TOOLKIT for Making Written Material
Clear and Effective

SECTION 2: Detailed guidelines for
writing and design
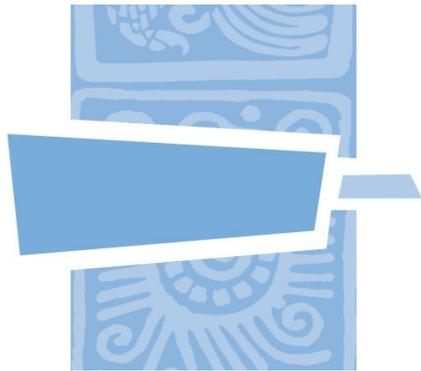
PART 5

Understanding and using the "Toolkit Guidelines for Graphic Design"

Chapter 1

Tips for learning about design and working
with design professionals

TOOLKIT Part 5, Chapter 1

Tips for learning about design and working with design professionals

List of figures in this chapter:

This document is the first of eight chapters in Part 5 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers Consulting, Inc. The guidelines and other parts of the Toolkit reflect the views of the writer. CMS offers this Toolkit as practical assistance to help you make your written material clear and effective (not as requirements from CMS).

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Introduction

About the Toolkit and its guidelines

The *Toolkit for Making Written Material Clear and Effective* is an 11-part health literacy resource from the Centers for Medicare & Medicaid Services (CMS). To help you develop or revise your written material, the Toolkit includes detailed guidelines for writing and design. There are 26 guidelines for writing and 46 for graphic design. For the full list, see Toolkit Part 3, *Summary List of the "Toolkit Guidelines for Writing and Design"*.

About this part of the Toolkit

Part 5 of the Toolkit focuses on the guidelines for graphic design. These guidelines apply to designing various types of written material intended for use in printed formats (see Toolkit Part 1). (For discussion about material that is read on a computer screen, see Toolkit Part 8, *Will your written material be on a website?)*

This is the first of the eight chapters on design in Part 5:

- This introductory chapter gives you background on design and tips for working with professional graphic designers.

- The rest of the chapters in Toolkit Part 5 explain how to apply the guidelines for the following aspects of design: overall design and page layout (Chapter 2); fonts (typefaces), size of print, and contrast (Chapter 3); headings, bulleted lists, and text emphasis (Chapter 4); use of color (Chapter 5); use of photographs, illustrations, and clip art (Chapter 6); tables, charts, and diagrams (Chapter 7); and forms and questionnaires (Chapter 8).

Toolkit chapters on design are written for non-designers

The design chapters in Part 5 of the Toolkit assume that you have little if any background in graphic design. You may have an interest in design, or be responsible for coordinating the design part of your materials. Perhaps you have developed design skills on the job, by producing some of your own written materials. Though you may work on planning, developing, testing, or otherwise producing written materials, we assume that you have not had formal training in graphic design. We further assume that you probably get some help with your written materials from graphic design professionals. You may contract with firms for design services, or use your own in-house resources.

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Just as in any field, graphic design has its own set of specialized skills and terminology. If you don't have training or experience in the field, it can be intimidating to deal with design issues and work with professional designers. Whatever your situation and responsibilities, the Toolkit chapters on design will help you become a better-informed and more discriminating judge of graphic design, and show you ways to improve the design of your written materials:

- **You'll get suggestions about good resources to use.** To help you get up to speed on the basics of design and of getting your materials printed, this chapter suggests some excellent books and websites to consult.

- **You'll get practical advice about using design services.** This chapter has tips on choosing and working with design professionals.

- **You'll get specific guidance on design to apply to your own materials.** As you read the rest of the chapters in this Part 5 section on design, you'll learn how to recognize and avoid many common problems in design. The detailed guidelines and examples in these chapters will help you improve the look of your materials and their impact on readers.

- **You'll learn why certain features of design are so crucial to materials for more vulnerable audiences**. In particular, we address the needs of less-skilled readers and of older adults who are experiencing the normal age-related declines in vision and ability to read and process written information (see Toolkit Part 2, *Using a reader-centered approach to writing and design*). For example, less-skilled readers and older readers need highly readable print, prominent and informative headings, and a clean, uncluttered layout with a clear path for the eye to follow. These and other design features that are crucial for less-skilled readers and older readers will work well for the rest of your intended readers, too. (If you happen to be a design professional, this emphasis on making information materials more reader-friendly for vulnerable audiences may be a new topic for you, since it is seldom covered in professional training for design.)

## Resources for learning about graphic design

Learning the basics of good design will help you feel more confident about the design aspects of your written materials and about working with graphic design professionals. Figure 5-1-a below describes some great resources to help you learn more about design.

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Figure 5-1-a. Resources for learning about basics of graphic design.

Non-designer's design book

If graphic design is a new topic for you, this book by Robin Williams (2004) is a good place to begin. It gives clear explanations of basic design principles (contrast, repetition, alignment, and proximity), and uses many examples to show their impact on written materials of various types.

Dynamics in document design
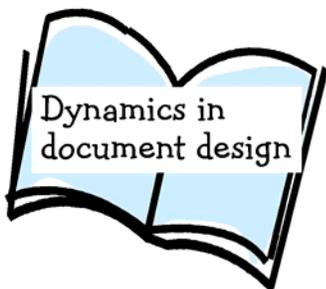
This book by Karen Schriver (1997) is a very detailed resource on research related to design and its impact. Emphasizing practical applications of research findings, this book gives examples from testing that show how crucial it is to take the readers' needs seriously. It also discusses subtleties of cross-cultural aspects of document design.

Before & after page design

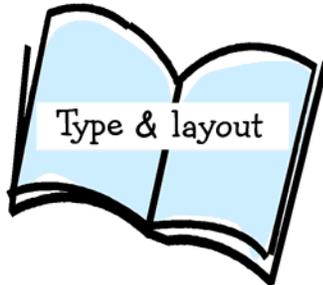**Before & after graphics for business**

These two books are written by John McWade (2004, 2005). They are based mainly on compilations of articles from his periodical called *Before & After: How to Design Cool Stuff* (http://www.bamagazine.com/).

Although McWade writes for professional designers, much of the material in both books is accessible to non-professionals as well. The books have outstanding examples and clear commentary that make them useful and inspiring resources for anyone with an interest in design.

If you find something you want to adapt from these books, they include the technical instructions that you could give to a graphic designer.

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The full title of this book is *Type & Layout: Are You Communicating or Just Making Pretty Shapes* (2005) .The author Colin Wheildon has studied how people react to variations in type and layout of materials. Based on this research about what helps and hinders readers, he describes design practices that you can use to attract and hold your readers' attention and improve their comprehension.

This book by Robin Williams and John Tollett (2007) has hundreds of examples that show how to apply design principles to a wide variety of projects. The commentary is helpful, and the examples are detailed.
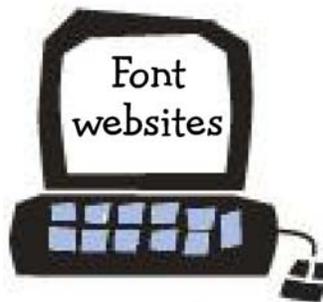
Websites that sell fonts can be an excellent resource for learning more about typography. Some include examples that show typeface design in use and explain the development and features of fonts designed for different purposes. Generally, you can do keyword searches to find fonts for a particular purpose (such as *legible*, *friendly*, *sans serif, handwriting*). Some let you type in your own text and then show you how it looks in various fonts. Two good sites to check are: http://www.myfonts.com and http://www.fonts.com.

This book by Eric Kenly and Mark Beach can help you understand issues related to the actual production of your printed materials. The full title is *Getting It Printed: How to Work with Printers & Graphic Imaging Services to Assure Quality, Stay on Schedule & Control Costs* (2004). This book has a wealth of practical information and advice, including many cost-saving tips.

Full references are listed at the end of this chapter.

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Choosing a graphic designer

Just as in any field, graphic design professionals differ in talent, training, and skills -- not to mention personality, fees, and efficiency. Ideally, you will find a designer or design firm with the expertise and attitude it takes to produce designs that work well for less-skilled readers. Since designers have great impact on the effectiveness of your materials, keep looking until you find a good fit. When you find a good fit, it's wise to cultivate a long-term relationship.

Here are some suggestions for choosing a designer:

- **If possible, find a designer who has expertise in working with low literacy materials.**
  Unfortunately, technical skill in itself does not guarantee that a graphic designer will be oriented toward making your materials easier for readers to understand and use. Relatively few professional designers are trained to be aware of the needs of less-skilled readers and how these needs affect graphic design. Designers who lack training and experience in designing low literacy materials are less likely to know about and focus on ways to reinforce reader comprehension through design. At worst, they may resist following your instructions if you ask them to do something other than their usual practice. Finding a designer with expertise in low literacy materials will help you create the most effective materials in the most efficient way.

- **Look for designers who can create low literacy materials in various styles.** Designers tend to be somewhat specialized, even in a full-service design firm. They also have their own distinctive styles and preferences, which can sometimes influence how they approach a project. Try to find a designer who genuinely likes to create low literacy materials, and who is versatile enough to create them in different styles. Clarity of layout and simplicity of design are hallmarks of low literacy materials. Creating such materials may hold little appeal to designers who naturally gravitate toward producing complex layouts or incorporating the latest trends in design.

- **Look for designers who are non-defensive about feedback on their work.** Many designers are willing to work cooperatively with you. They are responsive to your feedback and eager to meet the needs of your readers. For example, if results from testing show that a layout they designed confused your readers, they are receptive and view it as an opportunity to learn and improve. However, not all designers are so flexible and responsive. Keep searching until you find one who is.

- **If you find yourself feeling intimidated, be wary.** Good design results from give and take. When the client-designer relationship is working well, you should be learning from your designer and vice versa, rather than feeling intimidated. Look for a designer who makes you feel

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comfortable enough to voice your opinions, explain your reasons, and ask for yet another round of changes when you need them. Look for someone who will explain design issues and options in a way you can understand, instead of overwhelming you with technical terms you have never heard. Pick a designer who will discuss your needs and options in a collegial way, rather than telling you what to do.

- **Ask for samples of work, references, and information about fees.** Share the samples of work with others to get their reactions. Call the references and ask questions.

Working effectively with design professionals

Make it easy for the designer to produce what you need within your budget

Producing print materials is a complex process that involves many decisions. Some decisions are made by you, some by the designer, and some are made jointly or dictated by others. Ideally, design decisions reflect careful consideration and solid design principles. But realistically, there's not always enough time to produce the design you might like, and design decisions are sometimes compromised or over-ridden by non-design considerations, such as budget or specific requirements or standards that have been imposed.

Good design requires good teamwork; you and the designer both have responsibilities. Here are things that you can do to make it easier for your designer to produce what you need within your budget:

- **Communicate openly and honestly**. Be clear about your expectations, and encourage the designer to speak freely as well. Don't be afraid to ask questions. Show your appreciation. Don't say you like something if you really don't. Holding back your honest opinions gives your designer misleading cues, which can cause problems later on.

- **Use a mockup as a tool for working with your designer.** In this Toolkit, we suggest that you create a mockup (full size replica) of your print piece to serve as a draft of both the text and preliminary design features (see Toolkit Part 5, Chapter 2, *Guidelines for overall design and page layout*). Using a mockup makes it easier for you to communicate effectively with your designer and get the benefit of his or her comments and advice at an early stage. Using a mockup as a tool will help you and your designer visualize a similar final product from the beginning, which can cut down on the number of revisions you will need. Another tip in Toolkit Part 5, Chapter 2 suggests that you create a resource file by collecting examples of materials to use as visual aids for communicating what you like and don't like in design. Showing pictures from your resource kit to your designer can work better than struggling to describe a particular "look" in words.

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- **Be timely and responsive**. Give the designer your feedback in a timely manner, and follow through on the promises you make. Don't delay the progress of your project by being slow to respond.

- **Tell the designer about your budget constraints and ask for advice on possible ways to save money**. Sometimes you can save money by making relatively minor changes in the design. When designers know you are cost conscious, they can explain factors that affect costs and help you consider the financial implications of decisions that come up. (As we explain in the next section, you will also want to work with printers the same way to get their advice on ways to cut the cost of printing.)

- **Be sure you understand how fees for design services are applied and what is covered by a contract.** Be sure that you are clear about the meaning of terms and conditions included in a bid. For example, your idea of what constitutes "one round of revisions" might differ from what the designer has in mind. To avoid misunderstandings and possible budget problems, talk these things over in advance.

- **Monitor the design costs while the project is underway**. If you are not a designer, it can be hard to know how long it may take to do particular tasks for your project. If you are paying by the hour, rather than a fixed price, keeping close track of the design charges for your project will help you stay on budget. If the costs run higher than expected, you'll want to know right away, so that you can make adjustments in the scope or nature of the work (or in the budget, if that is an option). Many design firms automatically provide a detailed breakdown of time spent on specific tasks on their invoices. Ask for it if they don't, because reviewing the details will help you understand the cost of different parts of the work. You can use this information to guide your planning and to budget with greater accuracy in your future projects.

End notes

Acknowledgements

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