Plain Language

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Washington State Dept of Revenue
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What is Plain Language/Plain Talk?

Plain Talk is writing clearly so your audience can understand, after one read, the message you are sending and what they need to do.
What is Plain Talk?

- Plain Talk is not deleting complex information to make a document easier to understand.
- For your reader to make informed decisions, complex information must be provided.
- Plain Talk assures that the complex information is presented clearly and orderly so that it can be understood.
Brownie Fudge

4 squares (1 ounce each) unsweetened chocolate
1 cup butter or margarine
2 cups sugar
4 eggs
1 cup all-purpose flour
1 cup chopped walnuts
2 teaspoons vanilla
Fudge Topping (recipe follows)


Makes about 9 dozen brownies
What is Plain Talk?

• Plain Talk is deciding what your reader needs to know before words and sentences are even considered.

• A Plain Talk document doesn’t contain unnecessary words, and is written at the reader’s level.

✓ Sentence structure is tight.

✓ Tone is welcoming and direct.

✓ Design is visually appealing.

Adapted from the Security and Exchange Commission’s “A Plain English Handbook”
Let Us Clean Your Teeth!

It's a whole lot easier!

Olympia Pediatric Dentist
2612 Yelm Highway SE • Suite A
Olympia, WA 98501
(360) 352-3515

Just a reminder...

It is time for your regular dental check-up. Please call to schedule an appointment.

Thank You!
State and federal support of clear writing

- 2005 – Washington Governor Gregoire issues “Plain Talk” Executive Order
- 2010 – President Obama signs the Plain Writing Act of 2010
- 2011 – President Obama issues Executive Order requiring regulations to be written in plain language
How did we get here?

• We learned to talk at home. **Success** was being understood.

• We learned to write in school. **Success** was impressing our teacher and getting an A.

• At the Department of Revenue, **success means your readers get the message you intended to send.**

• We must write to **inform** not to impress.
Plain Talk is smart business

When customers don’t understand documents, you may have to:

✓ Answer phone calls
✓ Correct customer mistakes
✓ Write follow-up letters to explain
✓ Develop background materials
✓ Litigate issues
Plain Talk is smart business

We can write documents that are:

✓ legally accurate and sufficient.
✓ clear and usable.

These documents provide:

✓ better customer communication and understanding.
✓ increased compliance.
✓ improved customer service.
Choosing your documents

Things to consider:

✓ Agency business goals
✓ Documents that are hard to understand
✓ Documents with broad circulation
Who should be involved?

• Plain Talk writer
• Customer experts
  ✓ Know the questions customers have after reading the letter
• Policy expert or legal counsel
• Management
  ✓ Approves new letter and makes sure it gets used
Six steps

1. Plan your letter and write to your reader
2. Focus on people
3. Use short, simple sentences
4. Use words readers know
5. Organize information in logical order
6. Make the text visual
Step 1 – Plan Your Letter

What’s the story?

✓ What do you want to achieve? (purpose)

✓ Who is the letter going to? (readers)

✓ When, where, why, and how will they read the letter? (Scenarios of use)
WASHINGTON DRIVER LICENSE

LIC # SHIMK2E270KT EXP 02-30-2015

SHIMABUKURO, JANET E
7257 RIDGE PRAIRIE DR
OLYMPIA WA 98516-2757

CDL END RES C

SEX HT WT EYES BRN
F 5-08 145 BRN

ISSUE DATE 05-14-2000

DOB 03-31-1973

Handwritten Signature
Step 2 – Focus on People

• Help readers see themselves in the text
  ✓ Use words like “I, me, we, our, ours, you, your”

• Use personal pronouns or name the person doing the action
  ✓ I am writing in response…
  ✓ Suzy Smith will contact you…
  ✓ You may copy this certificate…
Exercise 1
Using personal pronouns
Step 2 – Focus on People

• Use action verbs
  ✓ Affix a signature = sign
  ✓ Make payment = pay

• Look for nouns that hide verbs
  ✓ denial = deny
  ✓ maintenance = maintain, keep up
  ✓ assignment = assign
  ✓ failure = fail
Step 2 – Focus on People

• Write in active voice
  ✓ Active = “who is doing what to whom”
  ✓ Passive voice:
    • Form C must be completed by all homeowners.

• Active voice:
  ✓ All homeowners must complete Form C.
  ✓ You must complete Form C.
Exercise 2
Changing Passive to Active
Step 3 – Short, Simple Sentences

- Keep each sentence to one thought – or two tightly connected thoughts

“If you have to read a sentence more than once to understand it, it is too long.”
Step 3 – Short, Simple Sentences

Avoid unnecessary words

- ✓ Weak: The purpose of this letter is to tell you that we have accepted your claim...

- ✓ Strong: We have accepted your claim...

- ✓ Weak: There are three forms that must be completed.

- ✓ Strong: You must fill out three forms.
Step 3 – Short, Simple Sentences

Think about the order you want to give the message

**Before:**

Interested persons, on or before March 1, 2015, may submit to the Hearing Clerk written comments regarding this proposal.
Step 3 – Short, Simple Sentences

Think about the order you want to give the message

**After:**

We invite you to comment on this proposal.

Send comments to:

   Hearing Clerk
   PO Box 400
   Olympia, WA 98501

*Deadline: March 1, 2015*
Exercise 3
Untangling Sentences
Step 4 – Use Words Readers Know

Use short and simple words

✓ cease = stop

✓ prior to = before

✓ procure = get

✓ remit = send, pay

✓ retain = keep

✓ terminate = end
Step 4 – Use Words Readers Know

Use short and simple words

✓ commence = ?

✓ employ = ?

✓ furnish = ?

✓ inquire = ?

✓ transmit = ?

✓ utilize = ?
Michael Scott offers his wisdom
Step 4 – Use Words Readers Know

Avoid "legalisms"

✓ aforesaid = the
✓ pursuant to = the law says
✓ said “person” = the “person”

Define terms, if necessary
A lien may be claimed for all professional services, materials or equipment furnished after a date that is 60 days before this notice was given to you or mailed to you, unless the improvement to your property is the construction of a new single-family residence, then 10 days before this notice was given to you or mailed to you.
Step 4 – Use Words Readers Know

Use “must,” “may,” “should” appropriately. Do not use “shall” in letters.

✓ For obligation, use “must”

✓ For permission, use “may”

✓ For a strong suggestion, use “should”

✓ For a physical possibility, use “can”
Step 5 – Organize information in logical order

• Add a reference line
  ✓ gives a quick view of the main point

• Chunk information
  ✓ separates information into manageable pieces

• Use bold headings and white space
  ✓ help users locate information
Step 5 – Organize information in logical order

**Beginning**

- ✓ reference line
- ✓ context – if needed, give a brief context-setting, background statement
- ✓ main point – right up front, even if it is bad news
- ✓ overview – what’s in this letter (if it is long)
Step 5 – Organize information in logical order

**Middle**

What users need to know in logical order

✓ tell user what to do

✓ answer questions user will have

✓ inform of rights (appeal, privacy, others)

**End**

✓ where to get more information

✓ whom to call if user needs
Yes, but there's not that much work for BLS-TPS itself:

Some, but not all of the affected licenses operate through BLS (profit corporation renewals for Secretary of State, several of DOL's business licenses, and DOH's Shopkeeper and X-Ray Facility business licenses). A percentage of the transactions will occur online and have the money collected by credit card (see expenses below).

Expense Impact:
A somewhat loose end still exists in determining how to pay the cost of collecting part of the revenue by credit card (actually who ends up paying the cost) and whether/how BLS will bill that cost for reimbursement. That total cost between all the licenses for all three agencies involved could be between $15,000-$20,000 annually.

Other, Implementation expenses (see implementation below) are absorbable.

Implementation Impact:
The BLS-I.S. division would be primarily impacted in order to do the system set-up to accommodate the $10 and 3% surcharges as appropriate. BLS-TPS staff would be involved in making some minor computer table entries and assisting in the final testing of the funding changes made by I.S.

After implementation, there would be additional, pass-through revenue processed by BLS applicable to the affected licenses which would be deposited by journal voucher into the appropriate dedicated fund (automated process for BLS, an added manual step for DOR's fiscal staff).
Exercise 4
Create strong reference lines
Step 6 – Make the Text Visual

The design of your document is the first thing your reader sees.

✓ Lots of text
✓ Blocky
✓ Not scannable
✓ Not respectful of the reader’s time
✓ Not a very good first impression
Step 6 – Make the Text Visual

Good design lets information flow

- Good design lets information flow
- Header clearly identifies purpose
- Short paragraphs create white space
- Content is easily scanned by reader
- Bold, clear subheads help reader find information
- Respectful of the reader’s time
Step 6 – Make the Text Visual

- Use lists and tables whenever possible
- Use bulleted lists for items/conditions

Before:

In addition to your application, please include:

your resume, references, work samples, and photograph.
Step 6 – Make the Text Visual

After:

Please submit:

✓ Your application
✓ Resume
✓ References
✓ Work samples
✓ Photograph
Step 6 – Make the Text Visual

Use numbered lists for instructions

1. Complete the form.

2. Sign and date it.

3. Mail it in the enclosed envelope.
We will redeliver OR you or your agent can pick up your mail at the Post Office. (Bring this form and proper ID.
If your agent will pick up, sign below in Item 2, and enter agent’s name here):

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
</table>
| 1. | a. Check all that apply in section 3;  
|    | b. Sign in section 2 below;  
|    | c. Leave this notice where the carrier can see it. |
| 2. | Sign Here to authorize re-delivery or to authorize an agent to sign for you: |
| 3. | Redeliver (Enter day of week): |
|    | [ ] |
|    | Signature |
|    | [X] |
|    | Printed Name |
|    | 7204 Prairie Ridge |
|    | Delivery Address |
|    | USPS |
|    | [ ] Refused  [ ] Forward  [ ] Return |
|    | 5293 0496 2758 9355 |

PS Form 3849, July 2013 (Reverse)
Step 6 – Make the Text Visual

Make the lists parallel

**Before:**

Individuals applying for permits must

- ✓ be 21 or older
- ✓ shall have a valid driver’s license
- ✓ residency in this state is required
- ✓ not have drunk driving convictions
Step 6 – Make the Text Visual

Make the lists parallel

**After:**

Individuals applying for permits must be

- ✓ 21 or older
- ✓ a legal resident of the state

They must have:

- ✓ a valid driver’s license
- ✓ no conviction for drunk driving
Step 6 – Make the Text Visual

First draft of our Amnesty Application

• Used another state’s amnesty form as a template.

• Users found it difficult to complete.

• We asked ourselves:

  What is the least amount of information a taxpayer can provide that will allow us to process their application?
Step 6 – Make the Text Visual

Final Amnesty Application

- White space makes the form less intimidating
- We asked for only basic information
  ✓ Business and contact information
  ✓ Amnesty periods
  ✓ Payment information
  ✓ Signature and date
Step 6 – Make the Text Visual

**Good design checklist:**

- Can your reader scan for information?
- Do you use headers?
- Is there white space?
- Do you use bold text appropriately?
- Is the data visual? (bullets, tables, charts, or graphs)
### Readability Statistics

<table>
<thead>
<tr>
<th>Counts</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Words</td>
<td>1001</td>
</tr>
<tr>
<td>Characters</td>
<td>5406</td>
</tr>
<tr>
<td>Paragraphs</td>
<td>51</td>
</tr>
<tr>
<td>Sentences</td>
<td>48</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Averages</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sentences per Paragraph</td>
<td>15</td>
</tr>
<tr>
<td>Words per Sentence</td>
<td>16.4</td>
</tr>
<tr>
<td>Characters per Word</td>
<td>5.2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Readability</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Passive Sentences</td>
<td>18%</td>
</tr>
<tr>
<td>Flesch Reading Ease</td>
<td>32.9</td>
</tr>
<tr>
<td>Flesch-Kincaid Grade Level</td>
<td>12.0</td>
</tr>
</tbody>
</table>
Usability Testing

You think your document is clear, but you:

✓ Know the material
✓ Work at the agency
✓ Know the language

Is the customer like you?
Usability Testing

Usability testing observes a typical customer’s behavior:

Can they find what they need and understand what they find?
What is Usability Testing?

- One-on-one meetings with representative customers
- 15 min to one hour long
- Participant reads a scenario
- Reads sections aloud
- Paraphrases in own words
- Answers factual questions about what they read
Usability Test in action
Who should you test?

• It is best to select people who represent the customers receiving the document

• A range of ages, familiarity with the program, education, responsibility

• 4 -10 people
What you can learn

• Words people don’t understand
• Words with different meanings
• Sentences too long or tangled
• Information customers still need
• Information that is not important
• Information not in the order or format expected
The Department of Revenue routinely reviews the reporting practices of registered taxpayers to ensure proper reporting. We are contacting you with this reminder because, according to our records, you have not recently reported any **use tax** on the Combined Excise Tax Returns and may have overlooked a tax obligation.

Therefore, please take some time to review your purchases made since January 1, 1998.
According to our records, you have not recently reported use tax on your Combined Excise Tax Returns. Because businesses engaged in similar activity typically owe use tax, we are asking you to review your purchases for possible unpaid tax.
Examples of Rewrites

Before

RE: Records request received date received name of company requested nature of material requested

Dear name of individual:

Thank you for your public records request. Pursuant to RCW 42.17.320, we are informing you it has been received and we estimate a further response to you by mail within thirty (30) days. Although we hope to complete your request number 11________ as soon as possible, we are making allowances for variables such as file availability, increased request demand, computer system downtime and unforeseen staff shortages. If an inspection of file information would serve your needs better than a response by mail, feel free to contact us to arrange a file inspection appointment.

After

RE: Request received date Subject: (Description of information requested)

Dear name:

We received your public records request and are now searching for the materials you requested. We will respond in 30 days to let you know:

- If the records are available.
- If any of the records will be withheld for legal reasons.
- If copy charges will apply and, if so, the amount.
Examples of Rewrites

September 24, 2014

What is this email about?
CTS has informed us that they have seen an increase of CryptoWall malware infections across the state government network. CryptoWall is ransomware that seeks out and encrypts documents on the infected machine and any connected shares or drives. The encrypted files are held ransom for a fee.

CryptoWall malware is distributed through spam emails, malicious advertisements on legitimate websites, and as fake updates for applications such as Adobe Reader, Adobe Flash, and Java.

What do you need to do?
- Be wary of all attachments and links in emails.
- Never open email attachments if you are unsure about the origin or reason for the attachment.
- Even if you receive an attachment from a friend or coworker, think twice before opening.
- Remember not to visit untrusted websites or follow links provided by unknown or untrusted sources.
- Remember to be cautious when clicking on links in emails coming from untrusted sources.
- Remember not to download suspicious or unauthorized programs.

What Information Services is doing?
We are blocking known CryptoWall IP addresses and websites at our internet filtering appliances. CTS is monitoring the email gateways for suspicious emails.

What if I have questions?
If you have any questions, concerns, or need assistance please contact the I.T. Help Desk at 360-596-3600.
Examples of Rewrites

Before

Date

Dear Claimant:

The account(s) you are filing a claim for were reported to our office listing the account as being setup under the Uniform Gift to Minors Act (UGMA), the Uniform Transfer to Minors Act (UTMA) or was being held in trust (ITF).

(See Original Owner Name in Box “B” of the claim form)

We need proof that the person who these funds were being held for has not reached the age of 18 for ITF accounts or 21 for UGMA or UTMA accounts. The proof could be a copy of a driver’s license, birth certificate, or current student ID card.

If the individual is over the age of 18 or 21 depending on how the account was reported they should now file the claim.

If you are aware of any special restrictions placed on the account please provide copies of additional documents such as: trust papers, guardianship papers, power of attorney, or others you determine are appropriate.

Please return all of the previous documentation plus any new material requested.

Thank you,

Tax Service Representative

After

Date

Please provide proof of age

Dear:

We received your claim form. This account was originally set up with a child as the account owner. We need to know the current age of this individual. If the individual is under the age of 18, we need proof of age. If the individual is over the age of 18, they must file their own claim form.

18 years of age and under

Please send a copy of one of the following in the enclosed envelope:

- drivers license
- birth certificate
- current student identification card

Over 18 years of age

The account owner must:

- make changes to the form enclosed and resubmit it.
- call our office at 1-800-435-2429 for a new claim form.

If you have questions

Call me at (360) ________.

Sincerely,
Examples of Rewrites

Before

Tax Registration Number: 999 999 999

Dear (Name):

Effective July 1, 2005, the city of Des Moines has imposed a Special Hotel/Motel tax of 1 percent. This Special Hotel/Motel tax is to be collected in addition to the retail sales tax. This tax is collected on the charge made for the furnishing of transient lodging by hotels, bed and breakfasts, rooming houses, motels, campgrounds, etc. Transient lodging is defined as the rental of lodging for periods less than 30 consecutive days. (See Rule 166 enclosed).

In order for the city of Des Moines to receive their tax distribution, please complete the “Special Hotel/Motel Tax” section on the back of the tax return and add the tax due into the total tax due on the front. Additionally, you should also continue to fill in the Transient Rental Income Information Section with your local four-digit location code and transient lodging income.

Thank you for your cooperation and assistance. If you have any questions, please call me at (360) 666-6666.

Sincerely,

Enclosure

After

Tax Registration Number: 999 999 999

You must collect a new tax beginning July 1, 2005

Dear (Name):

Beginning July 1, 2005, you must collect the Special Hotel/Motel tax in the City of Des Moines.

How much is the new tax?

The new Special Hotel/Motel tax is 1 percent. It will change the retail sales tax rate you charge your customers from 8 percent to 9 percent.

How do I collect the tax?

Apply the new 9 percent tax rate to charges for transient lodging. Transient lodging is the rental of lodging for periods less than 30 consecutive days. (See Rule 166 enclosed or visit http://der.wa.gov.)

How do I report the tax?

On future tax returns, you must:

1. Complete the Special Hotel/Motel Tax section.
2. Add the amount of the Special Hotel/Motel tax to your Total Tax Due.
3. Continue completing the Transient Rental Income Information section.

What if I have questions?

You may contact me at (360) 666-6666.

Sincerely,

Enclosure

Taxpayer Account Administration Division
P O Box 47476 ♦ Olympia, Washington 98504-7476
Getting Started

• Clearly define goals and communicate expectations

• Provide staff training so everyone is on the same page

• Designate “go to” people who are accessible and knowledgeable

• Look for small successes and aim for continuous improvement
  ✓ Better response rates
  ✓ Shorter cycle times
  ✓ Increased revenue
  ✓ Improved customer satisfaction
Building Project Framework

- Agency Policy
  ✓ Standardizes letterhead, layouts, fonts, etc

- Agency Style Guide

- Forms/Letters Tracking System
  ✓ Catalogs existing letters/documents
  ✓ Maintains version control – pre/post
  ✓ Standardizes flow of letter through review and implementation
  ✓ Provides management reports
Lessons Learned

• Support from the top is critical!

✓ Make sure your top managers are plain language champions

• Flexibility is important – evaluate your approach and adjust if necessary

• Communicate and celebrate your successes!

✓ Share good examples with staff
Plain Talk resources

Washington State Plain Talk website
http://www.governor.wa.gov/issues/reform/plaintalk/resources.aspx

The Gregg Reference Manual

Federal Plain Language website
http://www.plainlanguage.gov/

Center for Plain Language
http://centerforplainlanguage.org/
“I don’t have time to write you a short letter, so I’m writing you a long one instead.”

Mark Twain
Questions?