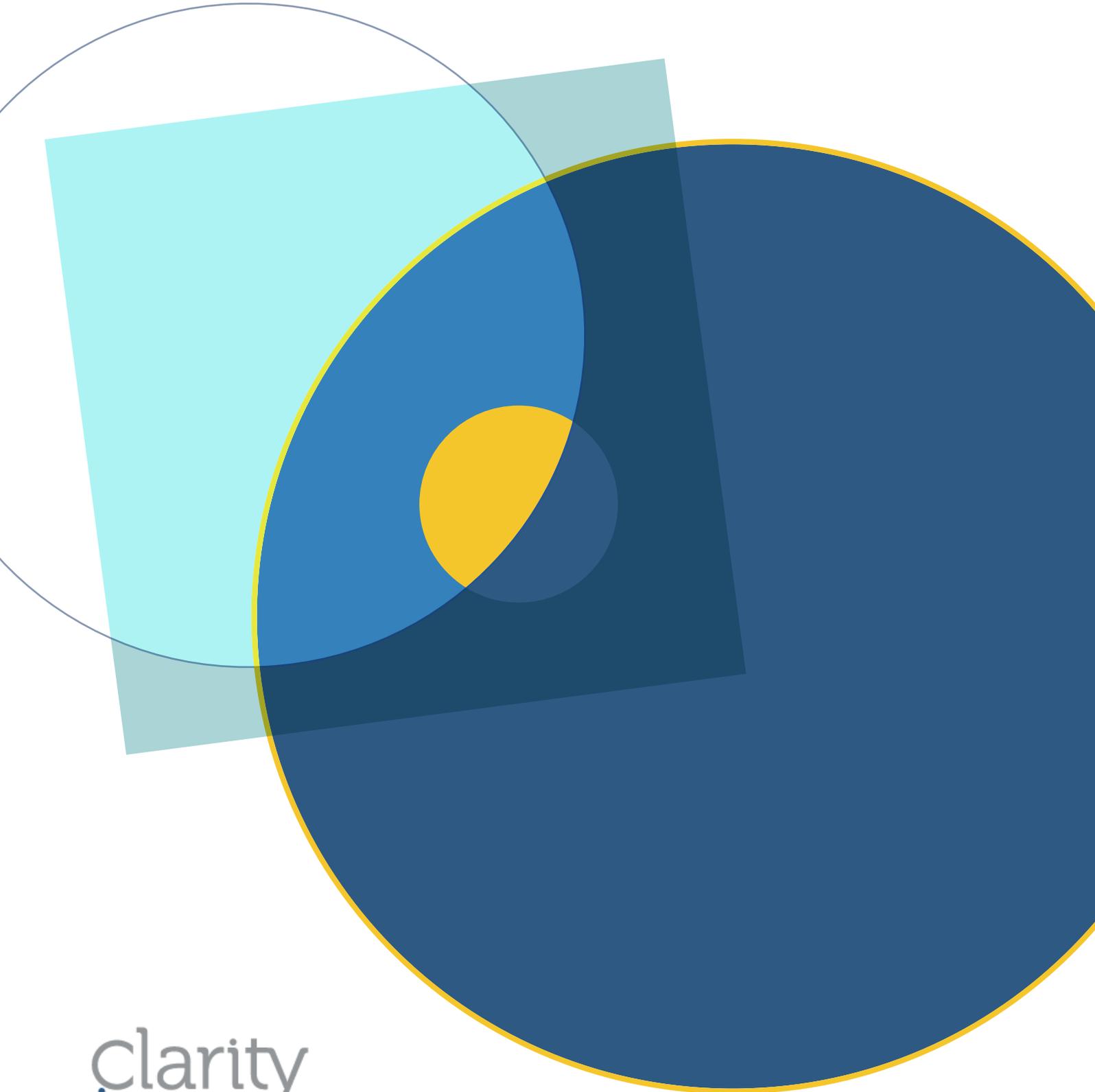


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From the President



This edition of The Clarity Journal helps the plain-language world take the next steps in its response to a very important issue — namely, towards developing an international standard for plain-language documents. I congratulate the Standards Committee of the International Plain Language Federation for the hard work they have put into developing this proposal. Its chair, Christopher Balmford, is someone whom I greatly admire and respect. He served with distinction as

Clarity’s president. Most importantly, he is passionate about plain language and has been a key player in that world for many years now.

I can see the argument in favour of establishing standards. Without them, we risk damage to our industry through a lack of any objective measure of the quality of our product.

The Standards Committee has set itself an important first step by aiming to have a standard established in one country (Australia) before moving onto the international scene. The Committee intends to apply to develop the standard through the processes of the International Standards Organization (iso.org). Its reasons for doing so are set out in Christopher’s article on page 6.

Getting a national standard established is not an easy task. The benefit to the public must be demonstrated as well as an underlying wave of support from stakeholder bodies.

I wrote to all Clarity members in July 2018 about this project. Through this edition of our Journal we will learn more about the proposal. But importantly, there is an opportunity at the upcoming Clarity conference in Montreal to hear directly from members of the Standards Committee. They will be speaking at a plenary session on Saturday 27 October 2018 under the title “Plain Language Standards and Policies: Indispensable?”.

That session alone is a good enough reason to come along to Clarity 2018. But there are many others. Please visit the conference website at www.clarity2018.org and look at the magnificent program that the organisers, Educaloi, have put together.

I look forward to meeting as many Clarity members as possible in Montreal on 25-27 October 2018.

As always, I am keen to hear from you with your ideas and suggestions.

Eamonn Moran QC

President

Clarity International

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In this issue



Annetta Cheek, Ph D
Chair, International Plain
Language Federation



Joanne Locke
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Toward International Standards for Plain Language

In November 2010, the International Plain Language Working Group published a series of options papers in Clarity Issue 64, collectively titled *Strengthening plain language: public benefit and professional practice*. These papers identified a series of questions the plain language community needed to address. The first two were how to define plain language in an international context, and what standards should be set for plain language. A few years later the Group adopted a definition very similar to that in the original options paper. At PLAIN's 2017 conference in Graz, Austria, the Group changed its name to the International Plain Language Federation (the Federation) and formed a committee to take on the next question identified in 2010 – what standards to set for plain language.

We agreed that we wanted to introduce the concept to the plain language community in *The Clarity Journal* and at the Clarity conference in Montreal in October, 2018. Only with the support and advice of the community will our effort be successful. This issue achieves that first goal.

The papers:

Australia Christopher Balmford is the chair of the Federation's Standards Committee. He has agreed to be the point person working with Standards Australia to get ISO approval of the standard we develop. In his paper, he gives a brief history of developments so far, explores the reasons we decided to go to ISO, and lays out what comes next.

Australia, USA, New Zealand Christopher Balmford, Annetta Cheek, Susan Kleimann, Lynda Harris, and Karen Schriver present a model of how we might structure a plain language standard. The article includes some questions the plain language community might want to comment on as we move forward with this standards project.

Portugal Miguel Martinho, a native Portuguese speaker, presents his ideas about what concepts we need to consider in developing plain language standards that can be applied across all languages. He does this by sharing high-level tips ready to be adopted to each language's specific syntax and vocabulary.

Norway Sissel Motzfeldt, native Norwegian speaker, suggests standards for both common texts we write most often and the more demanding documents, such as laws, regulations, and guides. He organizes his ideas according to 6 major steps in the writing process.

Australia Coming from the viewpoint of someone who works in the legal field, specifically developing information for the public that helps them understand the law, Joh Kirby focuses on the increasing role that on-line communication plays in our lives today, and how that might affect how we should approach the development of international standards.

Netherlands Karel van der Waarde, a design expert, touches on the importance of considering design as an integral part of developing a plain language document. He discusses the various audiences that might exist for a standard, and the process that needs to be followed to develop a plain language communication.

Chile Claudia Poblete Olmedo points out some plain language criteria that can be shared by several languages, and uses a hierarchical criterion of greater or lesser agreement between Spanish and other languages to discuss those criteria.

South Africa Sarah Slabbert and Nadja Green suggest some plain language standards that can be used for Afrikaans as a contribution to developing international plain language standards that would apply across languages.

The Center for Plain Language has agreed to collect comments on the proposed standards. Please send your comments and ideas to Standards@centerforplainlanguage.org.

And please join us Saturday afternoon, October 26, at the Clarity Conference in Montreal for a discussion of the standards.

NOTES

- 1 <http://www.clarity-international.net/wp-content/uploads/2015/05/Clarity-no-64-bookmarked1.pdf>

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An ISO Standard for Plain Language: *the back story and the next steps*



Christopher Balmford

Managing Director
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(Australia)

Christopher is a sea-kayaker, a former lawyer, a past-president of Clarity, a plain-language advocate and practitioner, and chair of the International Plain Language Federation's Standard's Committee. He founded (and sold) Cleardocs.com and founded, and is the Managing Director of, Words and Beyond.

By Christopher Balmford

The Standards Committee of the International Plain Language Federation is working to develop an international standard for plain language through the International Organisation of Standardization.¹

This article outlines the likely process, what's been done (only a little), and what remains to be done (a fair bit).

1 The back story

THE FEDERATION'S 2010 OPTIONS PAPER STARTS A DISCUSSION

In 2010, the International Plain Language Working Group (formed by Clarity, Plain Language Association International (PLAIN)² and the US-based Center for Plain Language³) published an options paper *Strengthening plain language: public benefit and professional practice*.⁴

The paper explores the most prominent questions relating to:

- defining plain language
- setting international standards
- training practitioners
- grounding plain language in research
- advocating for plain language
- certifying practitioners
- strengthening our institutional structure.

THE DEFINITION OF “PLAIN LANGUAGE”

Since then, the Group firmly settled on a definition of plain language, namely:

A communication is in plain language if its wording, structure, and design are so clear that the intended audience can easily find what they need, understand what they find, and use that information.

STANDARDS THAT ARE “OUTCOMES-BASED” OR “ELEMENTS-BASED” (OR BOTH)?

The 2010 Options Paper discussed 2 approaches to a standard:

- an “elements-based standard” — that is, a standard that says “A document is in plain language if it [reflects the guidelines about clear writing];

versus

- an “outcomes-based standard” — that is, a standard that says “A document is in plain language if [testing on a sample audience shows that it is clear].⁵

2. What's happening now?

THE FEDERATION STIRS

At PLAIN's 2017 conference in Graz, Austria, the Group changed its name to the International Plain Language Federation (the Federation) and, more importantly:

- committed to taking the key next steps outlined in its 2010 Options Paper;
- appointed Annetta Cheek, of the Center for Plain Language, as chair of the Federation; and
- formed a committee to drive the standards project.

THE IPLF'S STANDARDS COMMITTEE

The members of the IPLF's Standards Committee are Rosa Margarita Galán Vélez (Mexico), Anne-Marie Hasselrot (Sweden), Susan Kleimann and Karen Schriver (US), Lynda Harris, (NZ), Joh Kirby, Christopher Balmford (Chair) and Bede Sunter, (Australia), and Joanna Richardson (a British national based in Argentina).

The Committee decided that if the Federation is to develop standards about plain language, then it should seek to do so through ISO.

WHAT IS THE ISO?

The ISO describes itself as follows:

We're the International Organization for Standardization. We develop and publish International Standards...

ISO is an independent, non-governmental international organization with a membership of 161 national standards bodies...

ISO creates documents that provide requirements, specifications, guidelines or characteristics that can be used consistently to ensure that materials, products, processes and services are fit for their purpose.

We've published 22,205 International Standards,...⁶

WHY GO WITH THE ISO?

The key reason for seeking to arrange a standard through the ISO is this. If someone proposes to an organisation – say, a bank, a government department, or an engineering company – that the organisation's documents should comply with the international plain-language standard, then the organisation is likely to take that person – say, its employee, or its plain-language consultant – more seriously if the relevant standard is produced by the ISO. The organisation is likely to be familiar with the ISO and some of the standards it publishes.

Also, we are plain language specialists. We claim that writing in plain language is a professional skill that needs standards. In the 2010 Options Paper, we – our profession – talked about the benefits of one day having practitioner certification⁷ in our field. Given all of that, who are we to claim that we've got a "standard" for our profession that we developed:

- in a way that we think is tops;

rather than

- through the international organisation that manages, develops and publishes standards; the organisation that has expertise in the standards field; that sets the standards for standards.

Best if we stick to our knitting and involve the standards experts in developing our standard.

3. What's happening next?

A STANDARD FOR THE WHOLE WORLD? ALL AT ONCE?

Arranging an international standard is – understandably – a significant task. The committee has been told by standards experts that – equally understandably – the best way to proceed is to get a standard up in one country and then to seek to have it adopted internationally.

WHERE TO START?

For various reasons (like where the people willing to do much of the work are based), it makes sense for the Federation to start the standards process in Australia. By the way, when it comes to standards, Australia and New Zealand tend to co-operate. So, an Australian Standard is likely to apply in New Zealand too.

ALLOWING FOR ISSUES SPECIFIC TO A PARTICULAR LANGUAGE

Whatever sort of standard the plain-language profession produces, it is essential that the standard works in as many languages as possible.

The Federation's Standards Committee is still working out the best way to have a standard that works in more than one language, maybe even all languages. The Committee looks forward to the discussion on this topic at the plenary workshop on standards at Clarity's 2018 Conference in Montreal.

Once the standard is adopted in one country (say Australia), then the process of having the standard adopted in other countries provides an opportunity to make changes to allow for matters that are specific to a language or to a country.

But maybe we can have one standard that works across all languages. We could start in Australia with a document in English that is:

- sufficiently broad to apply to most other languages and countries; and
- sufficiently detailed to cover English in detail and to include language-specific, and country-specific, variations for other languages and countries.

When the standard is produced in another language or another country, the standard would deal first with the situation in that language and country and allow for English in the variations. For example, Mexico's standard for Spanish could say "If you're writing in English, then modify the previous element as follows..."

IT WILL BE THE FEDERATION'S PROPOSAL

The Standards Committee of the IPLF, will be the "proponent" (technical term) that proposes the standard. The Committee will make that proposal to Standards Australia⁸, which is the Australian body that manages standards with the ISO.

4. The proposal to Standards Australia

WHAT'S REQUIRED FOR THE PROPOSAL?

For the Federation's proposal to Standards Australia to be approved, it needs to establish 3 things:

- the benefit the standards would deliver to the Australian public – discussions with our Stakeholder Engagement Manager at Standards Australia indicate we have this covered;
- a clear scope for the likely content of the standards – this item is well within our grasp. We have the relevant expertise among the members of the 3 organisations that formed the Federation. Also, much useful work was done for the 2010 Options Paper and has been developed since; and

- support from stakeholder organisations so that Standards Australia can be sure that any standards implemented will be well-received.

ARRANGING STAKEHOLDER SUPPORT

The Standards Committee's proposal to Standards Australia — and in a year or so, to the ISO and the standards organisation in (we hope) your country — will have an increased chance of success if we have a wide-range of organisations writing in support of the proposal to develop the standard.

Standards Australia is particularly interested in representative organisations, professional bodies, government regulators, unions, consumer groups, and academic and research bodies. Mainly, we need support from Australian-based organizations. But support letters from other countries will also be useful and will help set the stage for the next step, spreading the standard to other countries.

Standards Australia requires stakeholder support for it to approve an application. Also, it will be helpful when Standards Australia establishes a committee to develop and review the draft standards.

HOW YOU CAN HELP

If you are able to arrange for an organisation to write in support of the Federation's application to Standards Australia, that would be most helpful. The organisation might be one you work for, are a member of, or that is your client.

A stakeholder's letter of support can just be a short, one-page letter.

If you are able to arrange stakeholder support, then please send an email with a little information about the potential stakeholders and your connection with them to the standards committee's chair (that's me, at christopher@balmford.com). The sooner you let the committee know of any contacts, the better — after 31 January 2019 is likely to be too late.

STANDARDS FOR A FIELD THAT HAS SOME CREATIVITY AND SUBJECTIVITY

One of the issues the plain-language world faces in developing a standard is that our work has at least some creativity in it — less creativity than is involved in writing a poem or sculpting a sculpture, but more than is involved in changing a car tyre or filling a pothole.

The Stakeholder Engagement Manager at Standards Australia was relaxed about this. He gave an example: Standards about good governance are subjective, but they can still set out things that you need.

Also, he pointed out that a standard about poetry could:

- set requirements for example: a sonnet has to have 14 lines, 10 syllables a line, and to rhyme in one of the many patterns that are accepted as amounting to a rhyme;
- but be silent about the quality of the poem.

In response, as the representative of the standards committee, I:

- said “But what about the fact that we care about the quality of the poem?”, and
- outlined the discussion in the 2010 Options Paper about an “elements-based standard” versus an “outcomes-based standard”.

Again, the Stakeholder Engagement Manager at Standards Australia was relaxed about this. He explained that in the standards world, there is a difference between standards that require “conformity” and standards that don't. And conformity requirements are discouraged but only if they go so far as to say something like “to meet the standard, you need to have your document reviewed, approved, and certified by a relevant expert”.

5. Session at Clarity's 2018 Montreal Conference

We will be discussing these and other issues around plain language standards at Clarity's conference in Montreal 25 to 27 October 2011⁹. Hopefully you can come and join in the discussion.

6. Timing: Australia & New Zealand, your country

The Australian process is expected to take until about late-2020, only 2 years or so from now. As soon as possible after that process finishes – all being well – we aim to begin the process of having the standard adopted in other countries.

Assuming the Australian effort is successful, the next step will be to propose the standard to the ISO's Technical Committee 37 – that Committee's scope is "Standardization of descriptions, resources, technologies and services related to terminology, translation, interpreting and other language-based activities in the multilingual information society."¹⁰

You might like to check to see if your country is a member of the ISO's TC 37 Committee, either as a participating member or an observing member.¹¹ If your country:

- isn't a member, then you could start the process for your country to join it; or
- is a member, then you might like to start making contact with the committee's representatives in your country and warming them up for the prospect of a plain-language standard in your language in your country.

You can find the ISO body in your country at www.iso.org/members.html.

Australia is not a member of the TC 37 committee. So, to expedite the international adoption of the standard, the Standards Committee will – if its proposal to Standards Australia is approved – start the process to have Australia apply to join the ISO TC 37 committee. Apparently, that process is fairly straight-forward, which is something.

NOTES:

1 <https://iso.org/home.html>

2 <http://plainlanguagenetwork.org/>

3 <https://centerforplainlanguage.org/>

4 <http://www.clarity-international.net/wp-content/uploads/2015/05/Clarity-no-64-bookmarked1.pdf>

5 For more on the elements-based or outcomes-based standards see the 2010 Options Paper.

6 <https://www.iso.org/standards.html> and <https://www.iso.org/about-us.html>

7 See the options paper in footnote 4 above.

8 <https://www.standards.org.au/>

9 <https://clarity2018.org/>

10 <https://www.iso.org/committee/48104.html>

11 <https://www.iso.org/committee/48104.html?view=participation>

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Plain Language standards

A way forward

By Christopher Balmford, Annetta Cheek, Susan Kleimann, Lynda Harris, and Karen Schriver

The Plain Language Working Group is born – and gets to work

The journey towards this options paper began at the 2007 PLAIN conference in Amsterdam. Three plain language organizations were considering issues, such as whether we should establish international standards for plain language, and what exactly was plain language, anyway. At that time, all we agreed on was that we needed to explore these questions further. The following year, PLAIN, Clarity, and the Center for Plain Language nominated two members each to form what was then called the International Plain Language Working Group. They were joined by six other members representing other countries and languages. The group was chaired by Neil James, who for the following several years was a driving force behind its work.

In 2010, the Working Group published a series of white papers in Clarity (now The Clarity Journal) on a variety of topics important to the international plain language effort. Christopher Balmford's article in this issue provides more information about those papers and about the draft definition of plain language the group adopted.¹ At its meeting in Vancouver in 2013, the group officially adopted the definition it uses today.

The standards effort begins

The group met at the Plain Language Association International conference in Graz, Austria, in 2017. We decided that, having adopted a definition of plain language, we should attempt the next logical step—developing an international standard for plain language. We recognized that this was a huge challenge, given the diversity of languages and viewpoints we would have to accommodate.

The Federation formed a working committee, chaired by former Clarity president Christopher Balmford. The committee decided to seek recognition from the International Organization on Standards (ISO) for any standard we developed. This had the added advantage of pointing the way, in a general manner, to how we need to structure and write the standard, because we will have to follow ISO protocols. The committee further decided to use WCAG 2.1, the web accessibility standards,² as a model. For information about ISO and about these decisions, see Christopher's article in this issue.

As we worked on the first draft, the committee held extensive discussions by email and Skype, and shared multiple drafts with each other. We were also influenced by the other papers in this issue, which were all submitted in response to our request for papers addressing the concept of international plain language standards. We went back to the Clarity 2010 article on standards, where the major discussion was around whether standards should be outcome-based or elements-based. We found that our thinking had evolved in the intervening years to a more integrated approach. Ultimately, we decided to attempt a standard that links high level principles to the definition of plain language cited above, and then develop deeper levels consisting of

- guidance
- techniques, and
- measures of success, woven in as appropriate.



Christopher Balmford

Managing Director
Words and Beyond
(Australia)

Christopher is a sea-kayaker, a former lawyer, a past-president of Clarity, a plain-language advocate and practitioner, and chair of the International Plain Language Federation's Standard's Committee. He founded (and sold) Cleardocs.com and founded, and is the Managing Director of, Words and Beyond.

First draft of a standard, and how you can help

What follows is the committee's attempt to structure and begin drafting an international standard for plain language, one that we intend to be applicable across languages. The ISO process for adopting a standard in a country provides for making changes to allow for matters that are specific to a language or to a country. We also expect that all languages may well begin to develop best practices to reflect what works within their own language, such as sentence length. Using the international standard as an umbrella, we expect that the plain language community will help us move this preliminary version of Standards 1.0 to iterations of Standards 2.0, Standards 3.0, Standards 4.0, and so on that further reflect guidance and techniques that can work across all languages.

We are seeking advice from the plain language community. We will not be able to develop an international standard without your input. Here are some of the questions we have; doubtless there are many more. Please send us your comments, advice, and questions, and join us in Montreal, Saturday afternoon, October 27, for a plenary session about the standards. You can submit comments by sending them to Standards@centerforplainlanguage.org.

Here are some questions we have that you might consider:

1. Should the standards be written for the writer? Should they be able to be used by others as well, such as those suggested by Karel van der Waarde in his article in this issue?
2. Should the standards be linked to the definition of plain language, as we have done in the following draft? Should we include extra categories that include the definition and more?
3. Must we have success criteria for all the techniques? How should we define success?
4. Should the standards accommodate "thinking" or "planning" elements, such as assessing the rhetorical context, interviewing audience to determine appropriate content or context of use?
5. Should we address issues around the quality of the content, and how do we set up guidelines for that along with success criteria?
6. Should the standards address the ethical use or intent of the document?
7. Should the standards capture the iterative nature of a document development process?
8. Should we set a standard for the life cycle of a document or the way a document is part of and integrates into a system of documents?
9. Should we address a document's web accessibility, and if so how? Or should we rely on WGAC for that?
10. Should we set standards for assessing the quality of the content through usability testing or other means?
11. Should we develop standards that allow writers to track their progress over time, over multiple texts (for example, using practices such as benchmarking)?
12. How should we provide empirical support for our guidelines? Although not all of the guidelines have sufficient research evidence yet, all of them do constitute best practices. Some evidence is already published to support these best practices.³ How should we incorporate that research and update it as more work from different countries in different languages becomes available?



Annetta L Cheek

Chair, International Plain Language Federation (USA)

Dr. Cheek is one of the founders of both the federal plain language group, PLAIN, and of the Center for Plain Language. She served as chair of both groups.

While at the Center, she was instrumental in getting the US Congress to pass the Plain Writing Act of 2010.

Dr. Cheek is an anthropologist by training. She worked for the US Federal government from 1980 until early 2007 and spent four years as the chief plain language expert on Vice President Gore's National Partnership for Reinventing Government. She is on the board of Clarity and is the Chair of the International Plain Language Federation.

A draft plain language standard based on the Web Content Accessibility Guidelines (WCAG) 2.1 (<https://www.w3.org/TR/WCAG21/>)

PLAIN LANGUAGE STANDARDS

ABSTRACT

Plain language practitioners have agreed on the following definition of plain language:

*A communication is in plain language if the language, structure, and design are so clear that the intended audience can easily find what they need, understand what they find, and use that information.*⁴

The International Plain Language Federation, following up on its series of 2010 papers,⁵ is proposing to develop an international standard for plain language that can be applied to most, if not all, languages. We intend to apply to ISO for recognition of the standard. Furthermore, we are modelling our standard after that for web accessibility, WCAG 2.1, which has been approved by ISO.⁶

STATUS OF THIS DOCUMENT

This document is an early draft for demonstration purposes only.

TABLE OF CONTENTS

[To be developed]

INTRODUCTION

Layers of guidance

Principles At the top are four principles that provide the foundation for plain language:

- The content is what the reader needs or wants.
- The reader can easily find the content he needs or wants.
- The reader can understand the content.
- The reader can use the content.

Guidelines Under the principles are guidelines. The guidelines provide the basic goals that authors should work toward to ensure their products are in plain language.

Techniques, examples, and underlying thinking Under the guidelines, we set out techniques that writers can follow to make sure their writing or design meets the guidelines. Sometimes, we support the techniques with examples and short pieces of instructional material.

Success criteria [For some guidelines we could have success criteria but perhaps not for all. We will work on this issue once we are able to work with experts at Standards Australia.]

Mandatory or advisory — Standards need to say for each element of the standard whether that element is mandatory or not — the technical terms are “mandatory,” “normative,” and “informative.” We will keep this thought in mind but make that call on each guideline at a later stage and with input from the experts at Standards Australia.

PLAIN LANGUAGE 1.0

Principle 1 *The content is what the reader needs or wants*

Guideline 1.1 **Content clearly states the purpose of the document in terms of reader end goals.** (Focus is on how content helps/assists/informs/ allows reader to do something instead of what the writer (or the organization) wants to tell the reader)

Guideline 1.2 Content reflects the primary reader demographic and task profile. (Focus is on how content is aimed at a particular reader)



Susan Kleimann

President
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Dr. Kleimann is the immediate past Chair of the Center for Plain Language and a member of the International Plain Language Federation's Standards Committee. She founded Kleimann Communication Group in 1997 and has been involved in developing and testing many high impact documents, especially in the financial area. Her work focuses on disclosures intended to convey public policy to consumers, such as the Model Financial Privacy Notice, now used by U.S. financial institutions, and the Loan Estimate and Closing Disclosure, now used for all home purchases in the US. Dr. Kleimann also serves as an expert witness on the clarity of public communications.



Lynda Harris

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Lynda is founder of Write Limited, New Zealand’s leading plain English communications company. Write’s main focus is helping government, commercial, and professional organizations get more value from their daily investment in business communication.

Lynda established the WriteMark, New Zealand’s document quality mark, and is the author of Rewrite – how to overcome daily sabotage of your brand and profit. She is the founder of New Zealand’s annual Plain English Awards and has been a guest judge for the US ClearMark Awards.

In 2015 Lynda was awarded the Mowat Plain Language Achievement Award – an international award recognizing an outstanding contribution to advancing the cause of plain language.

Lynda is the New Zealand representative for Clarity International and a member of the International Plain Language Federation’s working group on developing plain language standards.

- Technique 1.2.1.** Construct scenarios of use for key readers to identify key tasks and purpose of those tasks
- Technique 1.2.2.** Construct personas for key readers to identify variations in audience demographics and circumstances
- Technique 1.2.3.** Construct context of use profiles for key readers to identify physical and emotional circumstances for use of the content
- Technique 1.2.4.** Conduct review of literature to identify characteristics of readers and information needs
- Technique 1.2.5.** Conduct qualitative research (interviews, surveys) to identify baseline information needs of audience
- Guideline 1.3** [Etc]

Principle 2 *The reader can easily find the content they need or want*

- Guideline 2.1** Organization of the document reflects the reader’s needs
[Grouping; related ideas are together or cross-referenced]
[Sequencing: The most important information to the reader comes first]
- Guideline 2.2** Organization of the document is logical and consistent
[Logic]
[Consistency]
- Guideline 2.3** Headings are informative, clear, logical, and consistent

Underlying thinking Consider these 3 types of headings:

- topic headings (for example, Listing jurisdiction) are usually serviceable – as long as they are meaningful to the reader;
- question headings (for example, Listing in Australia or Singapore?) have energy, objectivity/disinterest, they invite the reader into the document; and
- descriptive headings (for example, Why you should list the company in Singapore) help your reader, they contain information that gives the reader a handle on the material in the body text. Before the reader starts reading the body text, they have a clear idea of what it covers.

Technique 2.3.1 Informative

Headings need to do more than name the content that appears beneath them – rather, they need to convey some of the substance of that content.

Example

Topic	Question	Descriptive
Listing jurisdiction	Listing in Australia or Singapore?	Why you should list the company in Singapore

It’s more important for a heading to be clear, logical, consistent, and informative than for a heading to be short.

Technique 2.3.2 Clear

[To be developed]

Technique 2.3.3 Logical

[To be developed]

Technique 2.3.4 Consistent

[To be developed]

Technique 2.3.5 [Etc]

Guideline 2.4

Headings clearly signal all changes in topic and accurately describe the nature of the material they head

Technique 2.4.1 Headings signal all changes in topic

Create a new heading (at one level or another) every time you start writing about a new idea or topic. That might mean you have a heading every paragraph or two.

Underlying thinking If you're thinking something like "a heading every few paragraphs or so sounds like way too many headings to me," then ask yourself "Is it the writer in you that's worried about using too many headings or is it the reader?"

If it's the writer, then maybe you are writing for yourself — or to the mirror — rather than for your reader.

(Have you as a reader — reading a document you had nothing to do with writing etc. — ever thought, "This document has too many headings?")

Technique 2.4.2 Headings accurately describe the material they head

Never allow information to appear under a heading that doesn't accurately cover the information previewed in the heading. It's this discipline that often leads to a document having a heading every paragraph or so (see Technique 2.4.1).

Technique 2.4.3 [Etc]

Guideline 2.5

Design techniques and graphics contribute to the reader's ability to find desired material

Technique 2.5.1 Does the format and design support the reader's need to see, process, and use the content they need?

Technique 2.5.2 Does the design use techniques such as proximity, prominence, sequence, and similarity to underscore meaning?

Technique 2.5.3 [Etc]

Guideline 2.6

[Etc]

Principle 3 *The reader can understand the content*

Guideline 3.1 [Etc]

Principle 4 *The reader can use the content*

Guideline 4.1 [Etc]



Karen Schriver

KSA Communication Design & Research (USA)

Dr. Schriver is President of KSA Communication Design & Research, a consultancy focused on making complex information clear, compelling, and usable. She applies research on information design, plain language, and cognitive science to design everyday communications. Her book, *Dynamics in Document Design: Creating Texts for Readers*—in its 9th printing—has been cited as an essential work in writing and visual design. Recipient of 13 national and international awards for her research, Schriver has made a significant impact on how information designers and plain language advocates think about their work. She is currently writing a new book on evidence-based information design and plain language.

NOTES:

1 <http://www.clarity-international.net/wp-content/uploads/2015/05/Clarity-no-64-bookmarked1.pdf>

2 <https://www.w3.org/TR/WCAG21/>

3 Kimble, J. (2012). Writing for dollars, writing to please: The case for plain language in business, government, and law. Durham, NC: Carolina Academic Press. Schriver, K. A. (2017, Dec.). Plain language in the United States gains momentum: 1940–2015. IEEE Transactions on Professional Communication, 60(4), 343–383.

4 International Plain Language Federation

5 <http://plainlanguagenetwork.org/plain-language/what-is-plain-language/>

<http://www.clarity-international.net/wp-content/uploads/2015/05/Clarity-no-64-bookmarked1.pdf>

6 <https://www.w3.org/TR/WCAG21/>

7 Standardisation Guide 003: Standards and Other Publications, page 8. See <https://www.standards.org.au/standardisation-guides>.

APPENDIX A GLOSSARY

This section is normative

document a written communication in any form

informative for information purposes and not required for conformance

normative required for conformance

Note 1 One may conform in a variety of well-defined ways to this document.

Note 2 Content identified as “informative” or “non-normative” is never required for conformance.

reader the audience for a document or other communication. Reader includes user.

writer People or organizations who create texts, graphics, webpages, PowerPoints, and so on.



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Press Here Plain. Science.

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Plain training & media services for scientific organizations

International standard for clarity

We bet this works for all languages

By Miguel Martinho

We thought human

What makes a text easy to understand? Our shared humanity, with its essential human perspective, was the touchstone for guessing what procedures are likely to work in every language. The result is a bunch of high-level tips, necessarily generic but ready to be adapted to each language's specific syntax and vocabulary. So, for each tip, you may want to think: how would this apply to my mother language?

We brought it down to 4 main tips

It's a sequence, actually.

1. Choose meaningful information

- 1.1 Know your purpose
- 1.2 Know your reader
- 1.3 Choose information to meet your purpose

2. Help your reader pick their own way

- 2.1 Start from the most important
- 2.2 Make skimming easy
- 2.3 Keep it clean

3. Make reading easy

- 3.1 Write short sentences
- 3.2 Use words your reader knows well
- 3.3 Be specific and concrete
- 3.4 State plainly who does what
- 3.5 Repeat it

4. Test your text

1. Choose meaningful information

People don't read official or professional documents for fun. They have to read them so they can take some action. These documents are tools and must be effective. But too much information or too little may be confusing, arise doubts and mistakes.

So, the right kind of information enables your reader to do what they need to. This should take into account your purpose in writing the document as well as who the reader is.



Miguel Martinho
Chief Strategy Officer
Claro, Portugal
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Miguel studied Law and was an advisor to the Portuguese Ombudsman. That showed him how hard it was for ordinary people to understand and use information that was necessary to uphold their rights — Miguel saw the gap between the complexity of public communication and people's literacy. When he watched Sandra Fisher-Martins's TED talk about the right to understand, he decided he would join her quest.

Since 2012, Miguel has helped bring plain language to Portuguese government agencies, banks, insurers, telecoms, and utilities companies, benefiting millions of people. He also speaks publicly, both in Portugal and abroad, about the benefits of plain language to organisations.

1.1 Know your purpose Why are you writing a document? You need your reader to do (or not do) something. What exactly? Take a note to yourself. It will guide all your writing decisions, beginning with the choice of information.

Be specific. A purpose as vague as “I want the customer to be happy with our service” is true but of little use, because everything you do professionally has that generic purpose.

Be selfish. A purpose as selfless as “I want the customer to know the deadline to send me a copy of their identity card” does not point out that you really want: “I want the reader to send me a copy of their identity card by July 12.”

It may help you phrase your purpose if you tell yourself: “I will only be happy if...” The action that completes this sentence is your specific purpose: the criterion of success you set for your document.

1.2. Know your reader Different readers have different needs for information. How old is your reader? Where do they live? What do they do for a living? What do they know about the subject? What’s at stake for them? What are their reading skills?

The better you know your reader, the easier it will be to choose the information they need to understand your text effortlessly and take the action you need.

What would your reader ask? Imagine a quiet chat with your reader on the subject of your document. What would their questions be? Have you included all the answers to those questions?

Are there warnings you should make? Your reader knows possibly less than you on the subject. Are there important things (so obvious to you!) that maybe they have no clue about?

That’s the information that will mean something to your reader.

1.3. Choose information to meet your purpose Since you need your reader to do something, “meaningful information” is the kind that will achieve at least one of the following:

- persuade your reader to do what you need them to
- enable them to do it, with as little effort as possible.

If a piece of content fills any of these conditions, then you should include it. Otherwise, just skip it.

But be sure to include all logical steps: don’t force your reader to infer. What seems obvious to you might be critical to helping your reader understand. And consider including examples from daily life.

2. Help your reader pick their own way

Only your reader will know what information they really need and when they need it. Why not enable them to decide about their own reading? This empowerment is the best way to help them meet your purpose consciously.

2.1. Start from the most important Your reader is busy and wants to find quickly what they have to do to go on with their lives. Make information ready to understand by grouping contents logically and by presenting first the most important (to your reader).

Once you said what really matters to your reader, it’s all right to take your time explaining things carefully: now you might even want to go from general assertions to your reader’s particular case.

2.2. Make skimming easy Your document’s main ideas should stand out, so your reader finds them instantly. It will be of great help that you write, in a few words (say 8 to 12, in Portuguese):

- a key sentence to convey the main message of the document
- meaningful headings to convey the main message of each smaller section.

If possible, these headings should also be full, short sentences. That will allow your reader to skim through the text easily and get a good knowledge of its content. After that, your reader will feel sure about what details they still need to read (if any).

If your document is long, you can also include an abstract or a table of contents.

2.3. Keep it clean Not only should your document be pleasant to look at, its design should help your reader find quickly what's most important – and decide what to read next (if anything). These are good options:

- Allow lots of white space.
- Apply simple, coherent formatting.
- Highlight your key sentence and headings (bold or color will do).
- Write short paragraphs (up to 100 words)

3. Make reading easy

Even complex information can be stated simply. And even good readers will appreciate not having to struggle to understand you.

3.1. Write short sentences Once you stated one idea, it's time to end your sentence. Full stop. That's the best way to give your reader's brain time to fully understand each of your ideas, before moving to the next. It's also a good way to prevent ill-constructed sentences.

Keep your sentences shorter than 40 words and your average below 20.

3.2. Use words your reader knows well Common words are easier to understand. And the way people speak is an excellent source of inspiration to find the common, precise words your reader will understand easily.

So, when tradition weighs on you with its stately vocabulary, just imagine you're talking with your reader. The right words will come to you.

3.3. Be specific and concrete Your reader's brain – as much as your own, actually – prefers reality to abstraction. The more you chose words that represent specific, concrete, even material things, the more they will make sense to your reader.

For instance, it will normally be better to write:

- “your dog” than “the animal”
- “until August 20” than “within 10 working days”
- “the accident with your Ford van” than “the event”.

3.4. State plainly who does what Your document is all about action. Your reader needs to do something. Maybe they've already done something, or maybe your organization has. And surely you will have to take some action if your reader doesn't do what you need them to.

So, it's important to write sentences that leave no doubt as to who does, did, or should do what. Two easy ways of achieving this are:

- using verbs instead of nouns to speak of actions: unlike nouns, verbs force you to build full sentences, with an explicit grammatical subject, who is normally the agent (as a bonus, you also get to know the time of the action, as well as its factual, hypothetical, or counterfactual character),
- building active sentences instead of passive ones: unlike passive sentences, active ones force the grammatical subject to be the agent and, by doing so, prevent you from leaving the agent out of the sentence.

3.5. Repeat it Using the same words to refer to the same things makes understanding easier (even if the Nobel Prize in Literature may thus stay out of reach). As long as you don't overdo it - be aware not to, be aware not to, be aware not to, be aware not to – repetition will work better for clarity than using pronouns, synonyms, hyperonyms, or any other strategy school taught you to avoid repetition.

For instance:

“We sent you a copy of the old contract and a new proposal. Please tell us what you think of the proposal.”

will normally be easier to understand than:

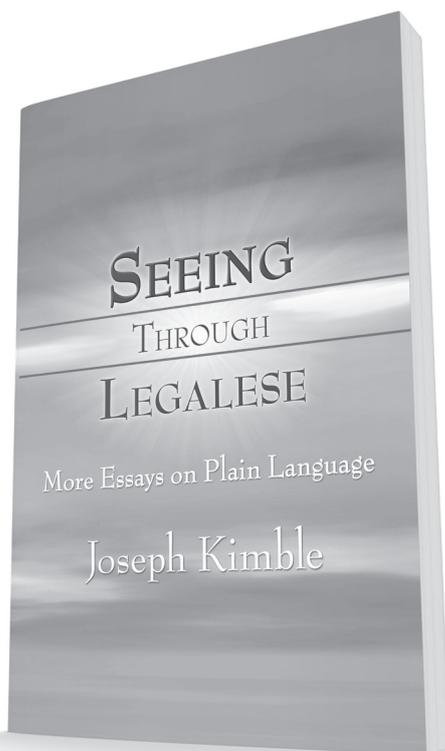
“We sent you a copy of the old contract and a new proposal. Please tell us what you think of the latter.”

4. Test your text

Reality will often speak louder than your expectations, no matter how carefully you've written your document. That's why you should test it, with real readers whenever possible.

If that is not possible, try at least to ask a workmate – preferably from another department – to read it and tell you what they grasped.

Or, if none of this is possible, reread it yourself. But not today – tomorrow morning.



This is Joe Kimble's second book of collected essays. His first collection was called "superb," "invaluable," and "a treasure." This new one has already been described as "packed with insights" and "worth its weight in gold."

Available from online bookstores or from Carolina Academic Press (which also offers an e-book).

Standards that could be applied across languages – suggestions

By Sissel C. Motzfeldt, Agency for Public Management and eGovernment

Oslo, Norway, 28 May 2018

Introduction

We are all authors of texts. In our role as a writer, we intend to communicate a message to a defined audience and that message should be understood the way it was meant. To communicate effectively with our readers, we need good writing skills and a great deal of writing experience, aids of various kinds, and knowledge from many disciplines. International standards for clear language will be a useful tool for ensuring our texts are of high-quality. The standards will be able to help us throughout the entire writing process, from start to finish.

Below, I present some suggestions for international standards, based on experiences from Norwegian Plain Language work. I have chosen to focus on the most common texts we write. Finally, I examine the texts that are particularly demanding to write such as laws, regulations, and guides. These texts typically deal with difficult themes, include multiple authors and disciplines, and they also exhibit higher demands regarding accuracy.

MAIN STEPS IN THE WRITING PROCESS

The writing process occurs in various steps. Each step requires different skills and choices that the writer must assess either alone or together with others. An international standard may be based on these steps and describe what should be the most important standards for each of the steps. Not all writing processes require all these steps, so the steps that do not apply can be skipped. For the most difficult texts, I have tried to formulate some individual standards as an additional step: Step 6.

I envision the following major steps:

Step 1: Define the aim, target audience, and principal message

Step 2: Choose the genre and medium if you can

Step 3: Organise the writing work

Step 4: Write clearly

Step 5: Test the text on its readers

Extra Step 6: The most difficult texts (such as legal regulations and white papers).



Sissel C. Motzfeldt

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Sissel is a senior adviser at the Agency for Public Management and eGovernment, Norway. The goal of the Agency is to strengthen the government's work in renewing the Norwegian public sector. Sissel has since 2012 been a full time manager for the project "Clear language in laws and regulations" and was the first manager for the project "Plain Language in Norway's Civil Service" (2009 – 2011). She has 40 years of experience from the Norwegian Central Government as a communication advisor and communication manager. She had a major role in the development of the Central Government Communication Policy and over the years, she has been managing projects in different areas such as environment, cultural heritage and immigration. She has extensive experience from strategy development and user involvement both in ministries and agencies. Her skills combine lecturing, consulting, project management, and being an eager globetrotter whenever the possibility!

Standards for each step in the writing process

STEP 1 Define the aim, target audience and principal message

Define the purpose of the text and what function the text should have Define whether you intend the text to inform, support, guide, or motivate.

Some texts may have several functions. If you intend to inform, think about what the readers need to gain from the information to, for example, understand a resolution or perform a given action. In a guiding text, you must clearly present in a well-educated manner what the readers should do in a particular situation.

Decide who you are writing for Texts often have multiple readers. If there are multiple target audiences, aim the text at the one who knows the least about the theme.

Take your time to form a picture of the reader or target audience who is to be the main receiver of the text. Consider what the reader knows about the topic before reading your text, the situation they find themselves in, and in what context they will read the text. Also, reflect on the style and tone that will communicate your message to the reader best.

Choose the principal message Why are you writing this text? What's the most important message you're trying to convey?

If there are several messages, then rank them by importance. Think about what is relevant to the reader. We tend to include too much information which is of little interest or importance to the reader.

STEP 2 Choose the genre and medium

Choose the genre and medium if you can Genre refers to the type of communication, such as descriptive information on the web, instruction manuals, or legal documents. The genre controls the design, style, and tone of the text. The same is also true in large part for the choice of medium – is the document on paper, on the web, in a recording, or so on. When you are writing in a genre like internet texts, your message needs to encourage your readers to keep on reading. On the other hand, a long, printed document such as an instruction manual can be longer and needs a rich table of contents and other elements that allow it to be used as a manual.

Use visualisations to aid the text Use pictures, videos, graphics, and other visual tools if the genre and media allow it. Visual tools will often make the text more accessible to the reader.

STEP 3 Organise the writing work

Involve people who are knowledgeable about, and interested in, the work Organise your work together with those involved. Define targets, roles, and responsibilities. It is always a good idea to involve people who are able to be critical of the text and who will provide constructive feedback.

Choose the form of work which matches the function and complexity of the text Create a progress plan for the work with milestones. Set aside time for positive discussions and testing readability. This is especially important when the work involves several people, and the texts cover several disciplines.

STEP 4 Write clearly

Formulate your principal message first Put great emphasis on formulating the principal message so that it becomes clear and distinct. If the message is negative, put extra effort in showing respect and providing a good and thorough explanation of why the decision was made and what it means for the recipient.

Choose a style and tone to match the purpose and receivers of the text Choose a style and tone that matches your message and target audience. Ensure you have a forthcoming tone, even if the message is negative. Don't try to sugar-coat bad news, or you may confuse the reader. If the message is negative, put effort in making the reader feel convinced that the decision is correct.

Find an ordered structure that fits your text and its function Create a main headline that tells the reader what the text is about. Divide long texts into paragraphs, and place the paragraphs in a logical order for the reader.

Create subheadings that match the contents of the paragraphs. Place the most important part of your text first.

Use well-written and consistent bulleted lists Bulleted lists can divide long sentences into manageable sections and make it easier to keep track of content.

Write clear sentences Write as concisely as possible. Avoid redundancies, vague words, and unnecessary clarifications.

Use modern words and expressions Be consistent with word usage.

Explain technical terms and abbreviations It is fine to use technical terms and abbreviations, just remember to explain them in the text first.

Avoid unnecessary or excessive use of foreign words.

Use full stops when you can Long and complicated sentences with many subordinate clauses are difficult to read. Use full stops and give the reader a pause for breath whenever possible.

Follow the rules of writing Follow the rules of writing and use appropriate punctuation.

Proofread Typos, untidy text, and missing text give a sloppy impression. Demonstrate respect for the reader by delivering a proofread text.

STEP 5 Test the text on your readers

Schedule testing of readability early in the work process Decide at which point in the writing process you should test out the text on your readers. This is especially important if you are going to use professional agencies to conduct your testing of readability.

Test the drafts internally and externally as you write While writing, it is a good idea to test the text or parts of it on colleagues or others in your business. This form of testing should not replace testing on real readers.

Listen to the readers and follow their advice Take time summing up the results of your testing and follow the advice as much as possible.

STEP 6: The most difficult texts

These texts exhibit especially high demands regarding accuracy. They are often interdisciplinary, thus involving multiple authors and catering to many different readers, from the more professional to the less so.

To a large extent, the standards from steps 1-5 apply to these texts as well. At the same time, some additional standards for tricky texts may be useful:

Organise your writing work so that it gets completed Create a plan for your work that includes who will participate, their roles, milestones, and work method.

Create a common awareness of clear language and positive anchoring of leadership

Start your work by discussing and agreeing on the principles for clear language use. Having a shared understanding of what clear language entails will make the work easier. Involve management so that your work is firmly anchored.

Use writing workshops as a method In Norway, we have developed a type of “writing workshop” as a method to put interdisciplinary cooperation within a system. Lawyers, professional experts, and language specialists work together with a text for a certain period, and discuss their way to the final text which takes care of both precision and linguistic clarity.

Document important linguistic decisions and choices that you make during your work Create a common workspace where you work with the texts between meetings. By documenting decisions and choices that you make during your work, you avoid future repetitions.

Finish the work with a discussion of what you have learned from the process How did the method or process work? What would you do differently next time?

Consider who may learn from this work Disseminate the knowledge on the method and results internally so you get support for this form of work.

Reflections on the standards

I believe that many of these proposed standards will work well internationally. Through the participation in PLAIN and Clarity, those of us working on clear language in Norway have become very familiar with language profiles from many other countries. It is surprising how similar they are to Norwegian. Across national borders, we clearly have many of the same linguistic challenges and therefore we also need many of the same language solutions.

Finally, my advice in working with international clear language standards:

- There should not be too many standards. Additional texts should be made for each of the standards with references to examples and research, readily available templates, and practical tips.
- The international standards should be made available online so that they are easy to find and use.
- The international standards should be presented in a context that includes a definition of what clear language is, why clear language is important, and what the purpose of the standards is.
- I have deliberately formulated encouraging standards, and have tried to avoid standards that tell you what should be avoided or not done by the author.

Thoughts about a plain language standard in a changing information world

By Joh Kirby, Principal, Kirby Governance

A good place to start to consider a plain language standard is to define plain language. This always causes considerable debate among the plain language community. My preference is the definition used by the Center for Plain Language:

Can the people who are the audience for the material quickly and easily:

- Find what they need
- Understand what they find
- Act on that understanding

I like this definition as it focusses on measuring the success of a publication – is it useful? Does it help a person take the next steps? In my view alternative definitions which focus more on the tools you use to achieve a plain language document such as structure, language, and design are for the standard not the definition.

Having a clear definition sets the scope of the standard itself.

My perspective

I come to the idea of standards as someone who works in the legal field, specifically developing information for the public that helps them understand the law and address their legal issues. The landscape in this area has changed dramatically over the last 15-years. I live in Australia and 15 years ago superior quality legal information was printed - the community wanted hardcopy publications: factsheets, guides, and booklets.

Yes, there were certainly legal information websites at the time, but they were cumbersome and hard to use. They tended to copy the structure of reference books and have hundreds of pages of information. Given that in 2004-05, 69% of the households with access to the internet had a dial-up connection they were impossible to use. Things have changed.

While in 2004-05 only 55% of households had access to the internet in 2016-17¹ more than 80% do, with that increasing to 97% for households with children under 15. My experience is that print publications still have a place, but the scales have shifted firmly to a preference for electronic resources. And the format of online publication is changing dramatically. No longer do you see text books duplicated on-line. The best websites are easy to navigate, provide clear and easy-to-understand information, reduce the number of clicks (steps) required to find relevant information, and link to relevant additional content. They consider accessibility and search engine optimisation to ensure that people find what they are looking for.

So, what does all this have to do with developing a plain language standard? In my view a lot.

In my view it underscores how a plain language standard must consider more than just the printed page. It must reflect the changing way that people are accessing information – electronically.



Joh Kirby

Principal, Kirby Governance
(Australia)

Joh is a lawyer and principal at Kirby Governance, a boutique consulting firm that specialises in working with boards to make them more effective. A significant focus is how clear communication can improve board decision making and effectiveness.

For eight years Joh was the Executive Director of the Victoria Law Foundation, a statutory body in Victoria, Australia, that focusses on educating the community in the law. In this role she advocated for improving the quality of community legal information.

In 2010, Joh received a Churchill Fellowship to research best practice legal information and has written a guide for lawyers in this area.

From 2013 to 2016 Joh was the President of Clarity.

What to include in a standard

There has been extensive discussion on the form of a plain language standard (Clarity Journal vol 64). I am going to focus on what I think the essential elements of a plain language standard should be in a changing information world.

AUDIENCE - HAVE A CLEAR AUDIENCE

No matter what format writing is in it is essential that it be written for a clear audience. I am a puritan in this area and think that you should write for only one audience. This may be because in the legal sector people often want to produce material that is for lawyers, intermediaries and the public – this does not work.

If you want to write effectively for a member of the public you need to focus on them – what do they want to know, what do they want to do, what do they understand? Your writing must work 100% for this audience allowing them to 'Find what they need, understand what they find, act on that understanding'.

It is a happy coincidence if the writing is useful for a broader group.

Consultation and focus testing A sub-point here (but VERY important) is the need not to make assumptions about your audience. You need to ask them what they want to know and what they want to do. Consultation and focus testing of what should be included in a publication are critical steps.

PURPOSE – KNOW WHAT YOU ARE TRYING TO ACHIEVE

Purpose closely follows audience as a priority for plain language and therefore in any standard.

Often in plain language guidelines purpose and audience are combined into one element. I think they should be separate. You need a distinct answer to 1. who are you writing for (audience) and 2. what you are trying to achieve (purpose).

I find that inexperienced writers often struggle to clearly define purpose. They have very broad definitions to give them flexibility but fail to focus them on a particular task.

EVALUATION – CHECK THAT IT WORKS

Plain language standards often don't directly mention evaluation. But if you accept my proposed definition then I think you need to include evaluation. You need a step that checks that your writing is doing what you set out to do – did the reader find the information that they needed and could they take action?

Also, the process of considering evaluation criteria (which should be part of the planning process) helps to clarify your purpose and focus your writing.

STRUCTURE – SUPPORT THE READER

Good structure that supports the reader's understanding is important on the printed page, but it becomes even more important when you start writing on the web. In this case it must include how the information is organised across different web pages.

I find that in legal writing for the public good structure is often missing. In this case restructuring a document to make it logical and grouping similar information together often addresses 80% of its issues.

LANGUAGE – BE CLEAR AND PRECISE

Language, well of course this is at the centre of plain language. There are the essential elements such as using simple words where possible, explaining jargon if you must use it, using the active voice where possible and short sentences and paragraphs.

I also add in to avoid abbreviations and acronyms. Lawyers like public servants love an abbreviation, which is fine if you are ‘in the club’ but for a member of the public unfamiliar with the topic abbreviations make it harder to make sense of new information and should be avoided.

Consistency of language also belongs here.

And, of course, precision. Judgement is certainly necessary here. I once argued successfully to remove the term ‘rescission’ and replace it with cancel in a publication on parking fines (I would explain the difference, but do I have enough words?). Yes, rescission was technically correct but did our readers understand the difference?

DESIGN – MAKE IT EASY AND USE SIGNPOSTS

Plain language is more than just about words and there is much research that highlights the importance of design in aiding understanding and increasing a reader’s motivation to read on. I am sure we have all looked at a document and been so put off by the way it looks – letters too small, paragraphs too large and the margins minute – that we don’t even bother to get to the first word.

Design must be included in the standard. Design that creates appeal in the document and helps signpost the reader to the information that they need (online and in print).

I always struggle to decide what is included in design. Certainly, things such as font choice, size, colour, white space etc. I also think this is where headings could be. They are structural, but they are also signposts.

OTHER CONSIDERATIONS

There are a couple of additional factors that need to be considered in the standard to fulfil the definition in an online environment:

- The need to consider search engine optimisation – helping to address factor one of the definition.
- Application of online accessibility standards.
- Linking to relevant material and where to take the next steps,
- Providing a date that the material was written or is scheduled for review.

Perhaps for some these factors are outside the scope of plain language as we know it. But, then again perhaps they are really indications of where plain language must head to remain relevant.

Where to now

As the information landscape changes around us it is important that we recast our view of plain language and the development of an international standard to reflect a greater preference for online information. We must move away from a focus on the printed page to a broader view of how people access information which includes on their phones, through websites, and other electronic means.

NOTES:

1 <http://www.abs.gov.au/AUSSTATS/abs@.nsf/Previousproducts/8146.0Main%20Features12004-05?opendocument&tabname=Summary&prodno=8146.0&issue=2004-05&num=&view=>

Plain design standards?



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By Karel van der Waarde

Introduction: Why design standards?

The definition of plain language incorporates design as a fundamental part of a communication. In this definition, 'design' could be interpreted as 'visual style' (as in the Dutch translation), or as 'the visible appearance'. I prefer – but this is by no means the only option – to define the noun 'design' as the visual presentation of language and structure. The verb 'design' is the process of developing this visual presentation. Neither the noun nor the verb are afterthoughts that can be separated from or applied to a finished text. The visual appearance is an integral part of both the information itself and of the writing activity. This is true regardless of what language you are working in.

The specialty of considering the visual presentation of information has many different names. Graphic design, visual communication design, document design, information design, UX-design, service design are some the main ones. All these specialties aim to make information visible in a way that enables specific groups to do what they need to do.

WHAT WOULD A PLAIN LANGUAGE STANDARD LOOK LIKE?

A plain language standard must focus on the ultimate aims of plain language: 'Making sure that people can easily find, understand, and use information'. This definition makes a combination of writing, designing, and testing desirable because plain language aims for a well-worded and well-structured text (= writing), a well-designed visual presentation (= designing), and it requires some form of reliable evidence that people can actually find, understand, and use the information (= testing).

Three questions about a plain design standard need to be answered:

- The results: What does the standard aim for? A standard must provide guidance to determine if a communication is really in plain language. It must therefore describe the people who can assess this, state specific criteria, and describe methods to evaluate the level of achievement.
- The process: What kinds of document-creation processes will achieve these results? A standard must provide instructions for a process that leads to successful plain language communications.
- The scope: Which documents should adhere to the standard? A standard cannot cover 'all types of communications in all languages in all circumstances' and it must therefore describe its boundaries and scope.

And a standard must be flexible enough to allow for alternative criteria, alternative processes, and inclusion criteria to make progress possible.

1 The results: What do potential users of a ‘plain language standard’ want to achieve?

I suggest at least six groups might use a plain language standard as an approach to develop and check information:

Group 1: Practitioners. People who develop the wording, structure, and design of a communication such as writers, designers, testers, and editors. This group could use a standard to support a process and as a guide to check if relevant success criteria have been met.

Group 2: Clients. Managers might use a standard to check if a communication complies, and at the same time relate it to strategic policies, costs, and production requirements. For many plain language communications, the client’s activities substantially rely on the successful use of information by intended readers.

Group 3: Regulatory affairs and legal departments. Those responsible for existing legislation and existing standards might look at a standard to check if a communication complies, and if there is any conflict with other laws or standards.

Group 4: The professional discipline. Standards raise the profile and status of a profession, and provide a basis for certification, accreditation, awards, and educational programmes.

Group 5: Readers, users. Ultimately, a standard should make it easier for intended readers to find, understand, and use information. This group is unlikely to apply this standard or use it to assess communication. However, this group provides the practical proof that information can be found, understood, and applied.

Group 6: A society. A society might use a standard to monitor longer-term consequences. A society can check standards and apply ethical considerations, such as the inclusion and exclusion of people related to gender, religion, and disabilities.

All six groups can legitimately claim an interest in plain language, and this listing seems applicable across languages. However, all six use very different and often mutually exclusive value systems. These value systems determine which criteria and facts are seen as relevant. Very crudely, the systems for these six groups are:

- professional knowledge and skills of writers, designers, and testers;
- costs and business or organizational strategies;
- laws and regulations;
- disciplinary status;
- usability; and
- societal values.

For every plain language project, the writers need to consider, prioritize, and balance the requirements and expectations of all these groups. A standard, or set of standards, should incorporate these six different perspectives and allow for some variation within each perspective.

It is clear that these six perspectives are fairly general. We likely need a secondary level of a standard to provide more details for each group because the aims and tasks of these groups differ. For group 1 – the practitioners – a description of elements could provide more guidance on the wording, structure, and design (Harris, Kleimann, Mowat, 2010). Fundamental design principles related to proximity (placing things together that need to be interpreted together), prominence (making the most important salient), sequence (determining an order of information) and similarity (making things with the same function look similar) can be provided here too.

Similar secondary guidance is probably needed for the other perspectives too. These could address how to:

- increase an organisation’s use of plain language,
- calculate its financial consequences,

- check if a document really complies,
- develop and assess accreditations, certifications, and awards
- involve people in the development process,
- test in different circumstances, and
- predict and respond to societal reactions.

2. The process: Which activities are essential to achieve results?

Developing a plain language communication integrates writing and design, and a standard needs to provide a step-by-step description of this process. Although experts have identified hundreds of descriptions of design processes (Crilly, Maier, Clarkson, 2008), those processes tend to share a pattern of at least six main activities (Sless, 1976/2006). This pattern can be applied in all languages; it is based on the activities of people in a specific situation and context.

1. **Observation and problem setting.** As a first step, observe and interview the intended readers, the client, and other people who handle available information. This step provides reasons to modify an existing situation into a preferred one and ensures the project is tackling a real problem. These observations also provide an opportunity to record and collect the terminology that the intended readers use in real life.
2. **Benchmarking.** Collect reliable data about the existing situations to ensure that intended readers view a change as an improvement. Base criteria selection on the results of the observations and the interviews. This data is also vital to monitoring progress in subsequent steps.
3. **Developing (writing, designing).** This is the core step in formulating, structuring, and designing a plain language communication.
4. **Testing and redesigning.** To check if information really can be found, understood, and used by the intended readers, involve intended readers in developing the communication. This can range from short and simple semi-structured interviews to full-scale usability experiments. These interviews give insights to places where contents or visual presentation need to be modified. The test results can also be compared with the benchmark results and used as a performance indicator.
5. **Implementing.** Some projects require an 'introduction process' in which the new documents are launched within an organisation.
6. **Monitoring.** And some projects – websites for example – require continuous monitoring to check if the performance levels provided by the benchmark studies and user tests are maintained.

Every plain language writing process will include activity 3. For the other activities, every project will have a scale from 'absolutely essential' to 'not required'. Whether to execute a step will be based on professional judgements, in relation to available time, available skills, budgets, and risks. For each of these activities, a plain language standard must provide instructions, protocols, and ethical guidance.

3. Which documents should follow the standard?

A plain language standard needs to be applicable to those communications where the intended readers do not have a real alternative. These are the obligatory and unavoidable documents that must be used by a reader to progress to a desired state. [Examples are exam papers, application forms for mortgages, immigration and identity papers, insurance documents, instructions for use]

The standard would also apply to documents that are crucial for a business's or organization's activities. Plain language communication could make it easier for organizations to fulfil their role and to reduce risks and failures. Examples might include websites, financial reports, terms and conditions, contracts, tax forms, medical protocols, and ballot forms.

And the standard should apply to documents that are legally required to be in plain language, such as medical leaflets, legislation, governmental communications and websites, as well as to communications that benefit a society at large, such as preventive medicines, sustainability, energy-savings, pollution reduction, and safety increases.

Concluding remarks

To include design in a plain language standard, it is essential to recognize that there are at least six different groups who can assess plain language results. Furthermore, there is a document-creation process that ranges from a single activity to a sequence of activities. Both the groups and the process are applicable across languages.

The approach sketched in this article leads to two sets of questions about plain language standards. The first set of questions addresses some practical issues:

- When do I have to apply the standard? What kinds of documents are included?
- Which criteria should I use? These criteria depend on the value system of the different group that can assess plain language.
- Which process should I use? For smaller projects, possibly only the core-step (writing | designing | testing) is required. Other activities can be added depending on the scale of the project.

And there are five fundamental questions about a standard:

- Do we really need a set of standards? What are the aims and benefits for each group?
- Does the application of a plain language process always lead to plain language in words, structure, and design? (How effective are plain language processes?)
- Is it true that intended readers can always easily find, understand, and use information if the wording, structure, and design are clear? (Are the results guaranteed?)
- If the intended readers successfully find, understand, and use the information, does that reliably lead to appropriate subsequent behaviour? (Does it predict reader behaviour reliably?)
- What are the longer-term consequences of improved performance? (Are the consequences considered?)

It seems possible to provide a set of related plain language standards that would support the tasks and aims of each of the six groups. Some parts of these standards can already be drafted. However, the questions listed above need to be further discussed by practitioners too. Available evidence needs to be collected and aggregated, and more specific research needs to be done to reach an evidence-based agreement.

Example of how the perspectives of the 6 groups might interact:

Writing and designing information about medicines for patients can be used as an example to show the six perspectives. The writers and designers can develop a text/design of information about a medicine for patients in plain language. The client – usually a pharmaceutical industry, a pharmacy-chain, or a hospital – needs to incorporate this text into its marketing and legal strategies, and provide a budget. The regulators check if information conforms to legislation, guidelines, and obligatory templates. There are several professional bodies (AMWA, CfPIE) that provide certification for medical writers based on knowledge, experience, and qualifications. Patients read the information and either take (compliance) or do not take medicines (non-adherence). And society considers sustainability, and discusses the costs and benefits of medicines. Each of these groups provides their own data about the ‘information about medicines’ from their perspective based on a different set of values.

Incorrect and ineffective medicine use is a very substantial problem. The consequences for each group when patients fail to find, understand, and use information are very different. Of course, patients suffer more if medicines are not taken, or are not taken in an effective manner. In the longer term, a society can't afford substantial non-adherence. The disciplinary status of professional bodies is

NOTES:

1 <http://www.iplfederation.org/>

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reduced, laws and regulations fail to support effective use sufficiently, clients miss profits, and practitioners have failed to provide a clear wording, structure, and design. These six perspectives - health, costs to society, status, legal compliance, profits, and plain language - do not share any common criterion. It is hard to satisfy all six, and the easiest and cheapest is just to fulfil the minimum legal requirements, thereby choosing to pay less attention to the other perspectives.

A standard must provide a plain language process that makes sure that the conflicting expectations and value systems can be considered and satisfied. In practice, this means that a set of standards would consist of:

- a. support for writing, designing, testing. [This will be based on the normal writing advice ('use familiar words'), design advice (anything between 9 and 12-point type-size is fine), and testing advice ('five interviews show 80% of the problems').] This also needs a description of the writing-designing-testing process.
- b. support for clients to check and a process to integrate plain writing in an organisation, including financial benefits and long-term strategy.
- c. support for regulators to make it as easy as possible to check if a communication really complies to the standard, and does not conflict with other standards.
- d. support for professional organisations to help a discipline develop. This would include guidance on accreditation, education, and awards.
- e. encouragement for the intended reader to get involved in developing communications. Unsolicited feedback, in combination with direct user involvement is essential. This is already in practice for the notification of side effects and websites: why not extend this to the notification of unusable information about medicines?
- f. support for groups within a society to make sure that a standard and communications are inclusive and sustainable.

Proposal of international plain language standards

By Dr. Claudia Poblete Olmedo

The diversity and characteristics of each language make it difficult to find criteria common to all of them that are an index of “universal” language clarity. However, in the following table, I point out some criteria that can be shared by several languages, and I use a hierarchical criterion of greater or lesser agreement between Spanish and other languages:

Standard	Explanation	Level of coincidence between more than one language with Spanish
Consider the document’s audience when writing.	Writing the document begins with reflecting about the audience for the text, and whether it is a private or institutional reader.	Higher level – has much in common with other languages
The document can be understood with one reading.	The clarity of the text allows one to understand when reading it once and in that reading find what is relevant.	
Paragraphs limited (not extensive) and with a single main idea.	This criterion is relevant in Spanish (and I think it must be in other languages since it responds to a universal cognitive characteristic that is the capacity of our short-term memory). The length of the paragraphs in the case of Chile’s laws is one of the phenomena that makes it more difficult for users to read the texts.	
Difficult terminology is defined or clarified in some other manner.	If the text uses difficult terms that are indispensable, they need to be defined through a glossary or clarified in some other manner, such as by including an example or rewriting the passage.	
Clear design	The appearance of the document supports the organization of the information so that the reader can easily find information they are looking for. Typographic resources are used optimally and hierarchically to aid in navigation and show which material is most important.	
Line spacing 1.5		
Font size greater than 12 points		
Use bullets to list requirements or main points.		
Use titles and subtitles to organize information		



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Standard	Explanation	Level of coincidence between more than one language with Spanish
Use the active voice.	This grammar option allows the reader to identify the agent of the action and therefore facilitates the reader's construction of the message.	While still applicable to many languages, these criteria may not be as generally useful as the above.
Use tenses and verbal modes that indicate certainty of the actions.	This criterion responds to the tendency of Spanish to use verbal forms not in common use, such as the future subjunctive, and that only complicate the material for users because they are not used in common speech or thought.	
Adequate and correct punctuation.	This standard is very relevant for the understanding of Spanish texts as well as text in many other languages. Correct use of the comma is particularly important to correct understanding. Inadequate attention to correct comma placement can generate ambiguities in texts that require the reader to read the text two or three times to understand it, and sometimes even then the reader misunderstands the intent of the writer.	
Write sentences mostly in subject, verb, object order.	Follow The logical order of forming sentences, subject or actor first, then verb, then object. This is applicable to Spanish and English, and probably many other languages as well.	
Test the document with the users.		

A plain language standard for Afrikaans

By Sarah Slabbert and Nadja Green
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Introduction

South Africa is a multilingual, multicultural society. It has 11 official languages, of which Afrikaans is one.

Written customer communication is mostly in English, but some companies reflect the multilingual nature of society in their customer communication. For example, MTN, a large mobile phone company, has a customer charter in English, Afrikaans, South Sotho, and Zulu. SA Taxi has developed customer communication in Zulu, which is the main language of the taxi industry. In the financial sector, companies also use Afrikaans, depending on their customer profile.

For this article, we were asked to indicate plain language standards that can be used for Afrikaans as a contribution towards the aim to develop international plain language standards that would apply across languages.

The literature identifies two distinct approaches to plain language: an outcome-based and an elements-based approach (Harris et al. 2010; Schriver et al 2010; Cornelius 2015). The article will explore the relationship between these two approaches and their relevance for a plain language standard for Afrikaans and international plain language standards.

The South African standard for plain language

Section 22 of the South African Consumer Protection Act of 2008 sets a South African standard for plain language. The standard is outcome-based, but it also stipulates the high-level elements that need to be used to achieve the outcome:

For the purposes of this Act, a notice, document or visual representation is in plain language if it is reasonable to conclude that an ordinary consumer of the class of persons for whom the notice, document or visual representation is intended, with average literacy skills and minimal experience as a consumer of the relevant goods or services, could be expected to understand the content, significance and importance of the notice, document or visual representation without undue effort, having regard to:

- The context, comprehensiveness and consistency of the notice, document or visual representation;
- The organisation, form and style of the notice, document or visual representation;
- The vocabulary, usage and sentence structure of the notice, document or visual representation; and
- The use of any illustrations, examples, headings or other aids to reading and understanding.

The outcome is not language-specific; it applies to all South African languages, including Afrikaans. It would probably also qualify as an international plain language outcome although one might want to state the outcome more clearly in verbs as: “to find, understand, and use the information” (Federal Government Plain Language



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Network 2011) or “feel, know, do” (Evans 2011) instead of “to understand the content, significance and importance”.

Section 22 implies user testing as a mechanism to assess if the outcome has been achieved; it does not prescribe it. The “Treat Customers Fairly” initiative of the Financial Sector Conduct Authority (previously the Financial Services Board) requires user testing for customer communication in the financial sector. But, by stipulating the target person who must understand the content, significance, and importance of the document, section 22 sets a standard for user testing: User testing should be conducted with a sample of consumers who:

- belong to the class of persons for whom the document is intended,
- have average literacy for the class of persons for whom the document is intended, and
- have minimal experience of the type of goods or service.

This could also be useful for international plain language standards.

The definition is less clear on what should be tested and how: “The target person is expected to understand the content, significance and importance of the document without undue effort.” An international plain language standard might want to give more detail.

The listed techniques or elements are high-level and not language-specific; they apply to all official South African languages, including Afrikaans. They could therefore be useful as international high-level techniques or elements to achieve the desired outcome.

Section 22 does not indicate how these elements should be translated into practical techniques to achieve the outcome. One could therefore ask if the English-based plain language techniques or elements have any place in the South African standard or international plain language standards? We will now try to answer this question with reference to Afrikaans by giving examples from the insurance sector.

Applying English plain language techniques to Afrikaans

Plain language techniques or elements that are specific to English are relevant for plain Afrikaans in the insurance sector because it is common practice to translate plain English policy wordings and customer communication from English to Afrikaans.

In general, most of the detailed plain language techniques or elements that apply to English also apply to Afrikaans, retaining the benefits of plain English. For example, the following criteria for the ClearMark awards as cited by Evans (2011):

- using the active voice unless there is a good reason for the passive; and
- moving conditions and qualifiers to the end of the sentence.

But there are linguistic differences between English and Afrikaans that affect the application of some plain language techniques. We will explain this with reference to three plain language techniques:

1. Avoids unnecessary multiple negatives (criterion for ClearMark awards as cited by Evans 2011) Afrikaans has a double negative, therefore multiple negatives.

For example:

English: *Any incorrect or missing information may result in claims not being paid out.*

Afrikaans: *Enige verkeerde of uitstaande inligting kan lei tot eise wat nie uitbetaal word nie.*

Impact on outcomes:

Feel: The double negative “multiplies” negatives in Afrikaans and exacerbates the effect of negativity on the attitude of the reader. For example, exclusions in insurance policy wordings are typically in the negative: “We do not cover...” In user testing that we

conducted, customers said that exclusions made them feel the wording only benefits the insurer and not them.

Know: If a main clause and the subordinate clause are both in the negative, the sentence would require at least three negatives which the reader has to interpret correctly.

ADAPTATION REQUIRED FOR THE PLAIN AFRIKAANS TECHNIQUE:

In Afrikaans, it is even more important to explore ways to put exclusions in the positive if you want to create a positive customer experience.

Examples:

Original English: *We do not compensate you for loss or damage to Household Goods that are not in the Home and Outbuildings.*

Original Afrikaans: *Ons vergoed u nie vir verlies of skade aan Huishoudelike goedere wat nie in die Huis of Buitegeboue is nie.*

Plain Afrikaans (the sentence is now in the positive): *Ons vergoed u slegs vir skade of verlies aan huishoudelike goedere wat in die huis of buitegeboue is.* (“We only compensate you for loss or damage to household goods that are in the home or outbuildings.”)

The legal department of the insurance company will always have to check this kind of change to make sure that it is equivalent to the intended meaning.

2. Keep the subject and verb close together in each sentence; use vertical lists to make a series of items easy to identify. (criteria of the ClearMark awards as cited by Evans 2011) The word order of complex sentences in Afrikaans is different from that of English and it is not always possible to keep subject and verb together. After certain conjunctions, such as *dat* (“that”) the verbs of the clause all move to the end and away from the subject.

Example:

English: *We do not compensate you if theft or attempted theft causes the loss or damage.*

Afrikaans: *Ons vergoed u nie as diefstal of poging tot diefstal die verlies of skade veroorsaak nie.*

The position of the verb phrase in complex sentences interferes with the lists within a clause that you typically get in insurance policy wordings.

Example:

English: *We compensate you for loss or damage to Household Goods caused by theft or attempted theft from:*

- a. *the Home;*
- b. *the Outbuildings, only up to the limit shown in the schedule unless you can prove that there are visible signs of forced entry or exit; or*
- c. *a building you are temporarily living in.*

In the original translated Afrikaans, the word order is incorrect to accommodate the list structure:

Ons vergoed u vir verlies of skade aan Huishoudelike Goedere wat veroorsaak is deur diefstal of poging tot diefstal uit:

- a. *die Huis;*
- b. *die Buitegeboue, slegs tot en met die perk in die skedule, tensy u kan bewys dat daar sigbare tekens is van geforseerde toegang of uitgang; of*
- c. *'n gebou waarin u tydelik woon.*

Impact on outcomes:

Feel: Although Afrikaans readers are getting used to bad translations in business writing, they appreciate correct and idiomatic Afrikaans. It shows respect for customers' identity and needs on the part of the insurer and helps to create trust in the insurer.

Adaptation required for the plain Afrikaans technique: Make sure that the introductory sentence to a list is grammatically correct. We have split the construction into two sentences to avoid the grammatical error and to make the condition explicit:

Ons vergoed u vir huishoudelike goedere wat gesteel of tydens 'n poging tot diefstal beskadig is. Die huishoudelike goedere moes op een van die volgende plekke gewees het:

- a. *Die huis;*
- b. *Die buitegeboue, maar in hierdie geval is die skadevergoeding beperk tot die bedrag in u skedule as daar geen sigbare tekens van geforseerde in- of uitgang is nie; of*
- c. *'n Gebou waar u tydelik woon.*

3. Where possible, adopt a relaxed, conversational style, rather than a stuffy bureaucratic style. Be simple and direct without being too formal. Use 'we' and 'you' (criteria for ClearMark awards as cited by Evans 2011) Afrikaans has two address forms: the informal jy ("you") and the formal u ("you"). There is no middle ground. In correspondence, the informal address form is Beste Johanna ("Dear Johanna"); the formal form is Geagte mev Muller ("Dear Mrs Muller"). Although the use of the informal form is increasing, probably due to the influence of English, it is, or was, not considered polite to address people older than you by their first name or as jy and jou.

These two forms pose a dilemma for the insurer who communicates with customers in Afrikaans. Which form should you use? The younger generation is more comfortable with the informal form; members of the older generation who have been customers for decades might feel offended by the informal form.

We have found that insurers tend to be inconsistent in their customer communication. Some letters would use the formal form; others the informal. It is also quite common to find letters that combine formal and informal forms as a compromise. The examples below were taken from correspondence of the same insurer with the same customer.

Beste mev Muller

...Skakel ons gerus as u enige vrae het. ("Please contact us if you have any questions")

Beste mev Muller

Skakel ons gerus as jy enige vrae het. ("Please contact us if you have any questions")

Geagte kliënt

Dankie dat u ons gekies het as u korttermynversekeraar. ("Thank you for choosing us as your short term insurer.")

Beste Polishouer

Ons wil altyd seker maak dat jy die beste dekking het. ("We always want to make sure that you have the best coverage.")

Impact on outcomes:

Feel: The inconsistency indicates to a customer that the insurer is unable to match their profile with the appropriate style and tone of voice. Or, that the insurer has no idea what the appropriate style or tone of voice is, or doesn't care. None of these make for good customer relations.

Action required to develop a plain language technique for Afrikaans: Test the appropriateness of the various formal-versus-informal configurations of address forms with the target audience and apply consistently to achieve the desired outcome.

Conclusion

The South African plain language standard suggests three aspects that international plain language standards need to include: a universal outcome, high-level techniques or elements to achieve this outcome, and a method to assess if the outcome has been achieved for a specific piece of communication.

The examples from Afrikaans suggest that international plain language standards need to state that each language will have to 'translate' the high-level plain language elements into language-specific techniques and research their contribution to the outcome.

Together, these language-specific techniques could contribute to a body of research-based techniques that supports international plain language standards. Interesting synergies might develop from these.

The examples from Afrikaans furthermore demonstrate the importance of user testing as the only way to assess the impact and to find the best way to achieve the desired outcome.

Unfortunately, insurers in South Africa are still reluctant to spend money to test if their documents meet the plain language outcome. They are even more reluctant to do this for translated documents.

Sources

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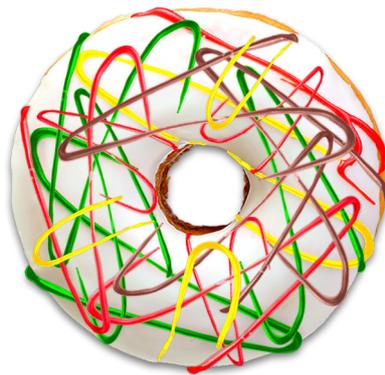
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