

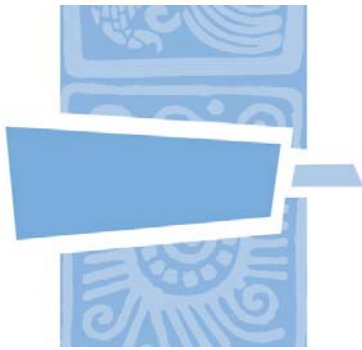
TOOLKIT for Making Written Material Clear  
and Effective

SECTION 5: Detailed guidelines for translation

## PART 11

Understanding and using the  
“Toolkit Guidelines for Culturally  
Appropriate Translation”

U.S. Department of Health and Human Services  
Centers for Medicare & Medicaid Services



## TOOLKIT Part 11

### Understanding and using the “Toolkit Guidelines for Culturally Appropriate Translation”

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This document is Part 11 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

### ***Background on the Toolkit***

The *Toolkit for Making Written Material Clear and Effective* is an 11-part health literacy resource from the Centers for Medicare and Medicaid Services (CMS). It has practical tools to help you improve printed material you develop for people who are enrolling in or receiving services from CMS programs such as Medicare, Medicaid, or Children’s Health Insurance (CHIP). These CMS audiences are culturally diverse and they include people with limited reading skills and older adults such as people with Medicare.

For background on the Toolkit, see Toolkit Part 1, *About this Toolkit and how it can help you*, and Toolkit Part 2, *Using a reader-centered approach to develop and test written material*. To help you develop or revise your written material, the Toolkit includes detailed guidelines for writing and design. There are 26 guidelines for writing in Toolkit Part 4 and 46 guidelines for graphic design in Toolkit Part 5. For the full list of guidelines for writing and design, and a discussion about how to use them, see Toolkit Part 3, *Summary List of the “Toolkit Guidelines for Writing and Design”*. This part of the Toolkit offers additional guidelines that apply to translation of written material.

### ***About this part of the Toolkit***

To meet the needs of people with limited English proficiency, many written materials are translated from English into other languages. This document, Toolkit Part 11, has guidelines to help you produce culturally appropriate translations. We discuss issues to consider and give practical advice on the translation process from start to finish.

Our discussion focuses on translation of written material that is intended for use in a printed format. While people with limited English proficiency also need help from interpreters, this guide focuses only on their *translation* needs:

#### **“interpret”**

refers to **spoken** communication.  
We don’t cover spoken (oral) communication in this Toolkit

#### **“translate”**

refers to **written** communication.  
This part of the Toolkit gives guidelines for translating written material that people read in a printed format (typically printed on paper).

Since our topic is translation of written material, it’s important to note the limitations of written material. For some audiences and purposes, written material is simply not appropriate. It is not suitable for people who cannot read, and must be adapted for readers who have vision loss. And even if your audience members have sufficient reading ability and other literacy skills, written material may not be the most effective way to deliver your message, since learning styles and media preferences differ among readers at all literacy levels and from different cultures.

If you need to share information with people who have limited English proficiency, it’s important to know whether they have the literacy skills and inclination to use written material that is in their native language. If people cannot read in their native language, it will not work to translate your written material into their language.

As you read the discussion that follows, please keep in mind that the design guidelines in this chapter are biased toward English speakers in general and may require adaptation for cultural differences. The discussions of overall layout and navigation, in particular, assume that text is read from left to right. If you are translating materials into languages that read from right to left, such as Arabic or Hebrew, the entire layout must change.

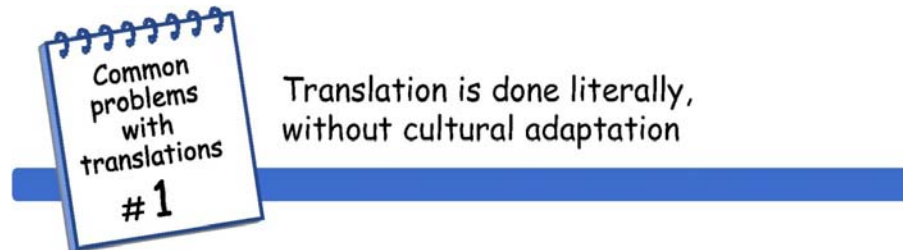


## **Common problems with the quality of translated documents**

If you have worked on translation projects, you already know how challenging it is to produce translations that stay true to the meaning of the English original, yet are easy for the intended readers to understand and use. Anecdotal evidence suggests that when written materials are translated for consumer use, the quality of the translations can vary considerably. Figure 11-a below identifies some common problems with translations.

Figure

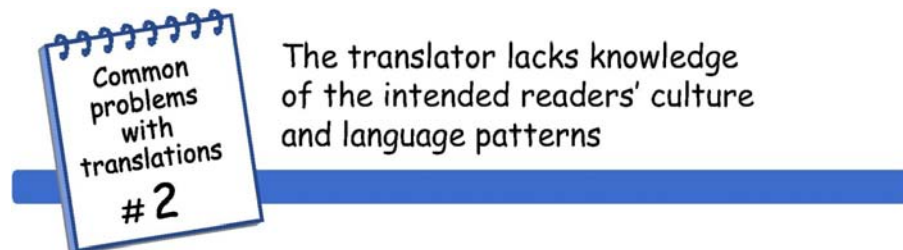
11-a. Common problems with the quality of translated documents.



Some translations are done word for word (“literal translations”), without any adaptation to make the meaning clear and the text sound natural in the target language. A literal translation replaces the English words and phrases with words and phrases in the target language in a way that does not take account of differences in linguistic structure and complex connections between culture and language.

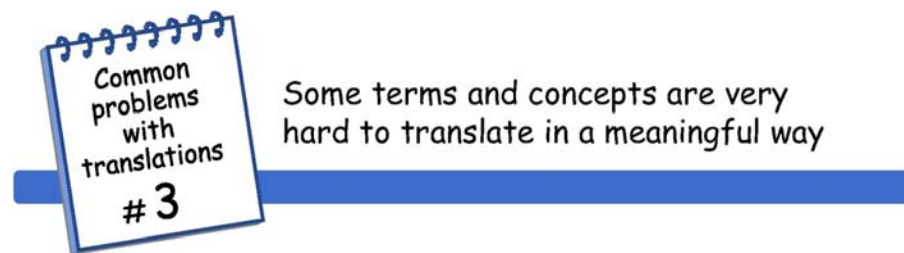
- **At best, a literal translation tends to be awkward.** It is also potentially annoying to those who notice the vestiges of English grammar and syntax in the translated text.
- **But often, literal translations are confusing and potentially misleading.** For example, a leaflet urging people to get more exercise says, “Don’t be a couch potato.” Imagine how strange the term *couch potato* might sound if translated word for word in other languages.

While errors from literal translations can be confusing or misleading, they can also be amusing at times. Humorous examples of corporate slogans and advertising copy that have been mistranslated, either from or into English, have been widely circulated on the Internet. You may have seen examples of clumsy literal translations into English in the instructions that come with products manufactured in another country. Examples of mistranslation remind us of how culture-bound and complex the connections are among the language we use and the lives we lead.



Some translations miss the mark due to the translator’s lack of familiarity with the culture of the intended readers and their local language patterns and word use. When translators are deciding how to convey English words and concepts in the target language, they face many choices about which words and phrases to use. To make good choices, translators must know a lot about the culture and language of the people who will use the translated text, including variations in language use.

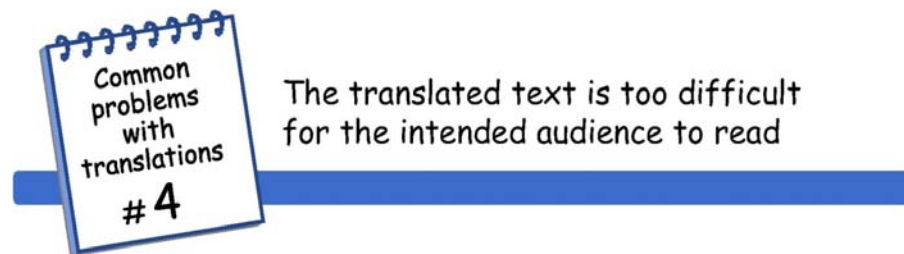
For example, many words in Spanish have different meanings or connotations for Spanish speakers from different cultural backgrounds and countries. If the English text refers to x-rays, the best term for the Spanish translation might be *rayos-x* for Mexican readers, but *placas* would be better for Cuban or Puerto Rican readers.



Even when translators are skilled and culturally knowledgeable, some terms and concepts are very difficult to translate in a meaningful way. Effective translation from English into another language can be challenging because many words, concepts, and phrases have no direct equivalent. Here are some examples:

- Many Medicaid clients with limited English proficiency are immigrants or refugees from countries where health care is organized, delivered, and paid for in ways that are very different from the American system in general, and state Medicaid programs in particular. These clients have trouble understanding the concept of a health plan, no matter how carefully it is translated into their language.
  - Here is an example from the author’s own experience: During an interview that explored her reactions to translated versions of Medicaid CAHPS survey questions and reports, a Vietnamese woman explained the meaning of “health plan” in the following way: “‘Health plan’ is how and what I eat so that it is good for my health.”
- Some concepts that are commonplace to Western medicine defy effective translation because they contradict people’s beliefs about the causes of and appropriate treatment for health conditions. Here are two examples:
  - The *Translation Protocol* by the Minnesota Department of Health (2000:6) has an example that is drawn from an article published in St. Paul Pioneer Press on July 17, 1997. According to this article, there is no word for cancer in Hmong or even a concept of it in the Laotian homeland of the Hmong people. Physicians in St. Paul, Minnesota, discovered to their surprise and horror that the way in which information was translated from English to Hmong had caused some Hmong patients to refuse cancer treatment. When the text about having a patient undergo radiation therapy that had been translated from English into Hmong was translated back into English, it read: **“We’d like to put fire in you.”**

- Cambodian staff members at a hospital in Washington State translated materials about Hepatitis B into Cambodian, and then found that Cambodian patients did not understand or accept the information in translated materials. The patients had no concept of a virus, and were bewildered by the biomedical information. Traditional Cambodian beliefs made the new information incomprehensible in any case, since **patients could not imagine that those who followed the traditional Cambodian rules for maintaining health could contract Hepatitis B.** [This example was provided by the late Donald Himes, a CMS staff member who made valuable contributions to *Writing and Designing Print Materials for Beneficiaries, A Guide for State Medicaid Agencies* (HCFA, 1999). This Toolkit is an updated and expanded version of that Guide.]



Translated text can be too difficult for its intended readers because of problems with the original text, problems with the translation, or differences in reading skills of the English and target language audiences:

- If the original English text is too difficult, the translated text will probably also be too difficult.
- Even when the original text is written in plain English that is easy to read, it can lose this ease of reading in translation. This can happen if translators have not been thoroughly briefed about the reading skills of the audience, or if they lack the ability to write text that is easy for less-skilled readers to understand and use.
- Even when translation preserves the ease of reading found in the English original, the translated text may still be too difficult for the intended readers if their reading skills are more limited than the English readers' skills.





The translation style is unsuitable for the type of document or the intended readers

Some translations are done in a style that is not suitable for the purpose of the document and the intended readers. For example, the style might be too formal or too casual for the document or readers. The *Toolkit Guidelines for Writing and Design* are oriented toward material distributed in the United States. Written with an American audience in mind, the Toolkit guidelines that deal with writing style urge you to use a direct, friendly, and informal style (see Toolkit Part 4, Chapter 3). These guidelines may need some cultural adaptation when you apply them to translated text. For example, for some languages and some audiences, it may be important to show respect by using a more formal and distant style. To make such adaptation, translators would need to be familiar with the typical social and language patterns of the intended readers.



The translation contains errors that should have been caught

Some translated text contains errors that should have been caught by careful editing and proofreading. There's no substitute for careful editing and proofing of written materials before they go to press. Doing this work is more challenging when it involves translated text because editors and proofreaders must be bilingual.



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## How can you safeguard the quality of translations?

With limited time and resources, people who work in government agencies and community-based organizations face many challenges when they translate written materials for the populations they serve. It can be hard to judge and monitor the quality of translations, especially if you are only fluent in English. Even staff members who are bilingual or multilingual may not be fluent in all of the languages used in translation of written materials.

Here are two important things that government agencies and community organizations can do to improve and monitor the quality of language translation:

1. **Establish and implement written guidelines for translation methods and for assessing the qualifications of translators.** To help you review your own procedures for translation, this document offers a set of guidelines for translating written materials. We recommend additional resources at the end.
2. **Strengthen your organization’s capacity for translation oversight.** If your organization does a good deal of translation, you may already have an in-house capability to do professional translation of written materials. If not, it helps enormously to at least have some bilingual or multilingual staff members who speak the requisite languages.
  - Of course, language fluency alone does not give you the skills to do competent translation. Neither does training in oral interpretation, since the tasks and skills involved in written translation are quite different from those involved in oral interpretation. If you have bilingual or multilingual staff, consider investing in training that prepares them to take a more active role in translation oversight and quality control.
  - You can also build your organization’s capacity to produce effective translations by developing cooperative arrangements with local community organizations that have close contacts with the audiences you are trying to reach with your translated materials. Such organizations can serve as cultural informants or advisors, and may be able to assist with your translation needs as well.



## Toolkit Guidelines for Culturally Appropriate Translation

With the needs of government agencies and community-based organizations in mind, this Toolkit Part 11 offers step-by-step guidelines for translation. These guidelines focus on ways to exercise quality control over the entire translation process, regardless of the translation method you choose.

Figure 11-b below gives the full list of *Toolkit Guidelines for Culturally Appropriate Translation*. Sections that follow discuss how to apply each one to your translation projects. The examples we use to illustrate these guidelines emphasize translation of an English text into Spanish, because Spanish speakers are the largest language group among Medicare, Medicaid, and CHIP enrollees. (According to the 2000 Census, about one in ten people in the United States speak Spanish at home. Of all people who speak a language other than English at home, about 60 percent speak Spanish.)

To help you make practical choices based on budget, time, and staff resources, and other considerations, we suggest different ways to accomplish some of the key tasks, such as different ways to review the translated text. While following a set of carefully-considered procedures will help ensure the quality of translations, we emphasize the crucial importance of using reactions from the intended readers as the ultimate test.

### Figure

11-b. Step-by-step guidelines for translating written materials.



#### **First, consider whether it is appropriate to translate the material.**

- Is written material a good choice for the intended audience? Do they have the reading skills in their native language? Is the native language mainly an oral language? Do they prefer other methods of communication?
- Are there any translated materials already available that might meet your needs?



#### **To prepare for translation, review the English text.**

- To get a good translation, start with a good text in English. For example, does the English text follow the *Toolkit Guidelines for Writing and Design*? Are there ways to improve the English text before it is translated?
- Then identify terms and concepts that may be challenging to translate.



**Decide what method you will use for the translation.**

- You can write the material independently in each language, which helps ensure cultural appropriateness and makes translation unnecessary.
- Or, you can do a “one-way” translation from English into the target language, using one or more translators.
- Or, you can do “two-way” or “back translation,” where one person does the initial translation, and a different person translates it back into English. Then as a check on the translation, you compare the original English and back-translated English.



**Plan how you will format the translated text.**

Decide whether to use a single or dual-language format, and how you will integrate the translated text with other parts of the material. You can use the *Toolkit Guidelines for Graphic Design*, making cultural adaptations as needed.

- Allow extra space for translated text (it often takes more words in most other languages, compared to English).
- Allow extra time for formatting text in languages that read from right to left.
- Translated materials need bilingual or multi-lingual text to alert readers that versions are available in other languages, and a label in English that identifies the title, language, and date of translation for reference by those who speak English.



**Use professional translators who have the cultural knowledge and the skills needed to do a good translation.**

- To produce a culturally appropriate translation that is easy for the intended readers to understand and use, use translators who have the necessary writing skills and cultural knowledge.



**Give the translator clear instructions and background information, including guidance on translation issues.**

- Discuss the material and the audience with the translator, giving guidance about how to translate potentially problematic concepts and terms.
- Go over the technical details related to fonts, software, and formatting requirements.



**Translate for meaning (rather than word for word), in a culturally sensitive way.**

- Translation should preserve the content and meaning of the original text, with cultural and linguistic adaptations as needed, so that the translated text sounds natural and is easy for the intended readers to understand and use.



**Review the translated text for accuracy, cultural and linguistic appropriateness, and ease of use.**

- Use multiple reviewers to check on the adequacy of the translation.
- If possible, get reactions from intended readers.



**Use an independent editor to review and polish the translation.**

- Like the translator, the editor needs to be a skilled writer who is familiar with the culture and language patterns of the intended readers.



**Use an independent proofreader as a final check on the translation.**

- The person who does the final proofreading needs to check both text and design elements of the translation.



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## Does it make sense to translate the material?

Government agencies and other organizations are required to translate certain materials. In situations where translation is not required, you may want to start your project by reviewing your goals and thinking about how well a translation would work for the intended readers.



First, consider whether it's appropriate to translate the material.

Is written material a good choice for the intended audience? *(Do they have the reading skills in their native language? Is the native language mainly an oral language? Do they prefer other methods of communication?).*

Are there any translated materials already available that might meet your needs?

As summarized in Translation Guideline #1 shown above, there are some important things to consider when you are deciding whether to translate written material from English into other languages:

- **Take into account whether those with limited English proficiency are able to read in their native language.** Before you invest time and resources in translation, it's wise to check on the literacy skills of those you are trying to reach with your translated materials. Just because people *speak* a language does not necessarily mean that they can *read* in that language. Instead of trying to generalize about the readings skills of people who speak a particular language, think about the specific readers that you are trying to reach who speak that language. There is often great variation in native language reading skills among people with limited English proficiency.
- **For languages that are oriented mainly toward oral communication, written translations may not be feasible or may be of little use.** Some people with limited English proficiency speak languages for which there is no widely used written equivalent, such as Haitian Creole and Hmong. A written version of Hmong was devised by French missionaries in 1955 mainly for religious and bureaucratic use, and Hmong immigrants in this country continue to rely mainly or exclusively on their spoken language. For example, many first-generation Hmong people in Minneapolis-St. Paul routinely use small tape recorders to “make notes” to themselves in Hmong as they go about their everyday lives, including during their dealings with government agencies (personal communication, Melissa Barker).
- **Keep in mind that written materials are often less effective than other methods of communication for some audiences and some purposes.** Some people who can read prefer to get their information in a format that doesn't involve reading. For example, communications specialists often recommend radio as a good way to reach Spanish-speaking audiences. Many older adults who can read prefer to get their information about Medicare by talking with someone, such as calling the 1-800-MEDICARE helpline or talking with a State Health Insurance Program counselor.

- **Check to see if there are any translated materials available that might suit your needs.**  
If your materials cover topics of broad general interest, such as patient education leaflets, you may be able to find suitable materials in different languages. There are many good sources of health-related materials written in languages other than English. Many of these materials have been translated from English, but some have been developed directly in other languages. Check with local sources such as refugee and immigrant organizations, programs for English as a second language, public and college libraries, the State Department of Health, and local health care organizations to see if they have translated materials available. Since many materials are available on websites, one of the best strategies is to use a search engine on the Internet. This works especially well for tapping into national and international sources as well as local ones. Try putting a message out to colleagues on one of the Internet discussion groups, such as NIFL-HEALTH list serv (see resource section at the end of this document).

## To get a good translation, start with a good text in English

As shown below, the next translation guideline reminds us that getting a good translation is much more likely when you start with a good original. Take the time to review the English material carefully before you submit it for translation. If it is not accurate and well written, you can expect either to have long conversations to clear up confusion, or to receive a poor translation.



To prepare for translation, review the English text.

To get a good translation, start with a good text in English.  
*(Does the English text meet the guidelines on the Checklist for Writing and Design? Can it be improved before translation?)*

Then identify and discuss translation issues, including terms and concepts that will require cultural or linguistic adaptation.

To help with your review of the English original, you can use the Toolkit Guidelines for Writing and Design (see Toolkit Parts 3, 4, and 5). These guidelines identify features of writing and design that make written materials easy for readers to understand and use – *whatever their language*. Many of the guidelines specifically address issues related to making written material culturally appropriate for the intended readers.

To help prepare for translation, examine the content of your English original for terms and concepts that need to be explained more fully or in a different way when they are translated in order to make sense to

people with limited English proficiency from another country or culture. If your material includes concepts that require a lot of explanation or visual display of information, using another method such as video may be more effective than translating written materials.

To identify topics that need additional explanation or clarification, draw on your knowledge of the intended readers. For example, suppose that the written material tells enrollees in a Medicaid managed care plan when and how they should use the emergency room. If this material is translated for people from countries where emergency care is handled in a different way, the translation should make cross-cultural comparisons to help readers understand the difference between what they are used to and the program rules that apply in this country. In many South American countries, for example, people are used to receiving hospital care for free, because hospitals belong to municipalities or states. If recent immigrants from these countries get sick, they automatically go to the hospital because they don't know how the American system works (personal communication, Mercedes Blanco). To guide cultural adaptations of your materials, seek specific advice from members of the intended audience and/or informants who are familiar with the audience, and discuss strategies for dealing with translation challenges in your initial consultation with the translators (see Guideline # 6 below).

## Choose a method of translation



Decide what method you will use for the translation.

You can write the material independently in each language, which makes translation unnecessary.

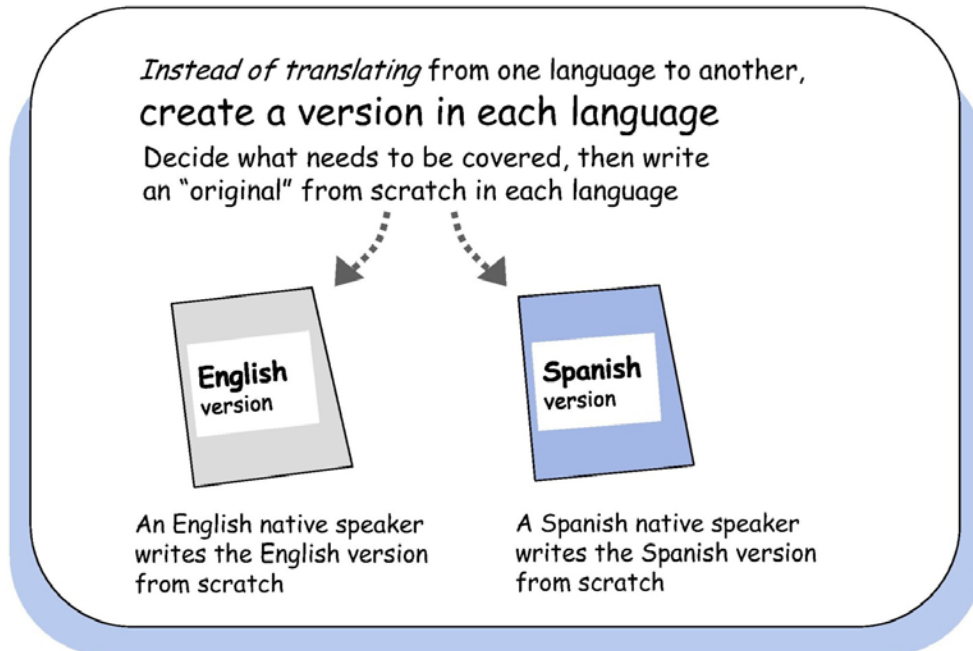
Or, you can do a “one-way” translation from English into the target language, using one or more translators.

Or, you can do “two-way” or “back translation,” where one person does the initial translation, and a different person translates it back into English. Then you compare the original English and back-translated English.

In this section, we use an English-Spanish example to explain and compare the different methods of translating written material. Instead of recommending a particular method of translation, we discuss the advantages and disadvantages of the common methods. **How you *implement* your method is more important than the method you pick.**



ONE APPROACH: ***Create it separately in each language.***



This first approach is not actually a method of translation. Instead, **this method makes translation unnecessary.** Here is how it works:

- **Create specifications for the material by defining its purpose and describing its content and the intended readers.** The project team that is responsible for producing the written material in multiple languages discusses what they want to accomplish with the material and what it needs to say. They also describe the cultural background and reading skills of the intended readers in each language, as well as any other characteristics that are relevant to the written material. Then the team gives the set of specifications and information about the intended readers to the writers who will be drafting the material in each language.
- **Working from these specifications, writers of the different languages work independently to produce a version in their respective language.** Since each version in a given language is developed individually from the same set of specifications, each is an “original.” There is no translation of text from one language into another.
- **The various language versions are reviewed and revised to create the final materials.** Typically, writers and the project team compare versions and make adjustments as needed. Each language version is checked to see how well it meets the specifications for the material. Sometimes this approach includes independent assessments by outside reviewers.

When final revisions are completed, the last step is copy editing and proofreading of the final text in each language.

Many translation specialists see this approach of creating the material separately in each language as the ideal method for producing materials in multiple languages. Creating an “original” in each language sidesteps the struggles and compromises inherent in the translation process. Instead of trying to reproduce the meaning of an English text in a different language, writers are free to concentrate on expressing specified content in a culturally and linguistically appropriate way in their native language.

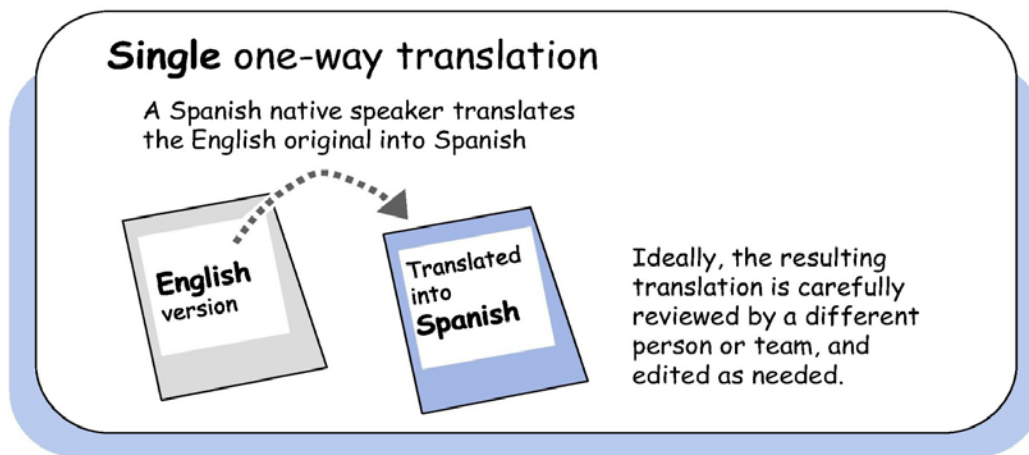
**Creating an original in each language requires writers, not translators.** Writing text from scratch takes different skills than translating an existing text, and writing from scratch can be more time consuming and expensive. It can be hard to find writers who are good at creating health-related, culturally sensitive text that is easy for less-skilled readers to understand and use. In addition to the potential for added time and expense, some are reluctant to use this approach for legal documents, because the text is free to vary considerably within each language.

**Despite the merits of this approach, it is seldom used.** People tend to assume that creating separate originals in each language would cost more than translating from English into other languages, but the *cost comparisons are misleading if the cost of producing the original in English is not included for both options*. Force of habit may be another reason this method has received relatively little attention. People tend to be ethnocentric about their own language, so we tend to think in terms of creating something in English first, and then translating it.

If you have not yet created an English version of your written materials, consider using this method. If good writers are available, it may be faster and less expensive than working through all of the steps involved in developing, reviewing, and editing of translated text, especially if the terminology and concepts in the English original are unfamiliar to the people who will be reading the translated text.

ANOTHER APPROACH: **One-way translation (single or multiple).**

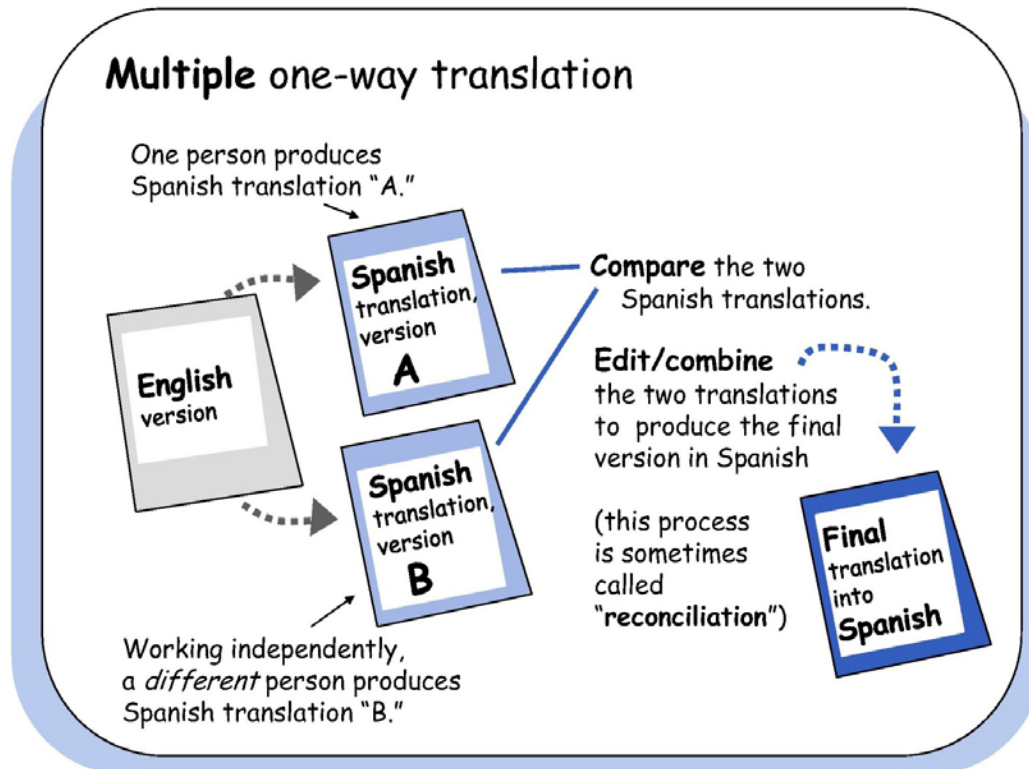
One-way translation involves translating the English text into another language: As shown below, you can do this as simple “single” one-way translation, using only one translator:



**Single one-way translation** is the simplest and least expensive method, because there is only one translator. While this method is widely used because it is the most expedient, it is typically criticized as relying too heavily on the cultural understanding, language fluency, and writing skills of a single individual. Some of the guidelines we discuss later in this chapter address this concern in several important ways:

- Guideline # 5 emphasizes the need to hire skilled professional translators, and our discussion gives suggestions about how to find translators with the right qualifications.
- Guidelines # 8, 9, and 10 call for the involvement of additional bilingual people who are familiar with the cultural and language patterns of the intended readers. These additional people include one or more who review the initial translation, as well as one to serve as editor and another to serve as proofreader.
- Guideline # 8 recommends using feedback from the intended readers as the ultimate test of translation quality, whenever circumstances permit.

If you do one-way translation using more than one translator, it’s called “multiple” one-way translation. This approach is depicted below:



**Multiple one-way translation.** Instead of having just one person do the translation from English into the other language, you can have two (or even more) people do independent translations, then compare the results and reconcile any differences that exist to produce a final version. The comparison-reconciliation can be handled in various ways that may include discussions with the translators, committee review, and final decision making by a third translator or an editor.

If you are planning to use one-way translation, consider whether it is worth the added time and expense to use more than one translator to do it. While it sounds better in theory to have two translations to compare, much depends on the skill and cultural knowledge of the translators you select.

What’s crucial is the **adequacy of the translation**, not the number of different translations that are done.

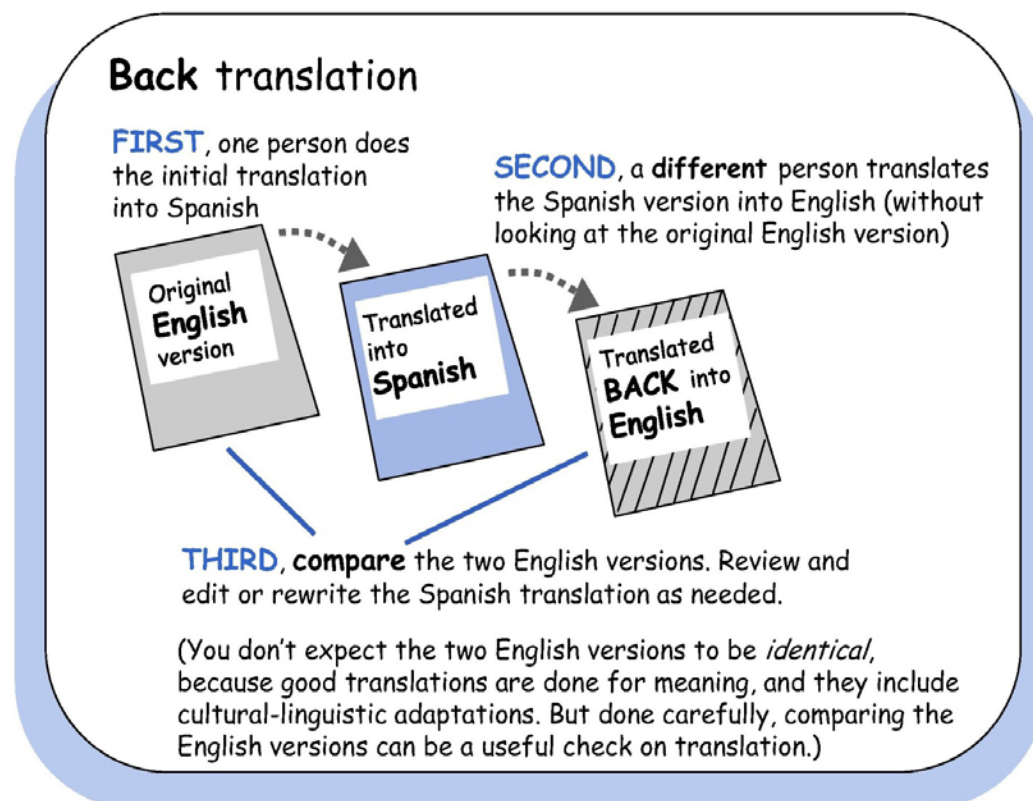
Take into account the extra time it can take to compare and discuss differences in two translations, as well as the cost of the extra translation, and what benefits you may gain:

- If one translation is competent and the other is not, you will have paid for an additional translation that is not useful.
- If both translations are competent but differ in small ways, a group can waste time discussing nuances of translation that don’t really matter. Much as in English, trying to write or wordsmith text in another language “by committee” can be time-consuming and frustrating to everyone.

Provided that you have a culturally knowledgeable and skilled translator, and a good review process (such as the one we describe later in this chapter), a single one-way translation may be perfectly adequate. When you have a second person with the requisite skills and cultural knowledge, it may be more cost-effective and efficient to have that person serve as a reviewer of the initial translation, rather than having the person do an additional full translation.

### ANOTHER APPROACH: **Two-way or “back” translation**

Two-way translation, or “back translation,” is often recommended by translation specialists:



As shown in the illustration above, this approach involves translation in both directions. First, the text is translated from the source language into the target language, and then it is translated *back* into the source language for comparison with the original text.

The two translations are done independently, by different people. Ideally, both are unaware of whether they are doing the initial translation or the back translation.

Comparing the original English text and the back-translated English text can help identify inconsistencies, mistranslations, and other problems. However, the comparison must be done with care, keeping the following points in mind:

- **The back-translated English text will hardly ever match the wording of the original text.** Sometimes people may want to reject a translation because the back translated text is not exactly the same as the original English text. In fact, they should not expect the two versions to use exactly the same words. Instead, when translations are done for meaning rather than word for word, the *comparison of the English versions should be based on whether the back translation covers the same content and preserves the meaning of the original text*. Sometimes the back-translated text will contain some additional content that was added by the translators to clarify a concept or term that is unfamiliar to the readers of the translated text. This discrepancy from the original text would be the mark of a culturally appropriate translation, rather than a cause for rejecting the translation.
- **Reviewing the back-translated English text is no substitute for a close review and editing of the translated text.** Just because an English back translation preserves the meaning and content of the English original does not mean that the translated text is well written and easy for its readers to understand and use. Skilled translators can often improve on the style and clarity of the original text when they write a translation. It may be that the person who did the back translation produced a gracefully worded English text from a poorly worded Spanish text with spelling and punctuation errors.

While we have been focusing on formal back translation of an entire document, back-translation is also used in other ways:

- **Back-translation can be done verbally**, rather than in written form.
- **Back-translation is sometimes selective.** In some situations, it makes sense to focus back-translation on selected portions of text, rather than spending resources on a complete back-translation. For example, you may want to back-translate a couple of passages that were especially challenging to translate, as a measure of quality control.
- **Back-translation is a handy way to share the meaning of translated text with people who don't speak the translation language.** For example, later on in Figure 11-e on page 37, there is

an example that shows a cultural adaptation in Spanish. At the end, the adapted text has been “back translated” into English to show you its meaning.

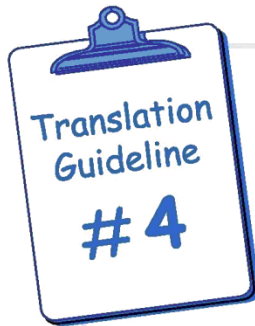
Two-way translation tends to be more time consuming and more costly than one-way translation. It usually takes longer than a single or multiple one-way translation because the person doing the back translation can’t get started until the initial translation has been completed.

To make the best use of available resources, you may want to use different methods of translation depending on the material and its purpose. For example, it may be important to include a full and formal back-translation when you translate legal documents, but you may decide to skip it for patient leaflets.



## **Plan how you will format the translated document**

As shown in the guideline below, there are many decisions related to formatting your translated document. Since some of them affect the instructions you give to the translator, as well as the arrangements you will need to make for graphic design and printing, it makes sense to think about formatting at an early stage. Keep in mind that formatting is not explicitly part of the translator’s responsibilities, though many translation companies make arrangements with graphic designers to format their client’s work, for an additional charge (MAXIMUS, 2005:94).



### Plan how you will format the translated text.

Decide whether you will use a single or dual-language format, and how you will integrate the translated text with other parts of the material.

Just as with English materials, you can check translated text using the guidelines for the writing and design (for the full list of guidelines, see Part 3 of this Toolkit). Allow extra space for translated text, because it often takes more words to say the same thing in other languages compared to English. Allow extra time for formatting text in languages that read from right to left.

Label the original and each translated version to tell readers how and where to get the same information in a different language.

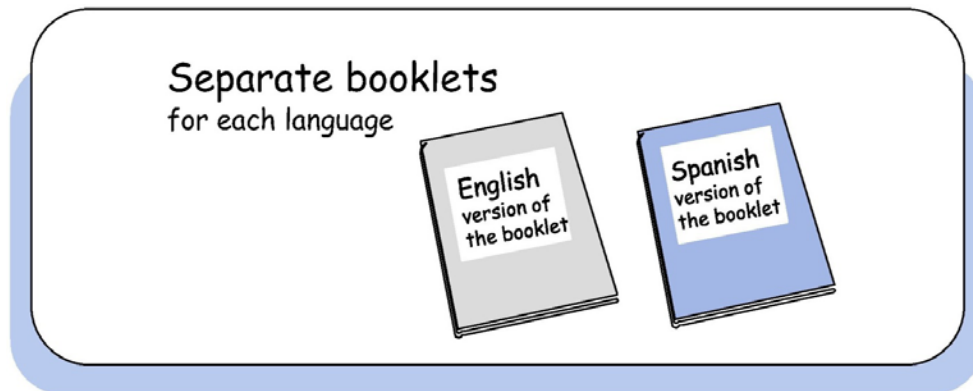
To help English speakers who distribute the material, include a notice *in English* that gives the title and name of the language.

When you are considering how to format your translated material, one decision is whether to package and distribute the translation separately (“single language format”), or to package and distribute it together with the English version (“dual language format”). Consider also whether any of the photographs, illustrations, or other visual elements need adaptation to make them more culturally appropriate for your readers of the translated versions. For help with this, see Toolkit Part 5, Chapter 6, *Guidelines for use of photographs, illustrations, and clip art*. As with any cultural adaptations of content, be guided by advice from members of your audience, the translators, and other informants about revising visual elements of your translated materials.

### ***Single language formatting is one option***

As shown in the illustration below, separate packaging of each language version is a simple and common choice for formatting of translated materials.





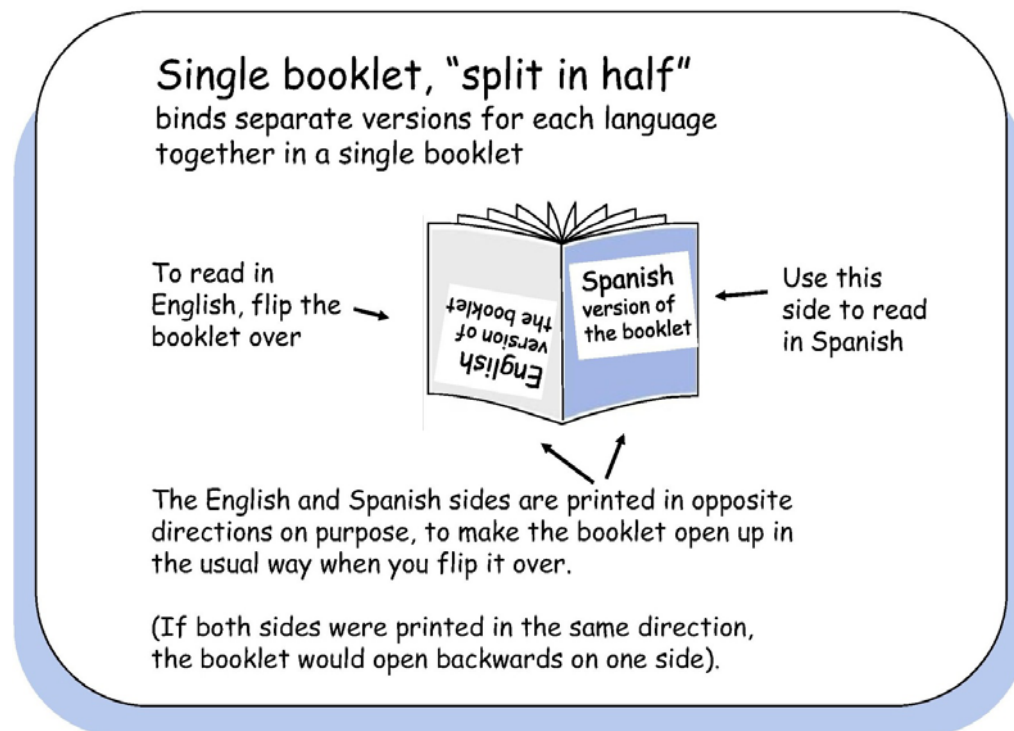
**The single language format has several advantages.** Readers generally like it, and it looks less intimidating at first glance because it is half as long as the dual-language formats that cover the same information twice, once in each language. The single language format is very flexible, since you can format each version independently to accommodate any differences in length and graphic elements.

**Distribution can be challenging.** Matching up the correct language version with the people who read in that language can be difficult, especially since many state Medicaid agencies, managed care organizations, and other groups have difficulty identifying the language translation needs of the people they serve.

If you want to use the single language format, consider whether you can accurately identify the language needs or preferences of the intended readers, and whether you have a cost-effective and reliable way to deliver the right language version to the right people. Otherwise, it's hard to know how many copies you will need of each version, and distribution can be costly, frustrating, and ineffective.

### ***Dual language formatting is the other option***

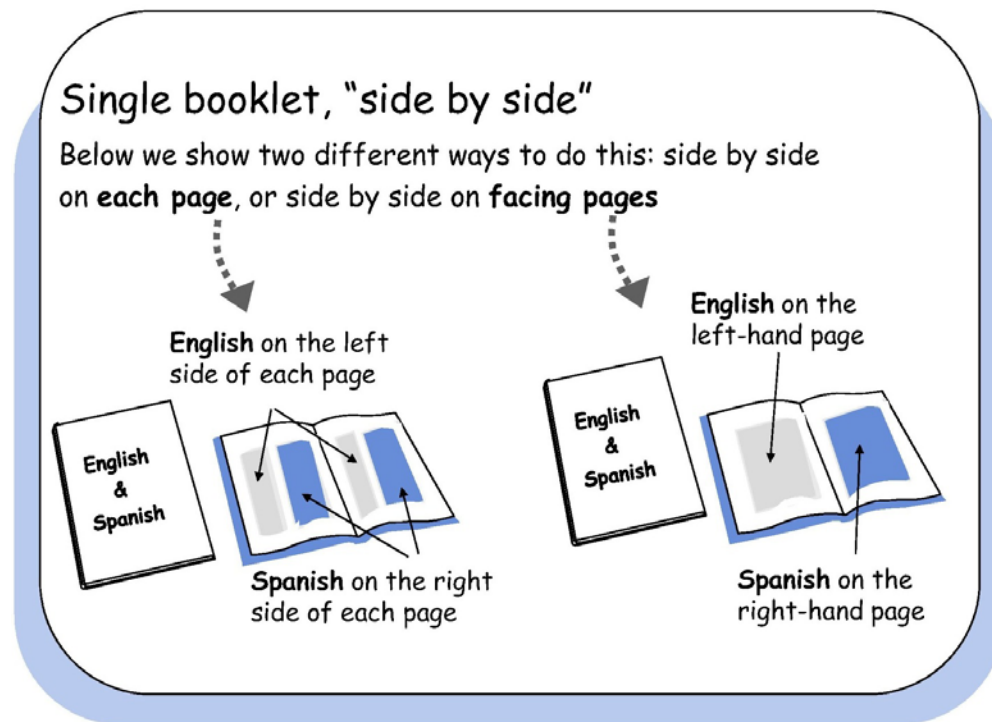
If you combine the two languages, there are two common ways to handle the formatting. The first, shown below, is a “**split in half**” approach that devotes each half of a booklet, leaflet, or information sheet to a different language. In this split-half approach, you see the other language when you flip the booklet or brochure over.



If you use the split-in-half approach, it’s **crucial to label each side clearly** to alert readers that a different language is on the back side.

- For example, the English cover should have a label written in Chinese that tells readers to turn the booklet over for Chinese, and vice versa.
- This need for labeling seems obvious, but materials that use the split-in-half format have been published without it. With a fifty-fifty chance of looking at the “wrong” side first, people have tossed these materials when they can’t read the language on the cover – never realizing that all they had to do was flip it over to read it in their own language.

**The other dual language option is to put the languages “side by side.”** As shown below, there are two ways to do this. Either way you choose, it’s immediately obvious to readers that both languages are included.



### ***Advantages and disadvantages of dual language formatting***

Whether you use the “split in half” or the “side-by-side” approach, dual language formats offer several potential advantages:

- **Dual language formats don’t require advance knowledge of language preference, so distribution is simplified.** The dual language format can be useful in situations where the majority of your intended readers speak either English or one other language, because the dual language version supplies the same text in both languages. For example, a Spanish-English booklet would meet the language needs of most Medicaid enrollees in states such as California where a sizeable proportion of enrollees with limited English proficiency speak Spanish. You would not need to know ahead of time which people read in Spanish in order to deliver a Spanish version to them.
- **Dual-language formats offer flexibility in choosing the preferred language.** For example, readers who are learning English can refer to both versions. If a reader needs to get help with the material from someone else, both languages are available to the person who is helping.

There are also some disadvantages:

- **Dual-language formats can be confusing at first.** Unless you live in a country where dual-language formatting is widespread, such as Canada or Switzerland, dual-language materials can take you by surprise. It can take a moment to figure out how to focus on just your preferred language as you read the material. (This tends to be easier with a split-in-half format than with the side-by-side format).
- **Some readers dislike the dual-language format.** While dual-language formats have been successful for many projects, there are some readers who find these formats objectionable and want to see material in their own language only.
- **At first glance, the material may look a lot longer and more imposing than it really is.** When you put both languages together in a single piece of written material, it doubles the length. For shorter materials, this may have little or no impact. But for something that is longer, like a booklet, or a patient satisfaction questionnaire, the material will appear to be twice as long. This added length may discourage or intimidate some people, especially those who are less-skilled readers.
- **Dual language formatting may (or may not) cost more than a single language format.** Sometimes you can save money by using a dual-language format, but often it costs more. Here are things to consider in making a cost comparison:
  - What proportion of *all* readers are likely to read the translated text? If the proportion is small, a single language format for these readers may make more sense and cost less, too.
  - Added length can mean higher postage for materials that are mailed, depending on size of the item and how cut points for additional postage happen to fall.
  - Graphic design tends to be more time consuming and costly for the dual language formats, especially for the side-by-side versions that put both languages on each page. This variation is harder to format because of the two-column format. The column width will likely be uneven, because compared to English, it typically takes more space to say the same thing in most other languages. If the paper is relatively narrow, you can't use this format variation, because splitting the text into two columns makes the columns too narrow for easy reading.

### **General tips for formatting translated documents**



Allow space for “text expansion”  
(translated text tends to require more space than the original text in English)

Whether you plan to produce separate versions of translated documents or use a dual language format, keep in mind that the translated text will likely require more space than the original English text. For example, *The Health Literacy Style Manual* says you should count on a Spanish translation taking approximately 25% more room (MAXIMUS, 2005:94). As explained in this manual (MAXIMUS, 2005:95), there are a number of reasons for text expansion. For example, the text can be longer in translated documents than in the English original if:

- The other language is more descriptive than representative. For example in Hmong many concepts are explained, not represented by a word or phrase.
- The other language doesn't use the standard Western, Cyrillic, and Greek fonts. Examples are Arabic and the Chinese, Japanese, Korean, and Southeast Asian languages.
- The fonts don't correspond in size to the fonts chosen for the original text.
- The translator makes cultural or linguistic adaptations, such as adding explanations or definitions to make the material easier for readers of the translated versions to understand.

This tendency for translated versions to be longer than English versions has important implications for the production and distribution of the translated document:

- Allow extra room for this natural expansion when you do your original planning of design. **You don't want to end up compromising good design in the translated versions** by crowding your translated version into too little space, reducing the size of the type, or sacrificing visual appeal by dropping illustrations, photographs, or other visual elements.
- Check into the possible impact on the overall costs of printing and distribution.



For languages that differ in orientation from English (such as reading from right to left), allow time for reformatting

If you are translating materials into languages that read from right to left, such as Arabic, Chinese, Hebrew, or Farsi, be sure to allow some extra time. This difference in orientation can have major implications for layout of your materials. Keep in mind that the graphic designer who integrates the translated text and the non-text elements may not be able to read the translated text, and will need to rely heavily on others who do.



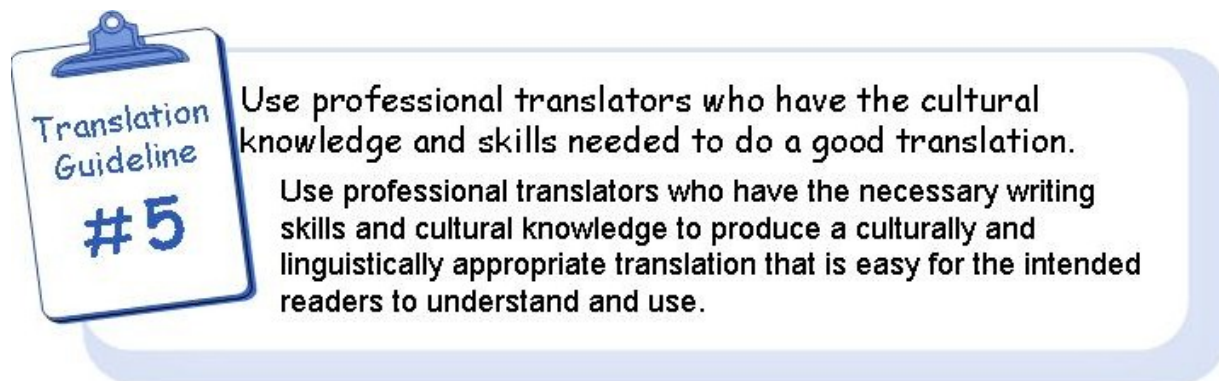
To alert readers and make the translation easier to distribute, label it clearly

Clear labeling of translated materials is crucial. People who need a translated document must be told that it's available and how to get it. In addition, people who distribute the translated material may read only in English, and they need to be able to identify the title and target language of the material.

Here are suggestions for labeling of translated materials:

- On the front of each language version, tell readers about other language versions that are available, and how to get them. This message must be written separately in each of the translation languages. For example, if a leaflet is available in English, Russian, and Vietnamese, the English leaflet should have a notice in Russian on the cover that tells how to get a copy in Russian. It should also have the same notice written in Vietnamese, telling how to get a copy in Vietnamese. Some organizations have a standardized “language block” of multilingual text with these messages that is placed on the front of all translated materials. Be sure to put in a prominent place (not on the inside or the back cover).
- If the material itself is bilingual with each version on an opposite side, put a note on the front of each side that tells readers to turn the material over (for example, a note in English on the Arabic side, and a note in Arabic on the English side).
- To make it easy for English speakers to identify and distribute translated materials, include unobtrusive labeling in English that gives the title, name of the language, and date of translation.

## Use skilled professionals to do the translation



Figure

11-c. Five things to look for in a translator.

- 1. Translators must be able to write well in their native language.** For the types of written materials we discuss in this Toolkit, “able to write well” means being able to write translated text that is easy for people with limited reading skills to understand and use. Here are some things to keep in mind:
  - **Use only professional translators who have appropriate qualifications and training.** Most translators work mainly in one direction, translating into their native language. But for English and any other language, being a native speaker does not automatically make you a good writer or a good translator in your native language. Written translation requires a special set of skills. These skills differ from what’s required to do oral interpretation, so don’t assume that a person who is good at interpreting would also be good at written translation.
  - **Keep in mind that not all professional translators understand how to write well for less-skilled readers.** Translators or translation services that are accustomed to producing translations of business documents or literary works may not be familiar with the needs of low literacy readers, and may produce translated text that is too difficult for members of your intended audience.
- 2. Translators must have enough fluency in English to understand the English text.** Translators don’t need to be highly fluent in English, but they do need to be able to understand the English text well enough to be able to translate its meaning. They also need to be fluent

enough in English to communicate with others about the translation when questions arise or clarifications are needed.

3. **Translators must be familiar with the culture and language patterns of the intended readers.** Cultural and linguistic knowledge is essential because translators need to know how and when to adapt the translated text in a way that preserves its meaning, yet makes this meaning easily understandable to the intended readers. While you will need to brief the translator on the specifics of your materials and their intended readers, there is no way that you can supply translators with all of the taken-for-granted cultural knowledge that they will need to draw on to produce an effective translation.
4. **It is helpful if translators have experience in translating materials that are similar to yours.** If they have done similar work, samples of this work will help you judge their ability to do the type of translation you need.
5. **It is helpful if translators are familiar with the subject matter of your materials.** Familiarity with the subject matter makes it easier to communicate with the translator about the content of the material. Also, the translator may have learned some good ways to handle translation of difficult terms and concepts.



Source: Created for this Toolkit; see acknowledgements at the end of this document.

### ***How can you find translators who meet these requirements?***

It's worth spending some time and effort to do careful screening of prospective translators, because **working with well-qualified translators will produce better results and will save you time and money in the end.** When you are seeking translation services, it helps to know a little about how the translation industry works. Here are some key points that are based in part on the *Translation Protocol* (Minnesota Department of Health, 2000:13-14):

- Translators typically work by translating into their native language only. Even people who are proficient speakers of several languages tend to express themselves best in their native language.
- Translation services are typically priced by the word or block of words. Editing and proofreading services are often priced by the hour.
- The time required for translation varies from language to language and topic to topic. Many translators average somewhere around 10,000 words a week. Allow plenty of time for your translation jobs, so that translators can do their best work.



- Most translators are freelancers who list through agencies or have a very small circle of clients. When agencies accept translation jobs, they typically subcontract the work to a particular translator. The agency manages the project and can usually provide typesetting, editing, and proofreading services, unless you prefer to make other arrangements for these services, such as using an in-house capability instead.

### Figure

#### 11-d Questions to ask when you are screening translators.

When you screen prospective translators, you are seeking information that will help you to judge what it will be like to work with that person or agency, and whether the completed translations will be of suitable quality. Here are some things to ask about when you are screening translators:

- **Ask about the translator’s qualifications and experience.** Ask about areas of specialization, and whether the person has experience in translating for readers with low literacy skills. Keep in mind that translation services are often highly specialized in subject matter or type of translation (such as business documents or literature).
- **Ask if the translator is familiar with the culture and language patterns of those who will use the translated material.** Translators differ in their knowledge of subcultures and ability to adapt language according to locality. For example, if the people who will use a Spanish translation are Mexicans who live in California, try to hire a Mexican translator who lives in California.
- **Ask whether the translator is certified or accredited.** Some translators are accredited or certified by the American Translators Association or other recognized domestic or international organizations such as the Institute of Translation and Interpretation, Société Française des Traducteurs, Defense Language Institute Foreign Language Center, and Association of Interpreters and Translators Quebec, Canada. The American Translators Association (ATA) holds written examinations that lead to certification in a specific language pair and direction (from or into English). For example, a translator might have ATA certification for translating from Russian into English, or from English into French. Keep in mind that the ATA only offers certification in a selected group of languages, which are mostly Indo-European languages. The list of language pairs include both directions for Spanish (Spanish into English and English into Spanish), but limited pairs for Asian languages (English into Chinese, English into Japanese, and Japanese into English). For more information, visit <http://www.atanet.org>.
- **Ask about the technical details.** Describe the format of the English text, and your requirements for the format of the translated text. Depending on the written material and your particular needs, you may need to know about computer hardware, software, specialized fonts, and the ability to integrate graphics and other design elements into the translated text.

- **Ask for names of other clients to serve as references.** Then contact these references and ask about their experiences with the freelancer or agency. Ask about such things as timeliness, flexibility and problem solving, and satisfaction with completed translations.
- **Ask for samples of their work and review these samples to assess suitability of the translation.** Ask for samples that are as similar as possible to the type of material you want to translate, and be sure to get the English original as well as the translated text. Then show these samples to people who have the requisite cultural knowledge and language fluency to assess them. Ask reviewers to tell you if the translated text is easy to read, and to estimate its literacy level. Ask if it stays true to the meaning of the original text, with appropriate adaptations, and whether it is free of grammar, spelling, and punctuation errors. If possible, ask a couple of consumers to read a sample for you. They should be able to tell you the most important messages in the document, and you should be able to see that they are reading without undue struggle.

If you are screening an agency, there are some additional questions to ask:

- **Ask the agency how it recruits, selects, and trains its translators.** Ask for details about how the agency selects its translators. What qualifications do they look for? Do they administer tests or require samples of work before they entrust a job to a translator?
- **Ask what procedures the agency follows to monitor the quality of the translations.** For example, does the agency have written guidelines for its translators? What methods of translation does it use, and why? Does it have its own editors and proofreaders? How do agency staff members check the translation before sending it on to the client? Agencies that do careful work will welcome questions about their quality control procedures and will have answers readily available.



Source: Created for this Toolkit; see acknowledgements at the end of this document.

### ***Should you use an agency or a freelance translator?***

Careful screening is more important than whether you choose an agency or a freelance translator, since either can provide good services.

- Translation agencies typically charge more for translations than freelancers do, because agencies supply a number of additional services. It may be worth paying more to have the agency supply qualified translators, monitor the quality of their work, and coordinate the whole process to keep your project on track.

- Using a freelance translator will generally cost less, and you will be able to deal directly with the person who does the translation, rather than going through the agency. You can sometimes get more personalized attention by working with an individual rather than an agency.

## Give the translator clear instructions and a full briefing

As shown in the next guideline below, you can help your translators do their best work by giving them clear instructions and plenty of background information about the material itself and the intended readers.



### Give the translator clear instructions and background information, including guidance on translation issues.

- Discuss the material and the audience, giving guidance about how to translate potentially problematic concepts and terms.
- Go over the technical details related to fonts, software, and formatting requirements.

If possible, meet in person for the initial briefing on a new translation project. Let the translator know what you expect, and what you will be checking for in your quality control process. Be sure that he or she understands the need to produce text in the target language that is written clearly and simply, at an appropriate reading level.

Here are some suggestions for working effectively with translators:

- **Urge translators to ask questions.** They should feel free to contact you if they are unclear about the meaning of the English text, or want to consult with you about any terms or concepts that seem awkward or difficult to translate. Be sure that someone is available to provide a prompt response to questions or any other translation issues that arise.
- **Give them a translation glossary to show your preferred ways of translating words, terminology, and concepts that occur frequently in your written materials.** Creating your own custom glossary will help maintain consistency in your materials and will help translators produce culturally appropriate language that you will find acceptable. Here are some suggestions:

- Update your custom glossary with new entries after each translation job. You should also edit and expand it to reflect any programmatic changes or other changes that affect translated materials.
  - It’s especially helpful to include a brief commentary that gives the rationale for a particular translation preference. You can include comments about alternatives that were considered but rejected, if appropriate. Sharing this information with your translator at the outset will make the process more efficient for everyone.
  - Besides providing translators with a great head start on understanding the material and the needs of readers, a custom translation glossary is a handy way to keep a running record of your deliberations and decisions about challenging translation issues. This running record helps new staff members get up to speed.
  - These suggestions emphasize creating a customized glossary that reflects your organization’s own experiences and judgments about the best ways to translate certain words or concepts for your intended readers. There are cross-cultural glossaries of medical terms available, but be cautious if you use them. Just because a translation is given does not mean that the translated term will be understood by your intended audience. Many of these glossaries are written at a high reading grade level that is more suitable for health professionals than for the public. Even if the translated words are not difficult, they may be unfamiliar to the intended readers, and it may work better to give an explanation than to simply substitute the translated term.
- **Share feedback with them (and with the agency, if applicable).** If you are delighted with the quality of a translation, let them know. If reviewers have been critical of the way the material was translated, talk with the translator about the specific concerns in a professional, nonjudgmental way. Producing a culturally appropriate translation is a complex process that involves many decisions. You can learn a lot by giving the translators a chance to comment on reviewers’ feedback and to explain the translation choices they made.

## Translate for meaning (rather than word for word), in a culturally sensitive way



### Translate for meaning (rather than word for word), in a culturally sensitive way.

Translation should preserve the content and meaning of the original text, with cultural and linguistic adaptations as needed. The translated text should sound natural and be easy for intended readers to understand and use.

### ***Good translation requires cultural and linguistic adaptation***

This translation guideline goes to the heart of what constitutes effective translation: a good translation recreates the intended meaning of the English text as closely as possible in the target language, in a way that makes sense to the intended readers.

To transform English text into clear and meaningful text in the target language, translators need to be familiar with cultural and linguistic nuances of both English and the target language. This will help them make good judgments about when and how to adapt the translated text. Adaptation is so crucial to effective translation that some people prefer to call the process “*adaptation* into another language” rather than “*translation* into another language.”

When text is translated, it may need adaptation for one or more of the following reasons:

- **To make the translated text sound natural to the intended readers.** Sometimes you can tell that a text has been translated into English, because the sentence structure and grammatical forms sound awkward and strange, as if they belonged to a different language. Good translators adapt text to make it sound smooth and natural to native speakers of the translated language.
- **To make the translated text easier for the intended readers to understand and use.** Ideally, the translator will be starting with a good text in English (see Translation Guideline #2). If the

English text is a good match to the reading skills of those who will use the translated text, then the translator just needs to preserve the ease of reading in translation. But sometimes the English text is difficult, or the readings skills of those who will use the translated text are very limited. In these situations, translators need to make adaptations, such as simplifying the vocabulary and sentence structure, and adding examples or explanations.

- **To make the translated text culturally and linguistically appropriate for the intended readers.** As we’ve already noted, communicating the meaning of an English text clearly and accurately in another language can be a huge challenge. Some English words, phrases, and concepts have no direct equivalent in the target language. Other words and concepts can be translated in multiple ways, each of which carries a different meaning. As the Minnesota Department of Health translation guidelines emphasize, any text to be translated contains implicit, or unstated meaning, as well as the explicit, overtly stated information (*Translation Protocol*, 2000:8-9). Part of the translator’s task is to identify these implicit meanings and decide how to convey them to readers of a different language that has different taken-for-granted cultural and linguistic complexities. The rest of this section discusses a few aspects of cultural and linguistic adaptations in more detail, with examples.

### ***Choosing which word or phrase to use in the translated text***

There is often more than one way to translate a particular word, and each may have a different meaning. A skilled translator who is a native speaker, and who is familiar with the intended readers, will generally know which words to choose for a particular meaning and context. The review process that we describe in the next section will also help catch any problems with word choices.

Here are some suggestions about making cultural and linguistic adaptations in word choices:

- **Watch out for words that look similar in English and the target language, but don’t really mean the same thing.** The Spanish word “aplicacion” looks like the English word “application,” but it actually means “assignment” in Spanish. If you want to refer to an application form in Spanish, you would say “solicitud” rather than “aplicacion.”
- **Be alert to figures of speech, colloquialisms, and other expressions that need special care in translation.** If idioms or informal expressions of casual speech appear in the source text, translators first have to grasp the intended meaning in English, then figure out the best way to say essentially the same thing in the target language. Doing a good job at this requires an understanding of culture and language patterns in both languages. Since you can’t figure out the meaning of an idiom just from knowing the meaning of each of its words, idioms are especially prone to mistranslation if the translation is done literally rather than for meaning. Imagine, for example, how bewildering the results might be if you did a word-for-word translation of

expressions such as “give way,” “short and sweet,” “hooked on drugs,” or “you’ll start feeling better down the road.”

- **To deal with regional and other variations in word use, consider including alternative words in parentheses.** For example, depending on their country of origin or where they live in the United States, Spanish speakers might use different terms for the same thing. Eye glasses are called *espejuelos* in Puerto Rico, *gafas* in Venezuela, *anteojos* in Argentina, and *lentes* in Chile. If you were developing materials in Spanish for use by people in California, you would orient the translation toward Mexican terminology. If the materials were for use by people in New York, you would orient the translation toward Caribbean terminology. If Spanish-language materials will be used nationwide, you could make the translation as generic as possible, or include important regional variations in parentheses. If you have questions about which words to use, be guided by feedback from cultural informants and intended readers.
- **Take into account the extent to which the intended readers have adapted to the culture and language patterns in this country.** As you make translation choices, consider what mix of people with limited English proficiency you are trying to reach. Some of your intended readers with limited English proficiency may be recent immigrants who are unfamiliar with American culture and language patterns, while others who have lived in the United States longer may have adapted to parts of American culture and language. Sometimes the local immigrant community adopts English words and phrases. Take the word for carbonated beverage as an example. On the East coast, Americans say “soda,” and in the Midwest, they say “pop.” The word is “gaseosa” in Spanish, but some Spanish speakers living in the United States have adopted the word “soda.” Similarly, some Spanish speakers say “nurse” rather than using the Spanish word “enferma.” An example of regional language adaptation is the use of English-nuanced Spanish called “Tejano” (“Tex Mex”) that has developed among Chicanos who live in some towns along the Mexican border.
- **For ease of reading, choose the simplest word when there is more than one good choice in the target language.** Just as in English, the target language may include multiple words with similar meaning. Faced with choices of this type, translators should pick the simplest words that stay true to the English text, to avoid making the translated text harder for people with low literacy skills to understand and use. It helps to hire translators who understand the need to write in plain language, and have done it successfully. For example, a translator who specializes in business translations may not appreciate what it takes to communicate effectively with less skilled readers.
- **To maintain consistency and make future translations more efficient, compile your own custom translation glossary.** A translation glossary is a useful tool for your organization as well as for the translators you use. For more about this, see the discussion above about briefing your translator. Note that we are recommending a glossary for staff use only. We don’t recommend

putting glossaries into written materials for less skilled readers, because they seldom use them. Instead, the material should incorporate definitions into the text right where readers need them, which makes a glossary unnecessary. For more on this topic, see Guideline 3.4 in Toolkit Part 4, Chapter 3, *Guidelines for writing style*.

### ***Translating words and concepts that are unfamiliar to readers of the target language***

When English words, phrases, and concepts have no direct equivalent in the target language, translators need to adapt the text – as best they can – to make sense to the intended readers. Here are some issues and suggestions to consider:

- **Sometimes you may need to help readers learn the new word or acronym in English, because they will hear it repeatedly in English.** “PCP” for “Primary Care Provider” is a possible example. To help readers learn the new word, you need to define the term such as PCP in words they understand, and reuse it in English, including the translated definition in parentheses to help reinforce the learning.
- **Adding specific cross-cultural comparisons can be very helpful.** As shown below in the example in Figure 11-e, it can help a lot to make explicit comparisons to the reader’s own experiences and frame of reference.



Figure

11-e. Example of cultural adaptation in Spanish translation  
(adding a cross-cultural comparison).

Here is an example of English text (from a booklet on understanding managed care) that is adapted:

Health Care Is Changing in the United States: In the past, your health insurance may have covered all services. Today it is very important to know what your plan will and will not cover.

Spanish adaptation --

El cuidado de salud está cambiando en los Estados Unidos. Anteriormente el seguro cubría todos los servicios. Hoy en día es importante saber qué está cubierto y qué no está cubierto, antes de usar un servicio. Tenga presente que en los países latinoamericanos los seguros de salud son diferentes. En algunos países de latinoamerica los doctores todavía hacen visitas a domicilio, esto no existe en Estados Unidos. Pregunte antes de usar un seguro de salud.

The Spanish version above reads: "In the past, the health insurance covered all services. Today it is very important to know what is covered and what is not covered. You must have in mind that the health insurance in Latin America is very different. For example, in some Latin American countries, doctors still make home visits. This service does not exist in the United States. Ask questions before using your health care plan."

Source: "Lost in Translation: Each Word Accurate, Yet..." by Christina Zarcadoolas and Mercedes Blanco, *Managed Care*, August 2000, pages 2-3 of 4.  
<http://www.managedcaremag.com/archives/0008/0008.translate.html> (accessed on September 11, 2006). Used with permission.

## Review the translated text for accuracy, cultural suitability, and ease of use



Review the translated text for accuracy, cultural and linguistic appropriateness, and ease of use.

Use multiple reviewers to check on the adequacy of the translation, and get reactions from intended readers too, if possible.

When the translation is complete, the next step is to have other people assess it. How you handle this review phase of translation depends on many factors that include the time and resources you have available, as well as the material itself and the intended readers. If the translated material is short and simple, and you are using a translator who has done good work on previous translations of a similar type, the review may be brief. You will want to put more time and effort into the review if you are using a new translator, or the material is long and complex, or you suspect that the intended readers may have trouble understanding its content.

### ***Tips for reviewing the translation***

To provide a thorough review from different perspectives, try to get reactions from a variety of reviewers. If you do numerous translations, it may be more efficient to set up a standing review committee of people who represent different expertise and perspective than to assemble reviewers each time you produce a new translation.

- **You may have in-house staff members who have the language fluency and other skills needed to review the translation.** If possible, try to involve staff from different areas of the organization. For example, your review team might include a person who does community outreach, another who works on the telephone helpline, and a third who helps create information materials.
- **The best way to judge how well the translation is working is to get some feedback directly from your intended readers.** While they can't assess the clinical or legal accuracy of the materials, members of the intended audience are the ultimate judges of whether the material is

culturally acceptable and easy to understand and use. For help with this, see Toolkit Part 6, *How to collect and use feedback from readers*. As we emphasize in Toolkit Part 6, you do not have to spend a lot of time and money to get reader feedback, and the benefits will be enormous. One quick and inexpensive way to get feedback from readers is to do brief interviews with them in settings such as community centers or waiting rooms at local agencies. People are typically grateful to see that material has been translated into their own language, and happy to help by sharing their feedback. Even if you can only do three or four interviews with readers, you will learn a lot.

- **If you can, get help from community-based organizations, government agencies, and other local organizations that serve the people you are trying to reach with your translated materials.** Organizations in your own community are great resources and excellent partners in projects that include translated materials. These organizations may have bilingual staff members who can review the translated text and give you feedback based on their experiences with the intended readers. If you are doing feedback sessions with intended readers, as recommended above, these organizations may be willing to help with recruitment.
- **Translated materials that will be used across dialect subgroups should be reviewed by representatives from each of the subgroups.**
- **Some translated materials require specialized review by legal staff or other departments.** Some types of materials such as application forms, legal notices, and descriptions of benefits and services, and patient education material, require special scrutiny. For example, you may need to get clearance from an attorney, an assessment of clinical accuracy from a physician, or approvals from other specialized reviewers. Typically, you will need to provide a back-translation into English for these purposes, since many specialized reviewers will not be able to read the translated text.
- **Other possibilities for your review team include freelance translators and translation agencies.** For example, if in-house staff members have done the initial translation, you might want to seek assistance at the review stage from other translation professionals in your community.

### ***Using the feedback from reviewers***

How you process the feedback you get from reviewers depends on your project and the nature of the feedback you get. If comments and edits are minor, they can be handled by the editor (see Translation Guideline # 9 below). If there are serious concerns about the adequacy of translation, or serious disagreements among reviewers, you will likely need to meet and discuss the issues. These meetings may include the translator who worked on the text as well as some reviewers. Unless reviewers are skilled, professional translators with the requisite cultural knowledge of the intended readers, be cautious about

how you use specific edits they may suggest. Reviewers may prefer one word over another, but that does not mean that the translation is inaccurate or inadequate.

When addressing feedback from reviewers, focus on major issues that affect accuracy of content or ease of reading, and try not to get bogged down by minor differences of opinion. When a translation controversy arises, consult with the person who did the initial translation. Share the concerns that have been raised by reviewers, and ask for comments and suggestions from the translator. Once reviewers have given their feedback, and translation issues have been discussed, it usually works best to have one person take responsibility for doing the final edits.

## Use an editor to review and polish the translation



*Use a bilingual editor to review and polish the translation.*

Like the translator, the editor needs to be a skilled writer who is familiar with the culture and language patterns of the intended readers.

The editor puts the text in final form, paying special attention to style, grammar, and reading level. You may have someone in-house who can edit the translation, or you can hire a freelance editor or use the editing services of a translation agency.

The editor needs good writing skills and should be familiar with the material and intended readers. To provide diversity of background and viewpoints, as well as appropriate distance for editorial work, the person who serves as editor should not be the same person who did the initial translation. Some people work as translators and also as editors of translated text. Others specialize in one role or the other.

The role of the editor and the type and amount of work that he or she will need to do depends on the nature of the material and the feedback from reviewers. In some cases, the translated text reaches the editing stage in good shape, and only minor polishing is required. Other times, editors may need to do substantial work on the content and writing style to get the text in final form. For example, if there were many differing opinions about how the text should read, the editor will need to make the final decisions and follow through with whatever rewriting or editing is needed. If substantial rewriting is needed at this late stage, it is wise to circulate the final draft to some of the reviewers again for review and comment.

## Careful proofreading is the final step



Use a bilingual proofreader to do a final check on the translation.

The proofreader looks for consistency and corrects any errors in grammar, spelling, punctuation, and formatting.

Use an independent proofreader to check for spelling, grammar, and punctuation – both the English and the translation. Don’t skip this step, because small mistakes in phone numbers or words can turn into big problems. The proofreader should do a final check of the page proofs or other final formatting that will be used in printing, photocopying, or other methods of distribution.

## End notes

### *Acknowledgments for this chapter*

Thanks to all of the people who shared their expertise, offered examples, and gave helpful suggestions for improving this Toolkit Part 11, including Mercedes Blanco, Penny Lane, Melissa Barker, Len Epstein, Tina Wright-Raburn, Chris Zarcadoolas, and staff at government agencies. The discussion in this chapter reflects the Toolkit writer’s compilation of common themes in the translation literature as well as insights and experiences shared by a number of translators and colleagues who have managed translation projects. As with other parts of this Toolkit, the guidelines and other recommendations in this chapter are based in part on the guidelines and recommendations in the first edition of this guide (HCFA, 1999, Chapter 10: Translating print materials).

## **Suggested resources**

For networking with colleagues when you need help or advice related to translation issues, the Internet interest groups sponsored by the National Institute for Literacy (NIFL) can be a good resource. Try searching the archives or posting a message to the Health and Literacy mailing list:

National Institute for Literacy (<http://www.nifl.gov/>). *The Health and Literacy Discussion List (NIFL-HEALTH)*: You can subscribe to the list at <http://www.nifl.gov/mailman/listinfo/Healthliteracy>. This discussion list is a service of the National Institute for Literacy, in partnership with World Education. It is an online forum for interested professionals who can discuss literacy issues in health care, including health education and literacy programs and issues.

### *Diversity Rx, an electronic clearinghouse of information about language and culture in health care*

1997 Washington, DC: National Conference of State Legislatures, Resources for Cross Cultural Health Care, and the Henry J. Kaiser Family Foundation. May 1997 and ongoing. *Diversity Rx* website: <http://www.diversityrx.org/> (accessed September 9, 2006).

### Office of Minority Health, U.S. Department of Health and Human Services

2001 *National standards for culturally and linguistically appropriate services in health care: final report*. Washington, DC. Available on website <http://www.omhrc.gov/assets/pdf/checked/finalreport.pdf> (accessed September 12, 2006).

### *The provider's guide to quality & culture*

This website is “designed to assist healthcare organizations throughout the US in providing high-quality, culturally competent services to multi-ethnic populations.” <http://erc.msh.org/qualityandculture> (accessed September 8, 2006).

### Salimbene, Suzanne

2001 *CLAS A-Z: A practical guide for implementing the National Standards for Culturally and Linguistically Appropriate Services (CLAS) in Health Care*. This is a step-by-step guide to assist health care organizations to create a health care environment that would meet the needs and expectations of diverse patient and consumer populations. Office of Minority Health, U.S. Department of Health and Human Services, Washington, DC. This guide can be downloaded from [http://www.omhrc.gov/assets/pdf/checked/CLAS\\_a2z.pdf](http://www.omhrc.gov/assets/pdf/checked/CLAS_a2z.pdf).

### Schraver, Karen A.

1997 *Dynamics in document design: Creating texts for readers*. New York: John Wiley and Sons. This book discusses some of the cross-cultural challenges of design, and strongly advocates testing materials with the intended audience.

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