



TOOLKIT for Making Written Material Clear
and Effective

SECTION 2: Detailed guidelines for writing
and design

PART 4

Understanding and using the “Toolkit
Guidelines for Writing”

Chapter 3

Guidelines for writing style

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



TOOLKIT Part 4, Chapter 3

Guidelines for writing style

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This document is the third of four chapters in Part 4 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).



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 in Toolkit Part 4 and 46 guidelines for graphic design in Toolkit Part 5.

For background on the Toolkit, see Toolkit Part 1, *About the Toolkit and how it can help you*, and Toolkit Part 2, *Using a reader-centered approach to develop and test written material*. 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”*.

About this part of the Toolkit

Part 4 of the Toolkit focuses on the guidelines for writing. There are four chapters in Part 4, each of which covers the guidelines for a different aspect of writing. These guidelines apply to writing various types of material intended for use in printed formats by culturally diverse audiences that include people with low literacy skills (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?*)

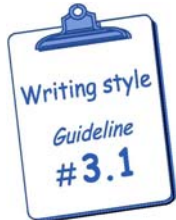
What is this chapter about?

This is the third of four chapters on writing in Toolkit Part 4. It discusses how to apply the guidelines for writing style. These guidelines are listed in Figure 4-3-a below.

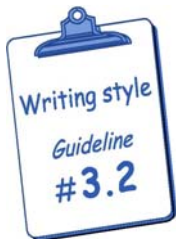
[Other chapters in Part 4 cover guidelines for content of your written material (Chapter 1); guidelines for organizing the content (Chapter 2); and guidelines for engaging, motivating, and supporting your readers (Chapter 4).]

Figure

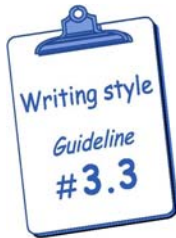
4-3-a. Toolkit guidelines for writing.



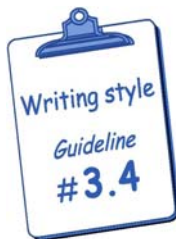
Write in a conversational style, using the active voice. To make your message informal and appealing, use "we" and "you." To make it direct and easy to understand, write in the active voice.



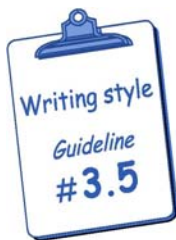
Keep your sentences simple and relatively short. Don't pack too much information into a single sentence. Keep most of your sentences relatively short, and use simple conjunctions (*or*, *but*, *and*). To create good rhythm and natural tone, and avoid sounding choppy, vary the length of your sentences.



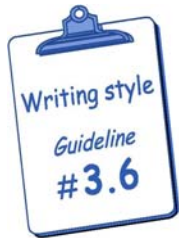
Be direct, specific, and concrete. To help readers understand and use the information, spell out its implications, and be direct in saying what they should do.



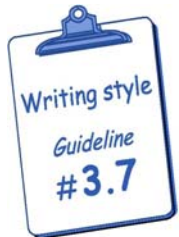
Give the context first, and incorporate definitions and explanations into the text. To help readers understand new information, give the context first. Most readers don't use a glossary, especially poor readers, so explain a new term or concept when you use it. Then continue to include some context to help readers remember what it means.



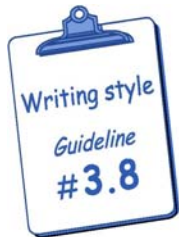
Create cohesion by making strong, logical connections among your sentences and paragraphs. Develop ideas in a logical progression that makes the connections between ideas explicit. Repeat key words and phrases to reinforce learning and create continuity.



Choose words that are familiar and culturally appropriate for the intended readers. Tailor your vocabulary to your readers, using simpler words whenever possible. Be cautious about using professional jargon, slang, figures of speech, and words that may differ by region.



Use technical terms and acronyms only when readers need to know them. Technical terms can be difficult and intimidating; use simpler words whenever you can. It takes extra effort for readers to learn and remember a new acronym, so don't use acronyms just out of habit.

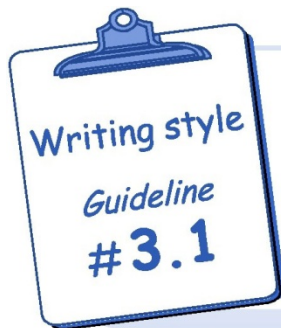


Write as simply as you can, taking into account the reading skills of your intended audience. As a general goal, whatever your audience, write as simply as you can without sacrificing content or distorting meaning. (Be very cautious about using readability formulas or setting goals based on reading grade levels. Readability formulas predict the difficulty of words and sentences, usually based only on their length. Despite their name, readability formulas do not measure ease of reading or comprehension, and the scores from these formulas are not good indicators of overall suitability of material. For concerns and recommendations about using formulas to score written material, See Toolkit Part 7, *Using readability formulas: a cautionary note.*)



Source: Created for this Toolkit. For more about the guidelines and how to use them, see Toolkit Part 3, *Summary List of the “Toolkit Guidelines for Writing and Design”*.

Write in a conversational style, using the active voice



Write in a conversational style, using the active voice.

To make your message informal and appealing, use "we" and "you."
To make it direct and easy to understand, write in the active voice.

What is a conversational style?

A blue, stylized graphic element resembling a stack of papers or a folder. It contains four white rectangular boxes with black borders, each containing a sentence. To the right of each box is a blue dashed arrow pointing left towards the box, followed by a short paragraph of text explaining a feature of conversational style.

We tell more about flu shots in the next section. ←... Conversational style uses "I" or "we" as the "voice" of the material.

Medicare will pay for your flu shot. ←... It uses "you," "your," and "yours" to address the reader directly.

Don't delay in getting your flu shot. ←... It uses conversational forms, such as contractions.

Flu shots are okay for most people. ←... Vocabulary is simple and informal.

The example below shows how a conversational style has simpler vocabulary and a more natural tone than formal writing. To produce this natural tone, try writing as if you were talking to a friend. Then *read it aloud* to hear how it sounds.

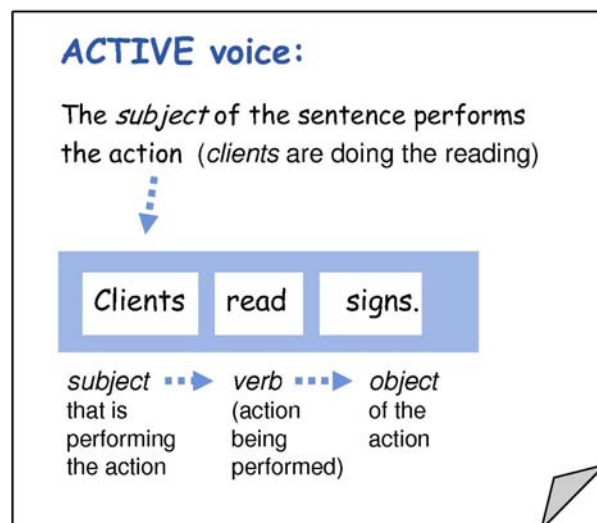


Source: *Simply Put* (CDC, 1999:6).

Addressing your readers directly as “you” lets people know the information applies directly to them. Near the beginning of the written material, you can define your intended audience by telling them explicitly what “you” means. For example: “As a new enrollee in the State Children’s Health Insurance Program, you.....”

Active voice

Active voice is the most common sentence structure in English. It is the one we use the most often in conversation because it is clear and direct. It can take several forms, but the basic one has the subject of the sentence performing the verb: *authors write*; *children play*; *clients read*. It can take an "object:" *authors write books*; *children play games*; *clients read signs*.



Active voice has more punch than passive voice:

- Active voice has a simple, direct, and logical flow from a subject that is performing the action to the object of that action. This direct flow makes active voice sentences easier to understand. For example, in the sentence on the left, you know immediately who is reading the signs.
- Sentences in active voice are slightly shorter than the same sentence in passive voice.

As shown above, the active voice makes material easier to understand because there is a direct and logical progression from *subject* performing the action to *verb* to *object*. Sentences with this direct flow are easy to read, and they encourage people to keep reading. For more about the benefits of a conversational style that uses the active voice, see Guideline 4.1 about writing in a friendly, positive tone (in Toolkit Part 4, Chapter 4, *Guidelines for engaging, motivating, and supporting your readers*).

Passive voice

Passive voice is just the opposite of active voice. What would be the subject in active voice -- the person or entity "doing" the verb -- is relegated to a marginal position, and sometimes omitted entirely. For example: *children play games* is in active voice; *games are played by children* (or *games are played*) is in passive voice.

PASSIVE voice:

The *subject* of the sentence does *not* perform the action (*signs are not* doing the reading)

Signs are read by clients.

Transforming the sentence to passive voice turns the object (*signs*) into the subject.

Passive voice has less punch than active voice:

- Transforming the sentence to passive voice reduces the active emphasis on *clients*. Now you have to wait until the end of the sentence to find out who is reading the signs.
- Sentences in passive voice are less direct and slightly longer. For example, the sentence to the left is two words longer: passive voice adds the word “are” in *are read*, and the word “by” in *by clients*.

To check whether your sentence is in active or passive voice:

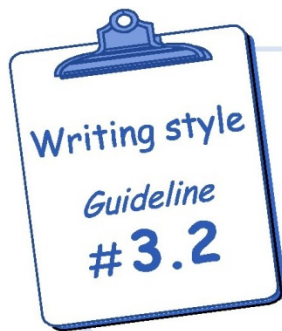
- **Look for who or what is actively doing something.** For example, in the active voice sentence, *children play games*, it’s “children” who are actively doing something. In the passive voice version of this same sentence, *games are played by children*, “games” are not doing something active.
- **Look for the word “by” as a clue that a sentence might be in passive voice.** For example, *games are played by children*. Typically, you will find the performer of the action immediately after the word “by” (in this example, *children* is the performer of the action).

Passive voice is not wrong; it’s just less effective than active voice in most situations. In a few situations, passive voice is more appropriate than active voice. For example, you may want to use passive voice to be tactful (such as, *a mistake was made*), or when the subject of the sentence is not important or is unknown (such as, *applications are processed*).

When you find yourself needing to use the passive voice, use it. But try to rewrite your sentence in the active voice first. You’ll be surprised how easy that conversion is and how much more direct your writing becomes.



Make the sentences simple and relatively short

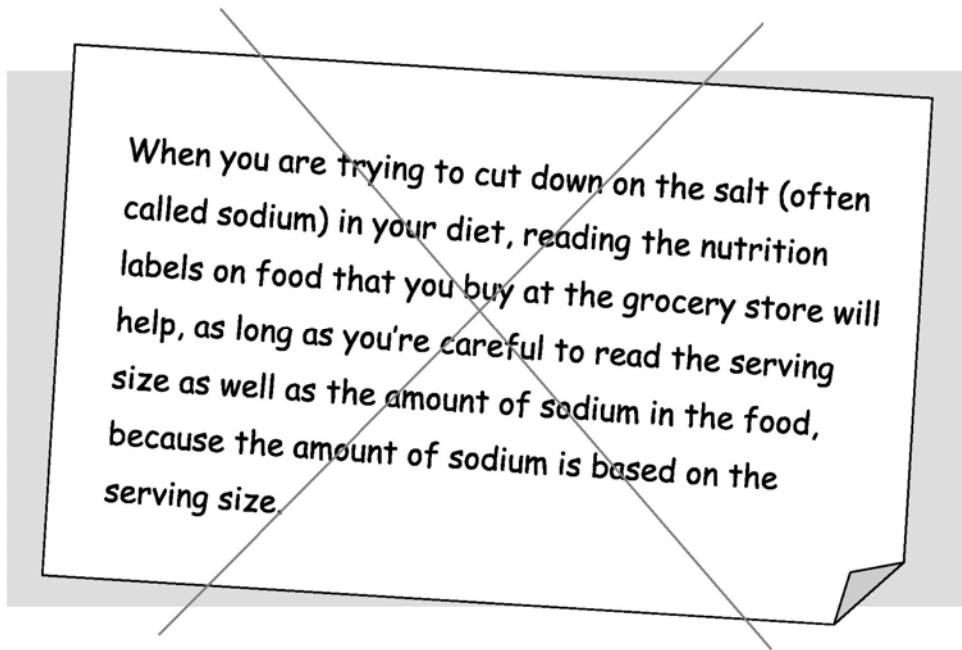


Keep your sentences simple and relatively short.

Don’t pack too much information into a single sentence. Keep most of your sentences relatively short, and use simple conjunctions (*or, but, and*). To create good rhythm and natural tone, and avoid sounding choppy, vary the length of your sentences.

Use simple sentence structure

Packing too much information into a single sentence makes it hard to follow. As shown in the example below, complex sentences are hard to read because clauses with secondary messages interrupt the main message:

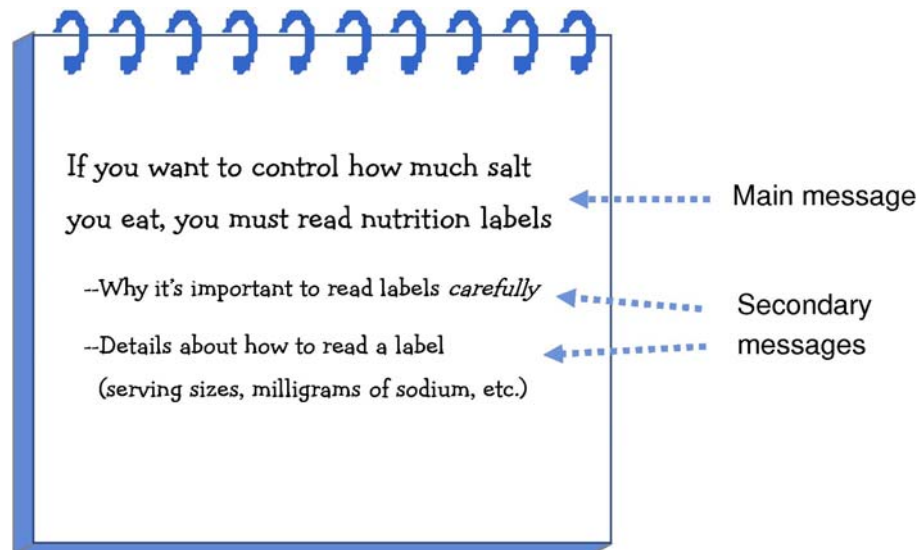


This wordy sentence is complex and extremely long (62 words!). It packs a paragraph or more of information into a single sentence. There are so many secondary messages that it's hard to identify the main message.

When sentences get this long and complex, simple editing won't help. You need to start over. Think about what your readers want and need to know, and then rewrite using shorter, simpler sentences. Here are tips to help you untangle and simplify your text:

1 Start by analyzing the text and developing a strategy

- **Reconsider how much you need to include.** Examine each part of the content and ask yourself, *Is this something readers need to know? How will they use this information?* Then eliminate unnecessary content.
- **Separate the main and secondary messages.** Try outlining the main and secondary messages, focusing on what you want readers to know and do. This will help you remove secondary information that is interrupting your statement of the main message. Here's an example:



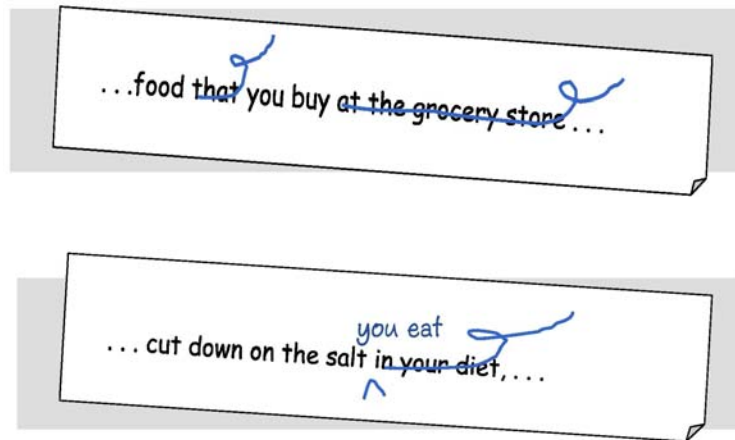
- **Identify which terms and concepts you need to explain upfront.** Examine the text and ask yourself, *What do readers need to know first in order to understand what follows?* For help in developing a good sequence, see Guideline 2.2, “Organize the information in an order that will make sense to the intended readers,” (Toolkit Part 4, Chapter 2) and Guideline 3.4, “Give the context first, and incorporate definitions and explanations into the text” (we discuss it later in this chapter).

2 Rewrite using sentences with simple structure

- Keep most of your sentences relatively short.
- Use simple conjunctions (*or, but, and*).
- Limit the number of explanatory or qualifying clauses in your sentences.
- Consider using lists instead of sentences to make a large amount of information more readable.
- Consider adding examples or illustrations to explain complicated information more clearly.

3 When you finish, edit what you've written

Look again for words you can delete and phrases you can simplify. Here are two examples:



Use a variety of reasonably short sentences

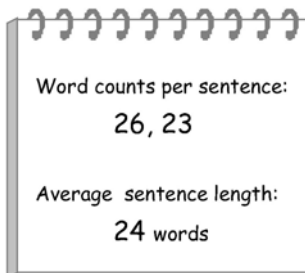
When sentences are long, the main point gets lost in all the words. Keep your sentences simple and direct. Most should be reasonably short. For less-skilled readers, a range of about eight to fifteen words per sentence typically works well. For good rhythm and natural tone, vary the length of your sentences.

The example in Figure 4-3-b below has three sets of sentences, each of which covers the same content using simple language. What differs is the sentence length. As shown in the third set of sentences, adding a somewhat longer, natural-sounding sentence of about 12 to 15 words can break up the choppy effect created by using many short sentences (Center for Substance Abuse Prevention [CSAP], 1994).

Figure

4-3-b. Variations in sentence length.

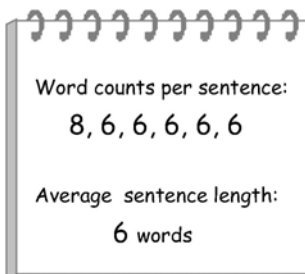
VERSION 1 is hard to follow. There is too much packed into each wordy sentence:



We want you and your family to get the medical care you need, but it's always possible that you might have a problem getting that care.

If you have a problem, we want you to call us at 553-4444 because we are here to help you stay healthy.

VERSION 2 is choppy. There are too many short sentences of similar length:

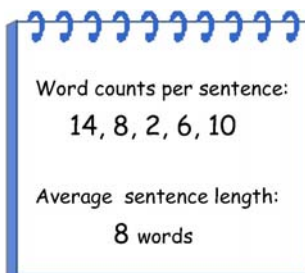


You will usually get the care you need. But you might have some problems.

Call us if you have problems. Our phone number is 553-4444.

We are here to help you. We want you to be healthy.

VERSION 3 is much better. All of the sentences are relatively short, but they are varied enough to be interesting and sound natural:



Most of the time you won't have problems getting the medical care you need.

But if you do, we want to help. Call us. Our phone number is 553-4444.

We're here to help you and your family be healthy.



Source: Created for this Toolkit.

Keep the paragraphs reasonably short

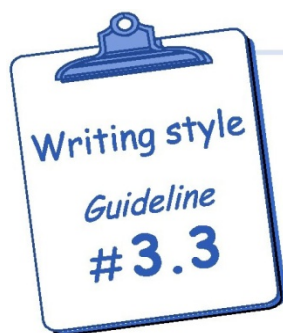
Just like the words and the sentences, paragraphs should be relatively short. Short paragraphs are more inviting to your reader and give the visual appearance of being easier to read. Keep in mind that if you divide your text into columns, your paragraphs will look longer.

For less-skilled readers, a range of about two to four sentences per paragraph often works well. It’s okay to make a single sentence into a paragraph, too.

The first sentence of a paragraph or section is the topic sentence. It should carry a very clear message to help keep readers on track. When you keep your paragraphs short, you will have more topic sentences to guide the reader (CSAP, 1994:4).



Be direct, specific, and concrete



Be direct, specific, and concrete.

To help readers understand and use the information, spell out its implications, and be direct in saying what they should do.

When people read your written material, they want to know, *what does this mean to me, personally?* Give them a clear, direct answer. Making the information in your materials concrete and action oriented has two important benefits:

- **It helps you hold the reader’s attention.** If the information is general and impersonal, rather than concrete and action-oriented, you force your readers to figure out how to apply what they

read to their own situation. This adds a cognitive burden that may discourage them from using the material. Less-skilled readers, in particular, find it hard to apply abstract principles or a general discussion to themselves.

- **It helps ensure that readers notice the main messages and interpret them correctly.** If you make your readers do the work of identifying and interpreting the personal implications of the material, they may miss or misinterpret an important message.

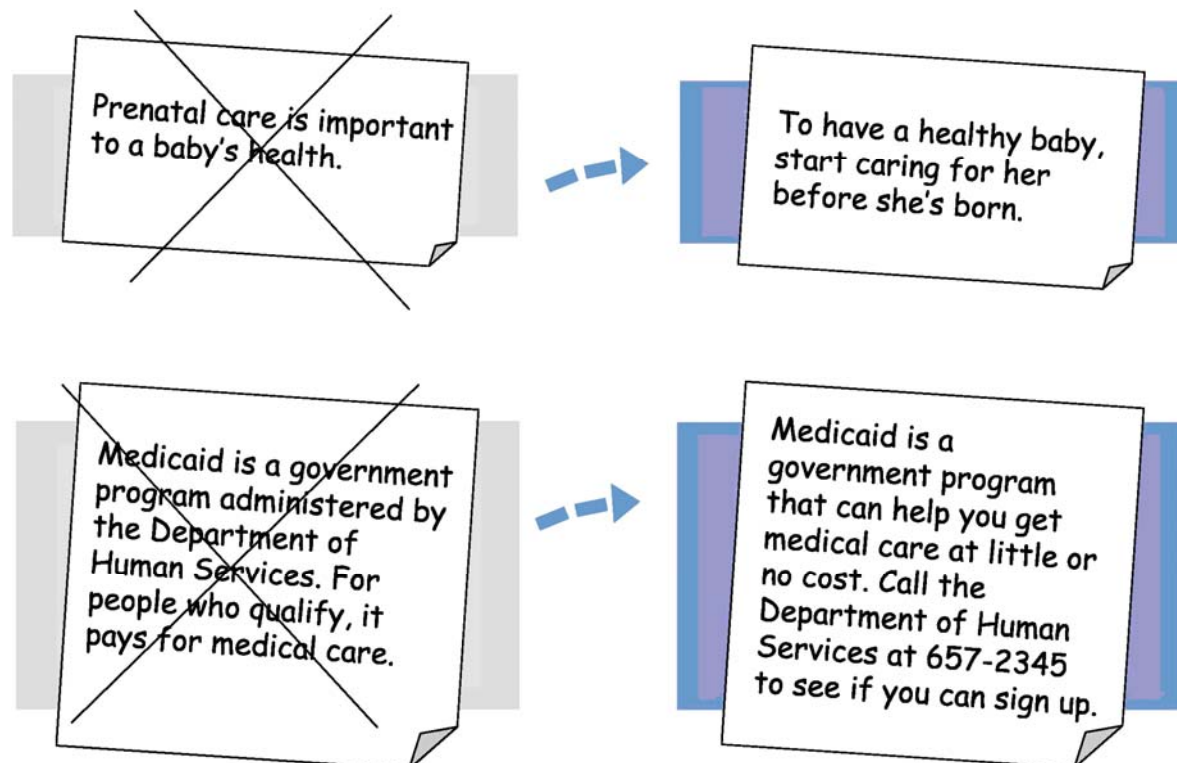
So instead of putting extra burden on your readers, help them out. Make your writing direct, specific, and concrete. Figure 4-3-c has “before” and “after” examples that show how.

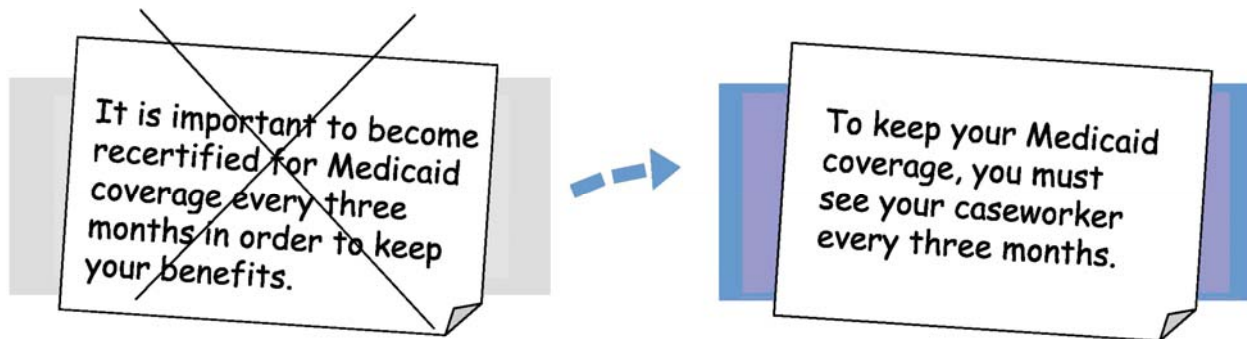
Figure

4-3-c. Making your text direct, specific, and concrete.

The wording of statements on this side is general and impersonal. Readers have to figure out how the information applies to them.

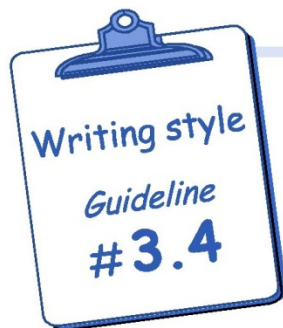
The statements on this side give specific advice in a caring voice. Each one addresses the reader directly, and focuses on what the reader should do.





Source: These examples are from *Write It Easy-to-Read* (Root & Stableford, 1998). Used with permission of Sue Stableford.

Give the context first, and incorporate definitions into the text



Give the context first, and incorporate definitions and explanations into the text.

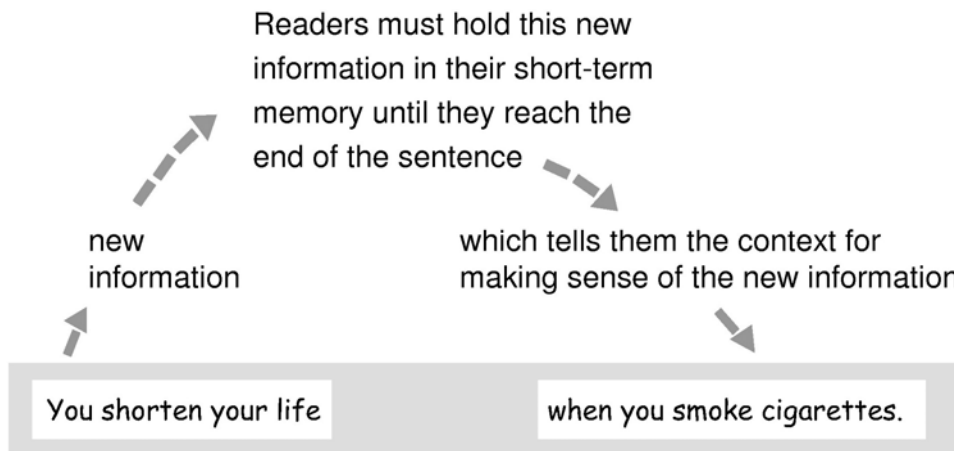
To help readers understand new information, give the context first. Most readers don't use a glossary, especially poor readers, so explain a new term or concept when you use it. Then continue to include some context to help readers remember what it means.

To help readers understand new information, give the context first. Figure 4-3-d shows how giving the context first prepares readers to receive the new information.

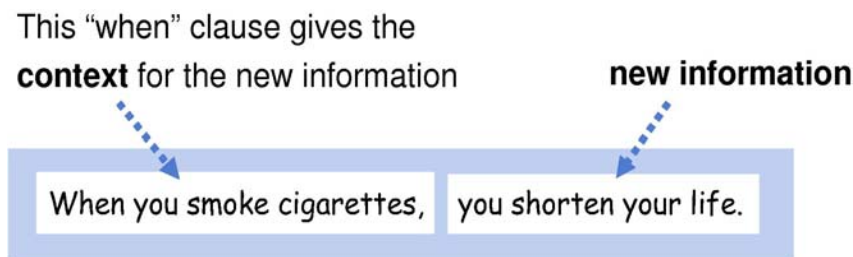
Figure

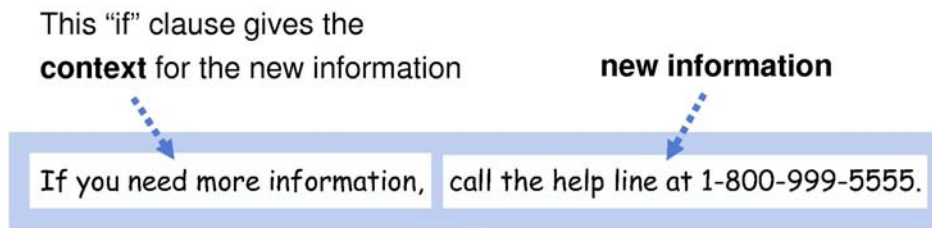
4-3-d. Putting the context at the beginning of a sentence prepares readers to understand the rest of the sentence.

As shown in the example below, presenting new information before you give the context for it puts a burden on your readers:



Instead, help your readers by giving them the context at the beginning of the sentence. **Giving the context first prepares your readers to receive the new information.** Here are two examples:





Source: Based on text in the book *Teaching Patients with Low Literacy Skills*, Second Edition (Doak, Doak, & Root, 1996:83) and put into diagram format for use as an example in this chapter. Adapted and used with permission. For more about preparing readers to receive new information, see *Teaching Patients with Low Literacy Skills*, Second Edition.

Incorporate definitions and explanations into the text

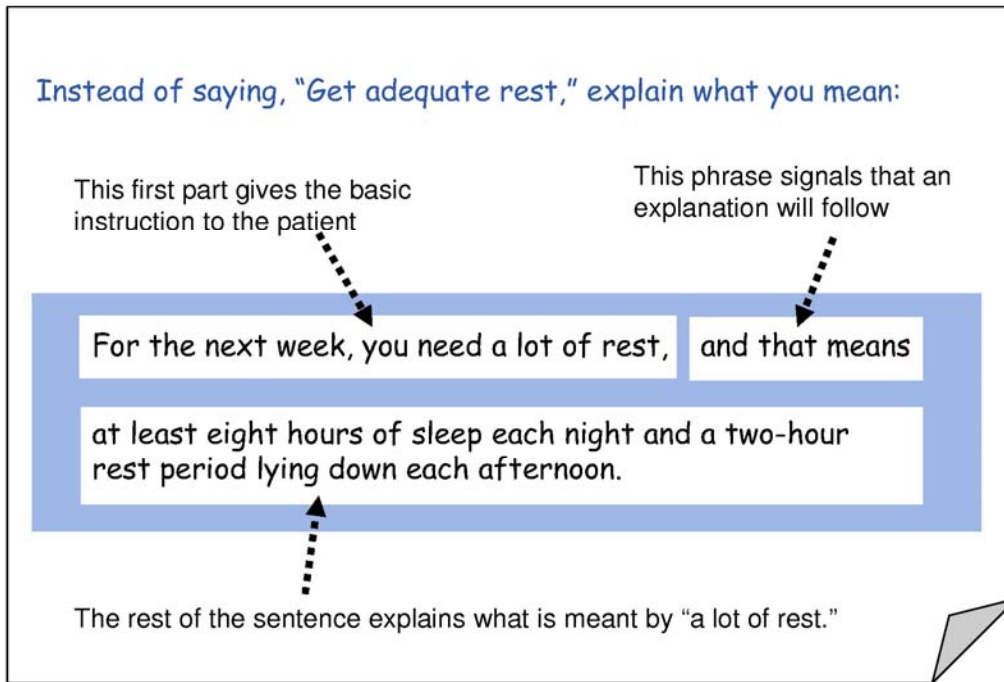
It’s hard for less-skilled readers to look up words and apply definitions to something they’ve just read – and so they seldom do. Watch for words that are likely to be unfamiliar to your readers. Also, watch for words that are abstract or vague, or that may mean different things to different people. To help make sure that readers understand your message, incorporate definitions within the text, right where they are needed. Figure 4-3-e gives an example.

Figure

4-3-e. Incorporating specific explanations into your text.

The book, *Teaching Patients with Low Literacy Skills* (Doak, Doak, & Root, 1996), warns that **abstract, general words tend to cause problems because they often mean different things to different people**. For example, a post-operative patient might be told to call the doctor “if there is excessive bleeding.” But how much bleeding is *excessive*? The nurse and doctor know, but chances are the patient does not. And what is meant by instructions such as “eat a variety of foods,” or “get regular exercise”?

As shown below, to help your readers understand the material, incorporate definitions and explanations into the text.



Here are additional tips:

- Even after you have explained a new idea, continue to include some context to help readers remember what it means. Remember that readers need time and repetition to absorb new material.
- In addition, if the material is long, repeat the explanations to reinforce readers’ understanding. When they read something they feel they have already learned, their confidence grows.
- Finally, make it easy on those who skim by repeating the explanations in each new section.

Source: Adapted with permission from discussion and examples in *Teaching Patients with Low Literacy Skills*, Second Edition (Doak, Doak, & Root, 1996:79–80) and put into diagram format for use as an example in this chapter. For more about incorporating definitions into the text, see *Teaching Patients with Low Literacy Skills*, Second Edition.

Be cautious about using symbols in your explanations

When you introduce a complex concept, take the time to give a careful explanation. If you use symbols or pictures to represent a concept, be sure to explain what they mean in a caption or the text. Also, check on how members of your intended audience are interpreting them. It is surprisingly hard to create clear and effective picture symbols (see Toolkit Part 5, Chapter 6, *Guidelines for photographs, illustrations, and clip art*).

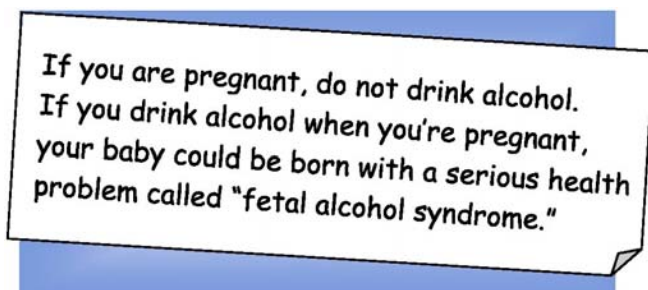
As shown below in Figure 4-3-f, a short cut summary puts too much burden on readers.

Figure

4-3-f. Be cautious about using symbols to explain concepts.



Putting the message in the form of a word equation makes it abstract, impersonal, and hard to understand. It's up to the reader to extract the meaning and figure out the personal implications. In addition, “fetal alcohol syndrome” is very difficult vocabulary that requires explanation.

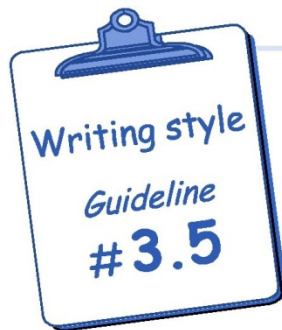


This version builds in the beginning of an explanation of fetal alcohol syndrome (“a serious health problem”). It explains the risk of drinking alcohol while pregnant and tells the reader directly not to do it.

Source: Adapted from *Simply Put* (CDC, 1999:7).



Create cohesion



Create cohesion by making strong, logical connections among your sentences and paragraphs.

Develop ideas in a logical progression that makes the connections between ideas explicit. Repeat key words and phrases to reinforce learning and create continuity.

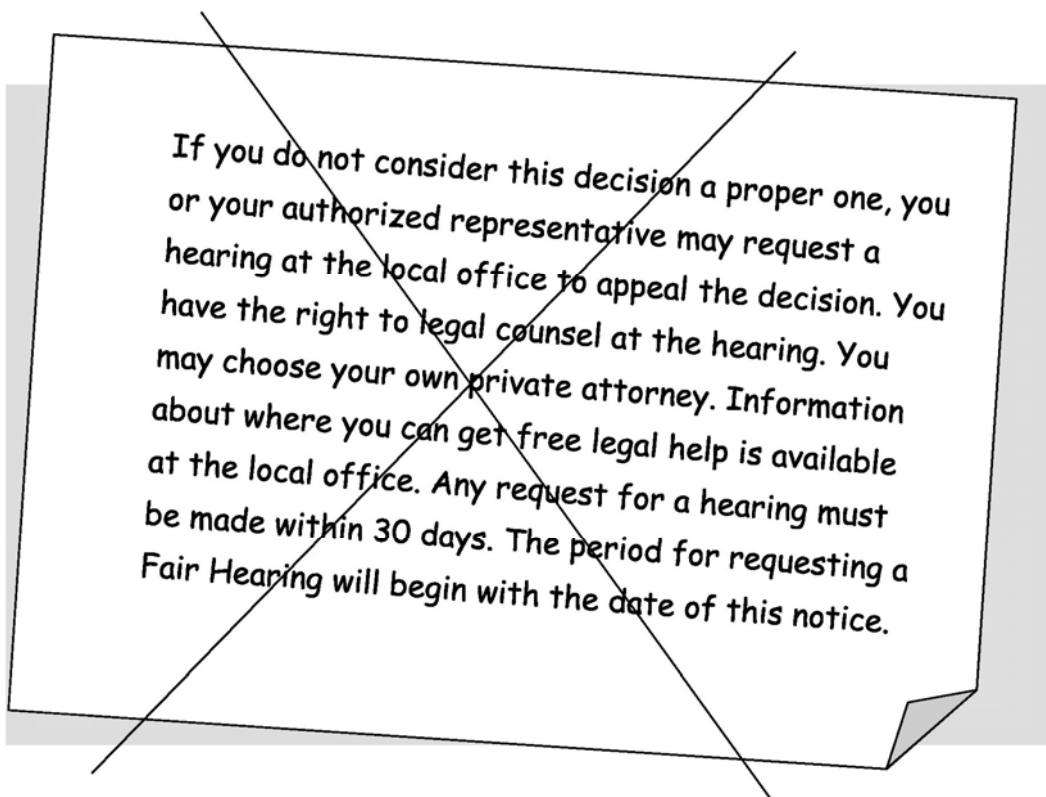
Cohesion occurs when the information in sentences or paragraphs holds together easily in our minds. Cohesive writing creates a smooth flow of information that is easy to understand. It guides readers from one point to the next, helping them anticipate what is coming next and refer back to what has already been mentioned.

Create cohesion by making strong, logical connections among your sentences and paragraphs. This includes developing ideas in a logical progression that makes connections explicit, and repeating key words and phrases to reinforce learning and create continuity. Figure 4-3-g illustrates the importance of creating cohesion.

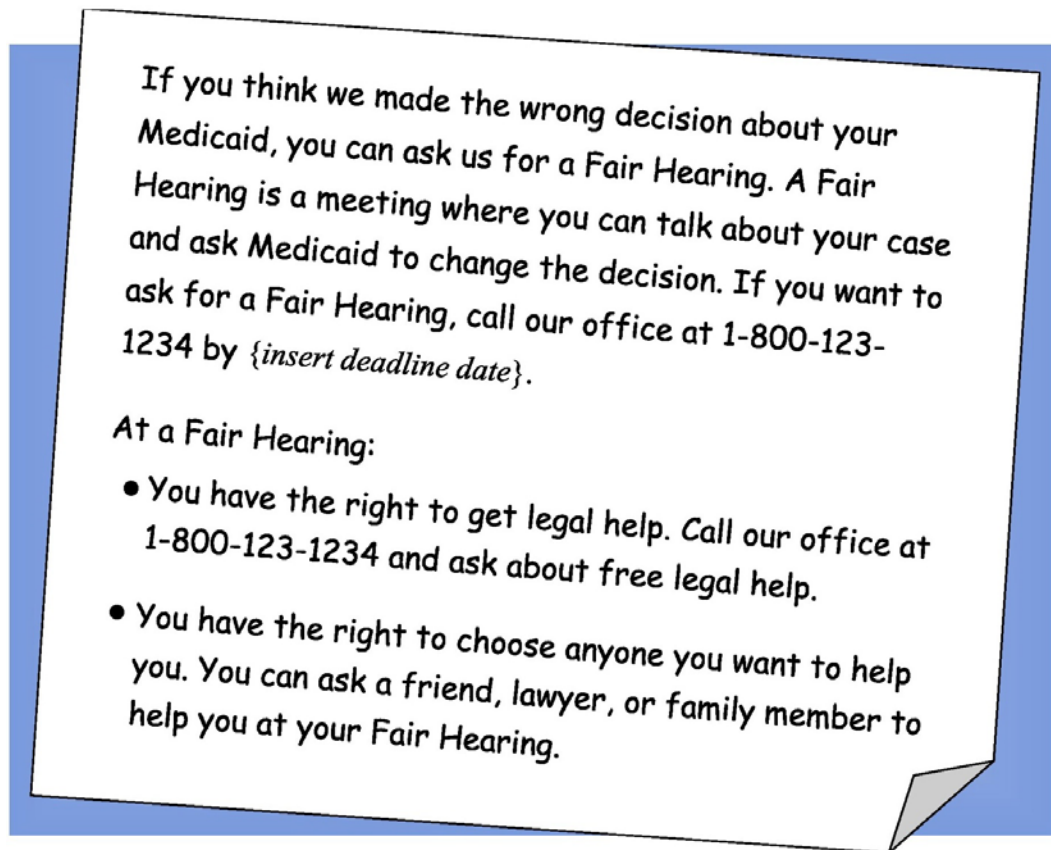
Figure

4-3-g. Create cohesive text.

In the example below, the text lacks cohesion because every sentence contains only new information. When every sentence is about something new, it’s up to the reader to supply all of the connections. The cognitive burden of figuring out how all of the new information is connected can be overwhelming to readers, especially those with low literacy skills.

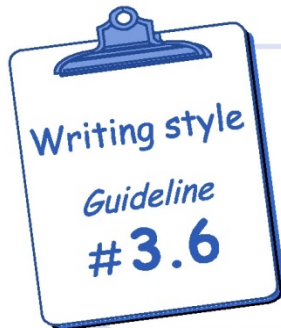


Link your words and concepts from sentence to sentence and paragraph to paragraph so that new information becomes familiar as readers move through the text:



Source: The text about creating cohesion and the introduction and examples in this figure are adapted from work done by Christina Zarcadoolas, Penny Lane, Holly Smith Mirenda, and Mercedes Blanco as part of a project for the Centers for Medicare & Medicaid Services by the MAXIMUS Center for Health Literacy. For information about the MAXIMUS Center for Health Literacy, visit <http://www.maximus.com/services/health/health-literacy>.

Use words that are familiar and culturally appropriate



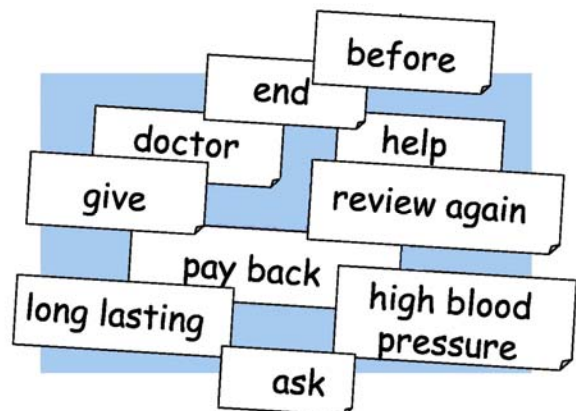
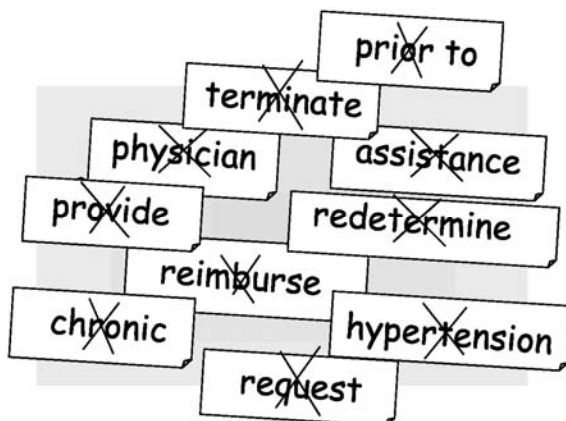
Choose words that are familiar and culturally appropriate for the intended readers.

Tailor your vocabulary to your readers, using simpler words whenever possible. Be cautious about using professional jargon, slang, figures of speech, and words that may differ by region.

Use the shorter, simpler words that your readers know and use

Use words that are familiar to your intended audience. Shorter words tend to be common in conversations and so your readers will find them easier to understand. There are exceptions, of course. For example, *access* has only two syllables, but to many readers, it is unfamiliar health care jargon (or computer jargon). The word *organization* has five syllables, but most readers probably know it.

Here are just a few examples of word substitutions you might make:



It’s easy for agency staff, health care professionals, and others who produce materials to forget which terms are new or difficult for the public. To simplify the vocabulary in your materials, try suspending your taken-for-granted knowledge of specialized vocabulary. Go through your materials and circle all of the words that you think a reader who lacks your subject matter knowledge and experience may not recognize. Ask people who represent your intended readers to review it as well. You will probably find many opportunities for simplification. Later in this chapter, there are guidelines that urge you to use technical terms only when you need to, and to explain them carefully when you do.

Simplify legal language

As *The Health Literacy Style Manual* explains, legal language is “generally written at a high reading level, in a stilted style, and in an authoritarian tone. Much of the vocabulary is not familiar to readers with low literacy skills and not easy for them to read. Sometimes even common words may have different meanings for bureaucrats than they do for the public. For example, to the staff the word ‘family’ may mean parents and children—or the ones in the budget. But to the general public, “family” may mean everyone living in the home, including Uncle Joe and Grandma.” (MAXIMUS, 2005:22).

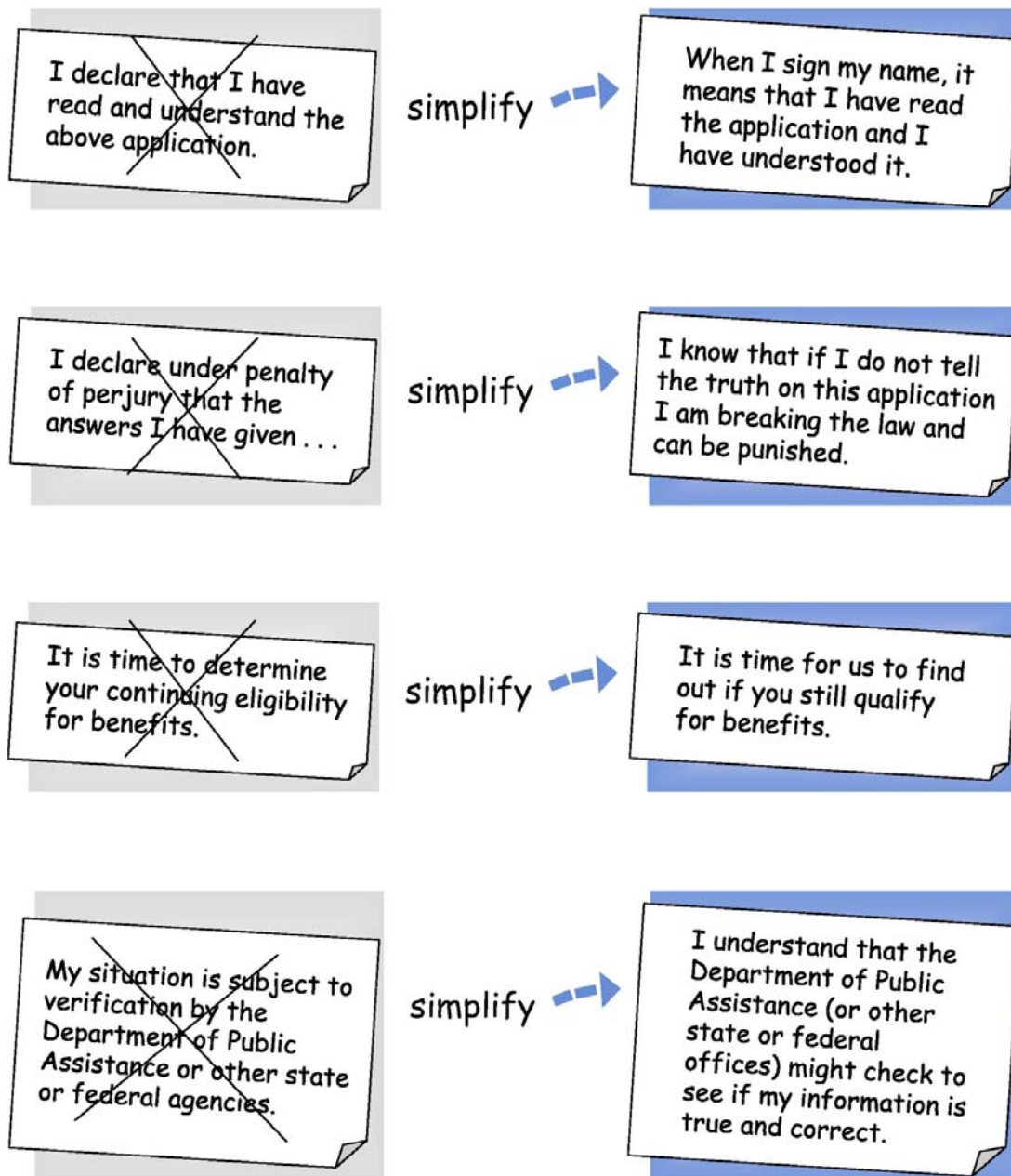
If there is complex legal language in your materials, work with the attorneys in your organization to produce a simpler version that satisfies their legal requirements. It is usually possible to rephrase legal terminology and other formal language, keeping the integrity of the message but using easy-to-read vocabulary. If it is not possible to substitute a simpler version, another option is to write the prescribed legal text and then paraphrase it in plain language immediately afterward (*The Health Literacy Style Manual*, MAXIMUS, 2005:23).


For a helpful resource on simplification of legal language, see *An Introduction to the HIPAA Privacy Rule* (Pritts, 2005). Written by an attorney, Joy Pritts, this document was prepared for the *Covering Kids & Families* National Program Office, Southern Institute on Children and Families. Appendix G has plain language principles and a thesaurus for making HIPAA privacy notices more readable, and it includes examples of notices from several states.

To simplify the legal language in your written material, use the strategies covered in the guidelines of this chapter. These include substituting easier words, defining words and using examples, providing context cues, writing cohesively, and repeating words that you want the reader to learn. Figure 4-3-h below has examples that show how dramatic the improvement can be.

Figure

4-3-h. Examples of ways to simplify legal language.





Source: The first two examples in this figure are adapted from work done by Christina Zarcadoolas, Penny Lane, Holly Smith Mirenda, and Mercedes Blanco as part of a project for the Centers for Medicare & Medicaid Services by the MAXIMUS Center for Health Literacy. The last two examples and the discussion of legal language that precedes this figure are reproduced with permission from *The Health Literacy Style Manual* (MAXIMUS, 2005:22). For information about the MAXIMUS Center for Health Literacy, visit <http://www.maximus.com/services/health/health-literacy>.

Use words that are culturally appropriate and respectful

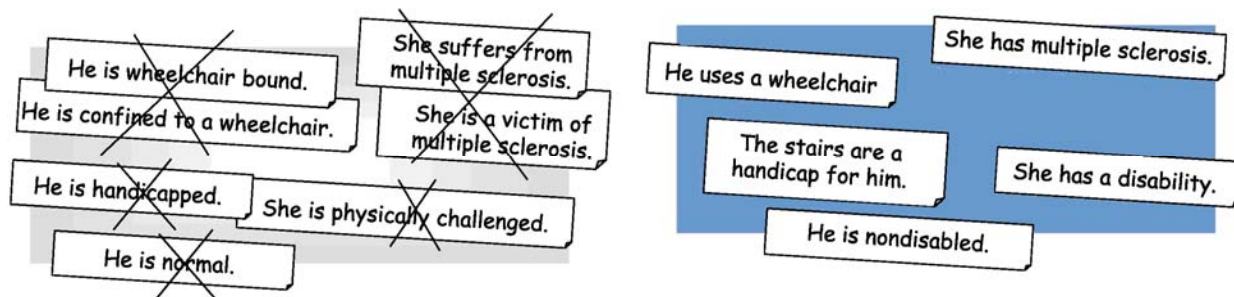
To help readers relate to your material, use words, phrases, and examples that reflect their habits and cultural customs. Here are tips for choosing language that is respectful and culturally appropriate:

- To choose the most effective and culturally appropriate ways to get your messages across, rely on advice and feedback from members of your audience and key informants. They will help you identify and avoid any stereotyped portrayals. It’s especially helpful to ask people who represent your intended readers to review your drafts.
- **Sometimes you may need to use more than one word to reflect the diversity or preferences of your intended readers.** For example, if you know that some of your readers use community clinics rather than private doctor’s offices, say “doctor’s office or clinic” in your materials. Getting feedback from your intended readers is crucial when you are unsure about which words to use. For example, should you say “Black” or “African American” or both? “Hispanic” or “Latino” or perhaps a name that is more specific, such as “Mexican” or “Puerto Rican”? One term or the other may be preferred for certain audiences or certain parts of the country, and even then, some people may disagree. Toolkit Part 11, *Understanding and using the Toolkit Guidelines for Translation*, discusses regional variations in terminology and gives examples.
- Be cautious about using slang expressions or figures of speech because they are likely to be culturally inappropriate for at least some of your readers. Slang expressions may undermine the tone of your material by sounding excessively familiar or even condescending. It is best to avoid them. When figures of speech are unfamiliar, they will frustrate or confuse readers who take them literally. For example, what if someone is unfamiliar with the expression “you’ll feel better down the road,” and tries to interpret it literally?
- **Use resources to learn more about culturally appropriate communication.** For suggested resources, see the end of Toolkit Part 2, *Using a reader-centered approach to writing and design*.

Figure 4-3-i below is adapted from a resource that gives detailed advice about how to write about disabilities in a respectful way.

Figure

4-3-i. Guidelines for writing about people with disabilities.



To help people use words and images that create a straightforward, positive view of people with disabilities, the Research and Training Center on Independent Learning (University of Kansas) produced *Guidelines for Reporting and Writing about People with Disabilities*. Developed in collaboration with over 100 national disability organizations, these guidelines have been reviewed and endorsed by media and disability experts. Portions have been adopted into the Associated Press stylebook.

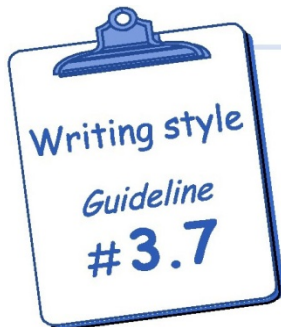
Here are some highlights from the Guidelines:

- **Put people first, not their disability.** Say *woman with arthritis*, *children who are deaf*, *people with disabilities*. This puts the focus on the individual, not the particular functional limitation.
- **Do not use generic labels for disability groups**, such as *the deaf*. Emphasize people, not labels, by saying *people who are deaf*.
- **Emphasize abilities, not limitations.** For example, say *uses a wheelchair* rather than *confined to a wheelchair*, or *wheelchair-bound*. Say *uses braces* or *walks with crutches*, rather than *crippled*. Do not use emotional descriptors such as *unfortunate* or *pitiful*.
- **Do not sensationalize a disability** by saying *afflicted with*, *crippled with*, *suffers from*, *victim of*, and so on. Instead, say *person who has multiple sclerosis* or *man who had polio*.
- **Do not use euphemisms to describe disabilities.** Disability groups strongly object to using euphemisms to describe disabilities. Terms such as *handicapable*, *mentally different*, *physically inconvenienced*, and *physically challenged* are considered condescending.

- **Show people with disabilities as active participants of society.** Portraying persons with disabilities interacting with nondisabled people in social and work environments helps break down barriers and open lines of communication.
- **Do not portray successful people with disabilities as superhuman.** Even though the public may admire super achievers, portraying people with disabilities as superstars raises false expectations that all people with disabilities should achieve this level.
- **Be aware that the word *handicap* is not a synonym for *disability*.** Handicap describes a condition or barrier imposed by society, the environment, or by one’s own self. Some individuals prefer *inaccessible* or *not accessible* to describe social and environmental barriers. Handicap can be used when citing laws and situations but should not be used to describe a disability. Do not refer to people with disabilities as *the handicapped* or *handicapped people*. Say *the building is not accessible for a wheelchair-user* or *the stairs are a handicap for her*.

Source: Adapted from an early edition of *Guidelines for Reporting and Writing about People with Disabilities* developed by the Research and Training Center on Independent Living, University of Kansas, Suite 4089 Dole Center, 1000 Sunnyside Avenue, Lawrence, KS 66045-7555. (785) 864-4095, RTCIL@ku.edu. For the latest edition of the guidelines, visit <http://www.rtcil.org>. Adapted and used with permission.

Use technical terms only when readers need to know them



Use technical terms and acronyms only when readers need to know them.

Technical terms can be difficult and intimidating; use simpler words whenever you can. It takes extra effort for readers to learn and remember a new acronym, so don't use acronyms just out of habit.

Technical terms, acronyms, and other abbreviations can be intimidating, and it takes extra effort for readers to learn them. As you write your materials, be alert for the terminology you take for granted. You may be so used to using it that you forget how hard it can be for others to understand.

Do readers need to learn the term?

When you notice technical terms, acronyms, and abbreviations, consider whether readers truly need to learn them:

- Sometimes it’s important to use a technical term, because people in your audience will encounter the term and need to know what it means. Words like *mammogram*, or *cholesterol* are good examples.
- Sometimes an acronym is more familiar than the words it stands for, such as *HMO*. In this case, using the acronym will be easier for readers.
- If it’s not necessary for readers to learn a term, replace it with everyday words whenever you can without losing the content or distorting the meaning.
- Don’t put an extra and unnecessary burden on your readers by abbreviating words that you use only a few times.

Teach the meaning of technical terms

Explain crucial technical concepts and terms in non-technical ways. Here are suggestions:

- **Explain the meaning using words that are familiar to your readers.** For example, a mammogram can be explained as an x-ray of the breast to check for signs of possible cancer. You can be relatively certain your readers will know the words *x-ray* and *cancer*.
- **When you are explaining something new, drawing a comparison to something more familiar may be helpful.** To develop an effective analogy, think about the interests and experiences of your intended readers. Suppose, for example, that you need to explain blood tests to people with diabetes. Specifically, you want readers to understand the difference between the daily blood testing they do on their own and a special laboratory blood test called the hemoglobin A 1 C that their doctor orders several times a year. It might work to use a weather analogy, comparing the daily blood testing to daily temperature, and the A1C blood test to an average monthly temperature. But you would need to test such an explanation with readers to be sure.
- **Use resources.** Seek inspiration from easy-to-read materials and from resources that provide definitions or substitute language for health care terms. For example, the following resources have word lists: <http://www.plainlanguage.gov/howto/wordsuggestions/simplewords.cfm> and MAXIMUS (2005:20):

- **Use readers’ reactions to guide what you say and check whether your explanations are clear.** To be sure that your analogies are culturally appropriate and effective, listen closely to members of your audience for the words and examples they use to get points across.

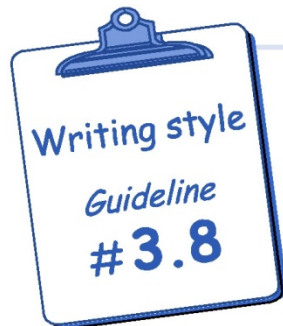
Explain acronyms and abbreviations

In typical practice, you introduce an acronym by putting it in parentheses immediately after the words it stands for. Then, having identified it, you are free to use the acronym in place of the words it stands for. However, if you are writing for less-skilled readers, it will work better to introduce the acronym in the following way:



Notice how this approach places the emphasis on the acronym and uses boldface type to teach the reader the source of the letters in the acronym. If the material is long, make it easy on those who skim by repeating your explanation of the acronym in each new section.

Write as simply as you can



Write as simply you can, taking into account the reading skills of your intended audience.

As a general goal, whatever your audience, write as simply as you can without sacrificing content or distorting meaning.

(Be very cautious about using readability formulas or setting goals based on reading grade levels. Readability formulas predict the difficulty of words and sentences, usually based only on their length. Despite their name, readability formulas do not measure ease of reading or comprehension, and the scores from these formulas are not good indicators of overall suitability of material. For concerns and recommendations about using formulas to score written material, See Toolkit Part 7, *Using readability formulas: a cautionary note.*)

What about using readability formulas?

Low health literacy is a widespread problem with serious consequences (see Toolkit Part 1). Since so many health-related written materials are too difficult for their intended readers, it's crucial to make your material as clear and simple as you can (Institute of Medicine of the National Academies [IOM], 2004; Rudd, Kaphingst, Colton, Gregoire, & Hyde, 2004; Schwartzberg, VanGeest, & Wang, 2005; Root & Stableford, 1999; Office of Disease Prevention and Health Promotion [ODPHP], 2006).

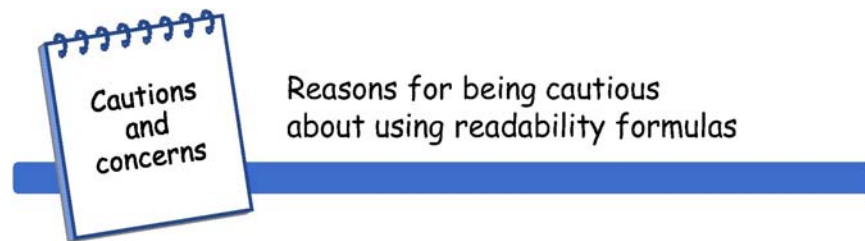
Sometimes people set goals for written material based on a targeted reading grade level, such as “this needs to be at the 6th grade level.” To find out whether they have reached this goal, they use a readability formula to score the text. There are several dozen readability formulas, including the Fry formula, SMOG, and Flesch tests (Flesch-Kincaid and Flesch Reading Ease). Though the formulas vary, they estimate difficulty based on what is easy to count at the level of individual words and sentences, such as the length of words and sentences. Results from these formulas are often given as a grade level, such as “fourth grade” or “12th grade.”

It’s easy to infer from the name, “readability formula,” that the formulas measure comprehension or reading ease, but they do not. Readability formulas measure things that are easy to count, like number of syllables and number of words in a sentence. The formulas do not measure attributes beyond the sentence level, such as how well sentences are connected, let alone the active role of the reader in interpreting the text.

Since many people are unaware of the narrow and mechanical focus of these formulas, the grade level scores from these formulas are often interpreted and used in ways that go well beyond what they measure. If you are developing written material, it’s important to know about the formulas and be cautious in how you use them. The Toolkit covers this topic in Toolkit Part 7, *Using readability formulas: a cautionary note*. Figure 4-3-j below summarizes the concerns and recommendations that are discussed in detail in Toolkit Part 7.

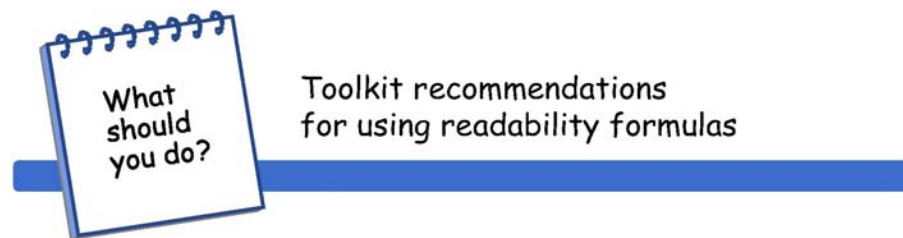
Figure

4-3-j. Using readability formulas: A summary of concerns and recommendations.




- **Readability formulas completely ignore most factors that contribute to ease of reading and comprehension, including the active role of the reader.** A grade level score is based on the average length of the words and sentences. This tells you nothing about whether the words are familiar to your readers and nothing about whether the sentences are clear and cohesive. A grade level score can’t tell you whether the material will attract and hold people’s attention or whether they will be able to understand and use it. This means that relying on a grade level score can mislead you into thinking that your materials are clear and effective when they are not. (For more about what readability formulas do and do not measure, see *Figure 7-c, Readability formulas ignore the active role of the reader* and *Figure 7-d, Readability formulas alone can’t tell you whether written material is clear and effective*. Both are in Toolkit Part 7.)
- **Grade level scores for the same text can differ considerably depending on the formula you choose and how you use it.** In addition, there are problems of unreliable measurement if you score text by computer.

- **Grade level scores are less precise than they sound and it is tempting to over-interpret what they mean.** For more on this topic, see Toolkit Part 7, Figure 7-e, *What does a readability score actually mean?*
- **The need to meet a grade level standard based on a readability formula can lead writers to produce text that is actually *less* readable.** Edits that are done to make text score at a lower grade level can produce choppy text that lacks cohesion.



- **Use readability formulas only as tools for occasional limited use -- not as ways to measure overall suitability of documents.**
 - Use scores from readability formulas as a check on difficulty of words and sentences – not as indicators of comprehension, not as summary assessments of reading ease or usability, and not as a guide to writing. If material is too difficult for the intended readers, a readability score might help you convince others that revisions are essential.
 - In general, make writing clearly and cohesively in “plain language” your general goal for any written material for any audience.
 - Rely on feedback from your intended readers as the ultimate test of whether materials are clear and effective (see Toolkit Part 6, *How to collect and use feedback from readers*).
- **Pick your readability formula and method carefully.** This Toolkit recommends scoring written material by hand using the Fry method or the SMOG (instructions are provided in Toolkit Part 7). Scoring by hand tends to be more reliable than computer scoring. Also, working directly with the text makes you more aware of your writing habits and helps you spot ways to improve. If you use a computerized readability formula, prepare the text first to avoid misleading results. This includes removing embedded punctuation and text that is not in full sentences.
- **Interpret a score from a readability formula as indicating a general range of difficulty rather than a specific grade level.** For suggestions, see Toolkit Part 7, Figure 7-h, *Interpreting scores from readability formulas as ranges of difficulty*.

- **Report scores from readability formulas in ways that acknowledge the narrow scope and limitations of readability formulas.** When reporting a readability score, tell which formula and method you used, what it measures, and include other information to help people make a meaningful interpretation of the score. Tell whether the material has been tested with the intended readers. Consider listing the words that were counted as “difficult” by the formula (those with 3+ syllables) to help others judge whether they are likely to be familiar to the intended readers. For an example, see Figure 7-i in Toolkit Part 7.

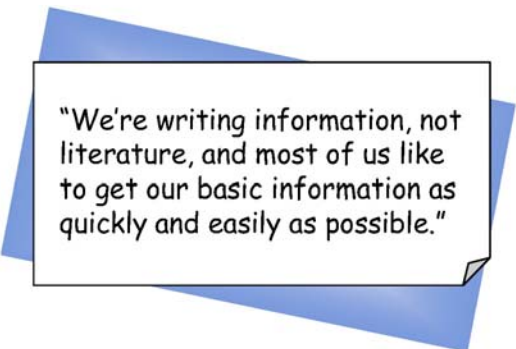


Source: Adapted from *Toolkit for Making Written Material Clear and Effective*, Part 7: *Using readability formulas: A cautionary note.*

Make writing in “plain language” a general goal

Figure 4-3-j above urges you to make writing clearly and cohesively in “plain language” your general goal for *any* written material for *any* audience. The *Toolkit Guidelines for Writing and Design* will help you get the reading grade level of your materials as low as you can without losing important content or distorting the meaning, and without sounding condescending to the reader. Testing the material with readers will verify whether the material is clear and effective.

Plain language is essential for readers with low literacy skills, but it works well for others, too.



“We’re writing information, not literature, and most of us like to get our basic information as quickly and easily as possible.”

As Jane Root and Sue Stableford have said, the bottom line is that we’re writing information, not literature, and most of us like to get our basic information as quickly and easily as possible. We skim the text looking for answers to our questions, and if we can’t find them easily or feel overwhelmed by the amount of information, we may just give up (Root & Stableford, 1998).



End notes

Acknowledgments

Thanks to Julie Carson, Mark Evers, and Penny Lane for their contributions to this chapter and assistance with examples. Thanks also to Sue Stableford, Len Doak, Ceci Doak, and Christina Zarcadoolas, for their insights into what it takes to make writing clear and effective, and for supplying some of our examples and letting us adapt them for use in this chapter.

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PlainLanguage.gov

This is a resource from the federal government which contains guidelines and examples on how the federal government can improve its communications with the public.

Also on this website, references on health literacy:

http://www.plainlanguage.gov/populartopics/health_literacy/ (accessed September 8, 2006).

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