formal demand for you to give us your decision.

- Courtesy of Office of the Governor, State of Washington and the Washington Department of Labor and Industries

TIP #3

When you must use specialized language –

as opposed to simpler, plain language – always try to provide a clear explanation for the terms you use.

Your readers will appreciate you giving them a short definition for unfamiliar words within the body of your document.

Examples:

Medical terms:

Antipsychotic	= medication used to treat psychosis
Chronic	= persisting for a long time or constantly
Delusions	= beliefs that have no basis in reality

Legal terms:

Abet	= to help commit a crime
Executor	= person named to carry out the terms of the will

Ask yourself:

Do you have to use legal language or jargon?

- If the answer is no, use PLAIN LANGUAGE.

- If the answer is yes, DEFINE the legal language or jargon.

Make sure that your definition is correct.

If you choose to define legal language or jargon, always check definitions with your agency legal or program experts.

Source [National Institute of Mental Health]

Spell out acronyms.

Acronyms can be helpful when the reader already knows what you are talking about. Acronyms can help you write shorter sentences and save space in your documents.

However, acronyms are impersonal and abstract. Readers who are not already familiar with an acronym will have no way of knowing what it means. In this way, acronyms can be intimidating and confusing to some readers.

If you feel it is important to use an acronym, always spell it out when you use it for the first time.

5. Keep Sentences and Paragraphs Short

Short sentences, each containing one single thought, are easier to read than long sentences. Sentences should be simple, active, affirmative, and declarative.

If your sentences average 15 or more words, see where you can break them into two shorter sentences. Paragraphs should have three to four sentences. This approach will create smaller chunks of information that the reader will be able to absorb and act upon.

Remember, the more your writing deviates from this clear and to-the-point structure, the harder it will be to understand.

Examples:

BEFORE

This is a reminder to all residents and business owners of the upcoming public hearing, to be held on January 17 in the Main Conference Room, regarding the proposed waterfront redevelopment project

AFTER

Public Hearing Reminder

Attention all residents and business owners:

There will be a public hearing to discuss the proposed waterfront redevelopment project.

The hearing will be held on January 17 in the Main Conference Room.

BEFORE

I understand that fees are due and payable on the date that services are rendered and agree to pay all such charges incurred in full immediately upon presentation of the appropriate statement.

AFTER

I agree to pay my bill on the same day that I receive the services.

www.hsph.harvard.edu/healthliteracy

6. Make It Personal

Government writing often lacks the personal touch. In fact, sometimes we try to make our documents as impersonal as possible. But when we do, our readers are more likely to ask, “why should I care?”

This is why we need to make our writing more personal. Instead of talking about your program in third-person perspective, write documents using words like “I, me, we, our, you, and yours.”

Create documents so the audience will feel as if you are talking to them as individuals. Avoid speaking as if you are a bureaucracy talking to an insignificant person.

Examples:

About the Earned Income Tax Credit (EITC)

Do you make less than $35,000 a year? You might qualify for as much as $6,000 from the EITC, just by filing your taxes. You can use your EITC money to pay bills or school tuition, buy a car or save some of it in a bank account.

- NYC Department of Consumer Affairs

Restaurant Owner’s Manual

You’ve probably looked at the table of contents and hit your hand across your forehead exclaiming “Don’t I have enough to do running a restaurant in New York City? Do I have to learn all this too?”

Don’t be overwhelmed. You’re probably adhering to a lot of these laws already. With a few complicated exceptions, this stuff is pretty fundamental, and you don’t have to sit down and read the whole thing at once.

You can use this as a resource to go back to if an issue arises and figure out what the appropriate steps to take are, or learn the right places to go for help.

- NYC Mayor’s Office of Immigrant Affairs

7. Use the Active Voice

Don't be passive. Documents written in the passive voice tend to be both longer and less clear. The passive voice makes it difficult for your audience to figure out who is responsible for what. The passive voice can also give people the appearance that government officials are avoiding accountability.

This does <u>not</u> mean you should write every sentence in the active voice. It does mean that you should know why you are writing in the passive voice instead of the active voice.

There may be times when it is appropriate to use the passive voice. For example, when you want to emphasize who is the recipient of an action rather than who is doing the action.

Example:

> Schools won't be penalized for how well students perform when they first arrive.
> *- Chancellor's Letter to Parents of the New Accountability Initiative, June 2006*

You can decrease use of the passive voice by:

Identifying sentences that use the verb "to be" plus a past participle (i.e., was issued, is administered) or start with phrases like "there is" or "it was discovered that."

Examples:

- It is acknowledged that your application was received.
- Research will be presented at the community forum to be held on Thursday.
- There are experiments being conducted on the chemicals.

Try to rewrite the sentence in the active voice. Is it less clear if you do so? If not, then use the rewritten version.

Examples:

- We received your application.
- We will present our research findings to the community at the forum on Thursday.
- Scientists are conducting experiments on these chemicals.

Examples:

BEFORE	AFTER
Tiny pieces of peeling or chipping paint are dangerous if eaten.	Never let your child eat pieces of paint. The paint may contain lead. Lead is dangerous for your child. Even very small pieces of lead are dangerous for your child.

BEFORE	AFTER
It is recommended that the wire should be connected to the terminal by the engineer when the switchbox assembly is completed.	We recommend that you connect the wire to the terminal when you finish assembling the switchbox.

8. Use Easy-to-Read Design Techniques

Content means nothing if it is not displayed in a way that makes sense. Your audience will most likely scan your documents for relevance before they read the documents. Therefore, how you design your document matters.

There are many ways that you can use the appearance of your document to make it easy to read, including:

- Use a layout consistently throughout your document that makes it easy for the reader to find the most important information.
- Include a document title that lets the reader know what he/she is reading and the purpose of the document.
- Use headings in bold print that summarize the main point for each topic in your document.
- Write short sentences and paragraphs. Present information in small chunks under a heading that summarizes the main point.
- Incorporate white space - don’t create a dense, dark, text-filled page.
- Use bulleted lists.

9. OPTIONAL - Assess the Usability of Documents: Listen to Your Readers

How can you tell if your attempts at plain language have worked? How can you increase the likelihood that your communication will be effective and achieve its goal? Listen to your readers.

Conduct a focus group or two with real members of your intended audience to test your documents. Don't be afraid to revise an existing document or write another draft of a new document based on feedback you receive.

How to conduct a focus group to assess your documents.

Some agencies routinely test their written materials with their intended audiences. Here are some suggested steps for conducting a focus group:

- Gather a sample of 6-10 individuals from your intended audience who agree to read the documents and give you feedback. They should represent the range of ages, educational backgrounds and occupations of your intended audience.

  If you are writing or revising a document for existing clients, recruit existing clients. If the purpose of your document is to convince someone to do something (e.g., apply for benefits, utilize your agency resources), recruit individuals who are <u>not</u> currently doing that thing. Explain the goal and what their role is. Be sure to convey the session is not intended to test *them.*

- Have the group members read the documents. It is often helpful to test more than one version of the same document and to present information with different levels of complexity.

- Ask your readers to explain what the document means in their own words, including what the reader is expected to do based on the document. You can also ask them what their reaction would be and what they would do if they received that document from your agency.

- Try to identify any conflicts in the understanding among the focus group participants. Remember, this is not a test of whether they "got it." It is a chance for you to understand what your audience is thinking and how they will react to what you have written.

- Ask the readers what would make the communication more helpful to them.

- Use your readers' feedback to revise the document.

Focus groups can help you determine if your documents need to be revised. While this is a suggested step before finalizing your documents, testing and revising your documents should be done repeatedly over the life of the document.