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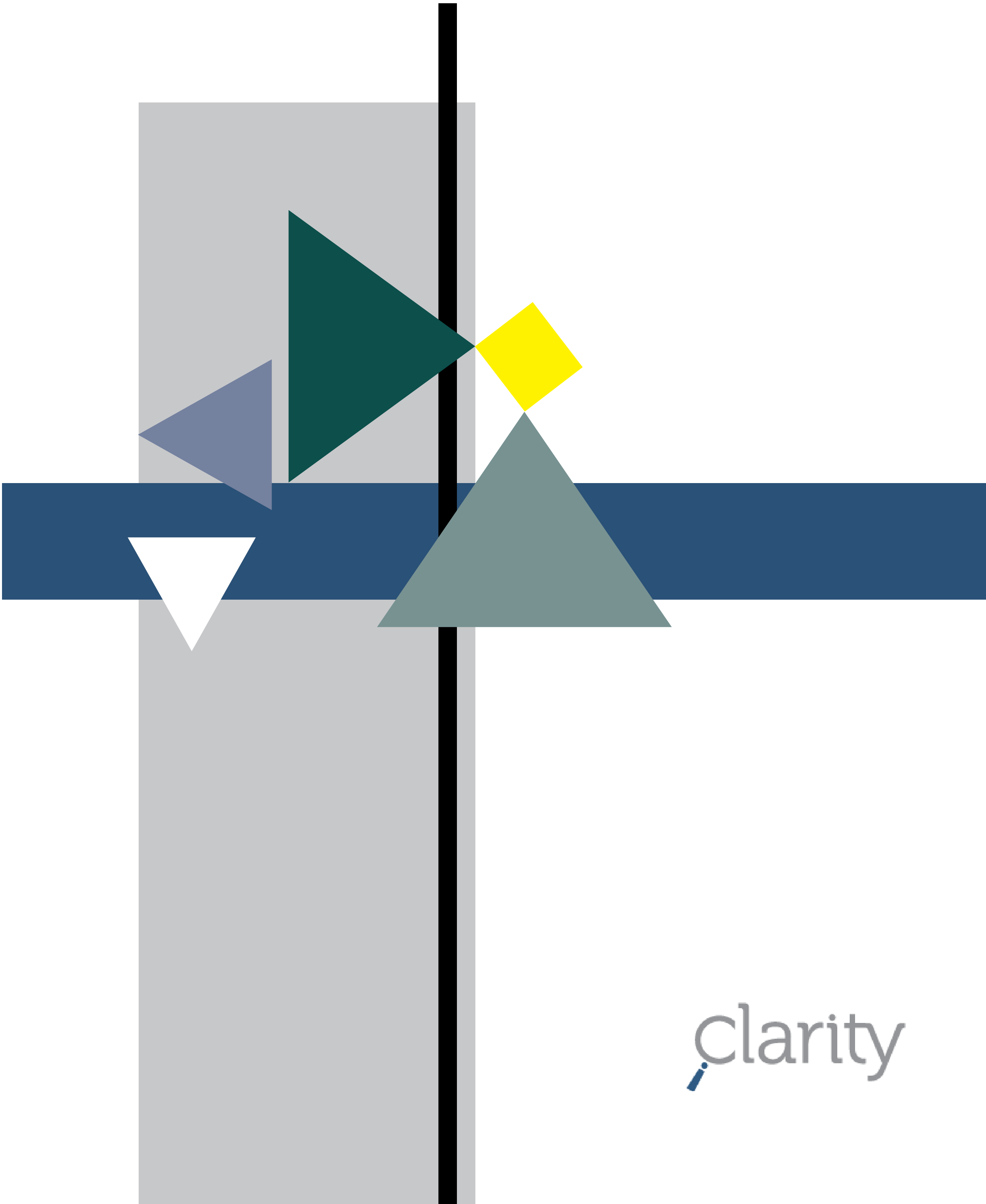

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The Clarity Journal is published about twice a year.

Submissions We encourage you to submit articles to be considered for publication in Clarity. Send submissions directly to the editor in chief at Editor@clarity-international.org. Please limit submissions to no more than about 3,000 words.

Guest editors

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Contents

In these issues

Access for All: Plain language is a civil right, which took place in October 2020 and May 2021, was a new kind of conference.

- For the first time, Clarity, the Center for Plain Language, and PLAIN joined forces to cohost an international conference.
- For the first time, plain language advocates from around the world met completely virtually – watching thought-provoking talks, tuning in to live interviews, and meeting in World Cafes.
- For the first time, the focus was completely on increasing access – to justice, to health care, and to myriad other basic human rights – through plain language.

In the midst of a pandemic, we found ourselves inventing a new type of conference and pushing new boundaries in both our presentation and our topics.

So it should come as no surprise that these two issues (83 and 84) of *The Clarity Journal*, which revisit key speakers from the *Access for All* conferences, also pushes boundaries. The articles are interesting, thoughtful, and—at times—provocative. And although the articles cover a range of topics, they all ask us to return to the theme of "access": Who has it? Who doesn't? How do we increase it? And, how can we—as plain language advocates—help ensure access for **all**?

From the President

Julie Clement
Clarity President

I hope you are staying safe. The world can be a very dangerous place, even more so during the past few years. Yet for many of the people we serve, danger is a constant element. In our effort to communicate, it's easy to focus on what we want to say and to forget that communication only works if we can truly understand what our readers need.

These conference issues of *The Clarity Journal* invite you – *our* readers – to immerse yourself in the "intended reader" element of the definition of plain language. These are not typical Clarity journal issues. Instead of papers that tend to focus on wording, structure, and design, these issues focus on *outcome*: Can the most vulnerable of our intended readers easily find what they need, understand what they find, and use that information?

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

A secondary thread that runs through nearly all of the articles in these two issues is the importance of testing and research. I hope you're as excited as I am about all of the research being done in our field.

Even if these articles fall outside the specific work you do, I know you'll find countless lessons that do apply to your own use of plain language principles. Let me know what you think.

Clarity 2022 – Tokyo

Take a look at the back cover of this issue if you haven't already done so. Doesn't it make you want to hop on a plane and get to Japan? We are thrilled to be holding the first international plain-language conference in Asia later this year. I hope to see many of you in Tokyo.

As I write this, we plan to hold an in-person conference – the first since our 2018 conference in Montreal. But Covid is still creating challenges. Conference organizers (Japan Plain English & Language Consortium) will make a final decision by June 20, based on whether Japan is open to visitors for an event like this. If not, the conference will be virtual.

(We will hold our biennial membership meeting during the conference. Please let me know if you would like to submit your name as a board member.)

ISO plain language standard

After 3 years of work, we hope to have a decision later this year. I'm so excited about the opportunities this will create for the plain-language world. Thank you for all your hard work in this field and for staying the course.

Meanwhile, the International Plain Language Federation (IPLF) continues to work on plain-language education and certification, topics we identified as priorities in Clarity 64.** Committee chairs include Lynda Harris (New Zealand), Lisa Vieno (U.S.), Katherine McManus (Canada), and Neil James (Australia). Let me know if you'd like to help.

The IPLF also has an active committee, chaired by Gael Spivak (Canada), working on localization and implementation of the ISO standard. Much work needs to be done to ensure the standard is adopted by as many local standards organizations as possible. The committee has identified those country-specific organizations and is working with volunteers to ensure a well-planned and well-supported effort once the standard is approved. We can use your help, so contact me if you'd like to be part of this game-changing (almost) achievement in your own country.

The Clarity Journal

Editing the journal is a big job. (I did it for more than a decade, so I know!) Unfortunately, Thomas has stepped down, so we will be looking for a new editor. Ideally, the journal would be managed by a team of volunteers. So (again) if this is something that interests you, please let me know.

Meanwhile, I'd like to take the journal back to our roots for the next issue. One of the features our early journals included was before-and-after examples of plain legal documents. So I'm looking for Clarity members to submit short articles about legal drafting, including before-and-after examples of entire documents (short ones) or even excerpts from contracts, legislation, and similar legal documents. Contact Editor@clarity-international.org with your proposals.

What are some of the other regular features you would like to see in the journal? Just let me know!

That's a lot! Thank you for taking the time to read this lengthy letter. Please stay safe and well, friends. And I look forward to seeing you in Tokyo in September!

With warm regards,

Julie Clement

The right to a voice

Sarah Slabbert, Nadja Green, and Iske van den Berg

Sarah and Nadja represent South Africa on the ISO working group that is developing the draft ISO Standard for Plain Language (Technical Committee 37, Working Group 11). The Standard is expected to be finalized by mid-2022.

Introduction

Despite one of the most progressive constitutions in the world, South Africa is still trying to address its legacy of inequality. This article illustrates the role of plain language to empower previously disadvantaged people.

Access for all: what does it mean in the South African context?

According to the National Development Plan,[1] "the [South African] Constitution provides a vision of a united, prosperous, non-racial and non-sexist society; a country that belongs to all who live in it, united in its diversity. The Constitution also obliges the country to heal the divisions of the past, recognising that South Africa emerged from a system where the majority of its citizens were robbed of opportunity".

The right to access can be regarded as the cornerstone of the South African Constitution. The words ''access'' and ''accessible'' appear 32 times in the Constitution, referring, for example, to the following:

27. (1) Everyone has the right to have access to—

(a) health care services, including reproductive health care;

(b) sufficient food and water; and

(c) social security, including, if they are unable to support themselves and their dependents, appropriate social assistance.

32. (1) Everyone has the right of access to—

(a) any information held by the state; and
(b) any information that is held by another person and that is required for the exercise or protection of any rights.

The right to access should also be seen in the context of redressing past discrimination, which is specifically mentioned in the Constitution with reference to the right to property and education. For example:

29 (2) Everyone has the right to receive education in the official language or languages of their choice ..., taking into account—

(a) equity;

(b) practicability; and

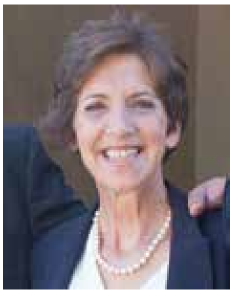
(c) the need to redress the results of past racially discriminatory laws and practices.

11 official languages

Afrikaans and English are the colonial languages, the other nine official languages belong to the Bantu language family: Sepedi, Sesotho, Setswana, siSwati, isiNdebele, isiXhosa, isiZulu, Tshivenda, and Xitsonga. Sepedi, Sesotho and Setswana are Sotho languages; siSwati, isiNdebele, isiXhosa and isiZulu are Nguni languages. Sotho and Nguni languages are mutually intelligible respectively.

English is the business language and is also widely used by government and the media. Yet, it is the home language of only 8.1% of the South African population.

(See Note 2 for reference.)



Sarah Slabbert is managing director of BHI32, a communication design and research consultancy. The company's expertise lies in the development field and the water sector. Through BHI32's work in the public sector, Sarah learned how ordinary South Africans make sense of complex information. She founded the Plain Language Institute in 2009 to build on this experience.

Sarah holds a PhD in Sociolinguistics. As an academic researcher, she has published a book and numerous research articles.

If not in the office, you will find her on her road bike and MTB.

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1 https://www.statssa.gov.za/wp-content/uploads/2013/07/NDP-2030-Our-future-make-it-work.pdf

Accessible communication that reflects the realities and needs of the audience is integral to providing people access to health care, education, and other basic human rights. The relevance of plain language, and specifically plain English, is evident, as most of the official communication is in English.

This article discusses two examples. Both relate to access to safe water and sanitation.

Handwashing communication in South Africa

This example illustrates the importance of the first principle of the draft ISO Plain Language Standard: Readers get what they need (relevant) (Balmford et al., 2018). It is essential to understand readers and their needs when one creates a document in plain language. In other words, to give readers what they need, the message must match their reality.

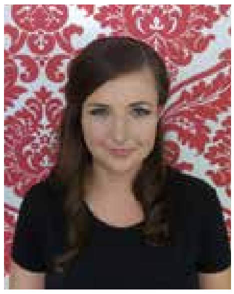
COVID-19 has affected and is still affecting South Africans across the socioeconomic spectrum. During the lockdown, one of the main health messages to stop the spread of COVID-19 was, and still is: Wash your hands!

With the World Health Organisation's (WHO) communication as basis, the South African government and employers launched a mass communication campaign that implored South Africans to wash their hands: Under a running tap, for 20 seconds, with soap. Or to clean their hands with sanitizer.

Figure 1: Covid-19 handwashing communication

Yet the water and sanitation realities of many South Africans look very different from the one depicted in the message. According to Statistics South Africa's General Household Survey (GHS) of 2019:[2]

- 55.1% of households (9.46 million households) **do not** have access to running water inside their homes.
- 12.2% of households (2.095 million households) get water from a public or communal tap and have to carry it in containers to their homes.
- 25.8% of households reported water interruptions that lasted more than two days at a time or more than 15 days in total in 2019.
- 5.526 million households use a pit toilet.
- 65.9% of households had access to a handwashing facility.
- Only 43.6% of households reported that they wash hands with soap after using the toilet.



Nadja Green is responsible for Plain Language writing, strategy development and research at the Plain Language Institute. She holds a Masters degree in Communication Management. She is also a qualified teacher with teaching experience.

In 2018, Nadja conducted a study among four short-term insurance companies to determine how they implement Plain Language in their organizations. She developed an implementing framework for Plain Language based on the results.

In her spare time, Nadja loves watching documentaries and playing simulation games.

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2 http://www.statssa.gov.za/publications/P0318/P03182019.pdf

Iske van den Berg is the managing director of the Corporate Research Consultancy, a firm specializing in qualitative research. Iske holds Masters degrees in Business Leadership, and Afrikaans and Dutch. Her work focuses on financial, socio-political, sociolinguistic, communication and media research. When not working, you will find Iske in nature, exploring beautiful South Africa.

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Figure 2: Communal and yard taps in rural and urban South Africa

Even though the handwashing messages did not match their reality, people without running water or a drain improvised their practices to meet the requirements.

Figure 3: Handwashing solutions without running water

For others, the COVID-19 handwashing messages were irrelevant and could not be applied at all:

- "I can't afford soap every month." Respondent from Limpopo province in a study to enhance water and sanitation insights.[3]
- "This water is for us to eat. We travel about 20km [and] pass three villages on foot to get this water. So, we can't waste this water on washing hands."[4]

During the 2020 lockdown, we alerted the Water Research Commission (WRC) of South Africa to the fact that the official health communication was excluding people without running water in their homes. The outcome was a fact sheet and an infographic that focused on scientifically correct health information for people without running water. The WRC shared the fact sheet and infographic with the Departments of Water and Sanitation and Health to apply in their mass communication campaigns.

Subsequent interviews with people without running water, supported by photos and video clips, became the video "Handwashing communication in South Africa: A case study in knowing your audience" that was shown at the Access for All conference of October 2020. The video featured during the 2020 local celebration of Global Handwashing Day and was also shared with the South African WHO office. Watch the video here.[5]

Data integrity in the water sector

The second example illustrates the powerful impact of information that is usable because it is clear and relevant. The draft ISO Plain Language Standard captures this in its fourth principle: Readers can easily use the information (usable).[6] (Balmford et al., 2018).

Background

In South Africa, the National Census and the General Household Survey (GHS) are critical instruments for government to generate data on how many people have access to safe and reliable water and sanitation services. The last Census was in 2011; the next one will be in 2022.

This means that the perspective and experiences of citizens are the most important sources for government on the actual state of water and sanitation services in South Africa. Their experiences reflect if the country's progress in terms of the Sustainable Development Goals (SDGs) is on track and whether water and sanitation projects remain operational and well-maintained.

Data integrity is therefore essential. To achieve this, the Census and GHS must ask questions about the indicators of the SDGs and project health in a way that citizens find relevant, easy to understand, and easy to answer appropriately. (This is what ''usable information'' [Principle 4] translates to in this context.)

In 2020, the Water Research Commission commissioned us to:

1. Test in Round 1 if South Africans understand the Census 2011 water and sanitation questions and a selection of the GHS 2020 questions as intended, and can give answers that accurately reflect their water and sanitation realities, and
2. Analyse, revise, and re-test the questions in Rounds 2-4 to maximise understanding and minimise inappropriate answering.

3 https://plain-language.co.za/wp-content/uploads/2021/07/TT-849-21-final-web.pdf

4 Siyasanga Sodwana from the Eastern Cape province as quoted in a City Press article of 1 September 2020, by Alicetine October.

5 https://youtu.be/yxavhStATSM

6 Balmford, C., Cheek, A., Kleimann, S., Harris, L. & Schriver, K. 2018. Plain Language standards: A way forward. *The Clarity Journal*, 79:11-16.

The fieldwork was conducted in October and November 2020, and March 2021. It entailed 102 in-depth qualitative interviews with a diverse group of adults in formal, informal and rural areas in the provinces of Gauteng, Limpopo, and North West. The sample reflected South Africa's language demographics: the majority of respondents do not speak English at home.

Key findings of Round 1

In Round 1, the research found alarming levels of inappropriate answering. For example, only half of respondents could answer the main water question in the Census appropriately as the chart below depicts.

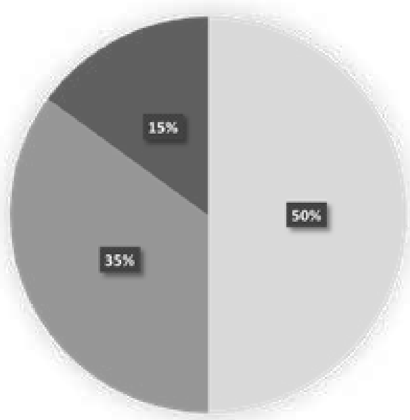
Census 2011 question	Appropriate answering
In which way does this household mainly get piped water for household use? 1 Piped (tap) water inside the dwelling 2 Piped (tap) water inside the yard 3 Piped (tap) water on community stand: distance less than 200m from dwelling 4 Piped (tap) water on community stand: distance between 200m and 500m from dwelling 5 Piped (tap) water on community stand: distance between 500m and 1000m (1km) from dwelling 6 Piped (tap) water on community stand: distance greater than 1000m (1km) from dwelling 7 No access to piped water	

Table 1: Appropriate answering of the main water question in the Census

The legend is as follows:

Appropriate answer	Response is an accurate reflection of respondent's water or sanitation situation
Inappropriate answer	Response is not an accurate reflection of respondent's water or sanitation situation
No comprehension	Respondent was unable to answer the question
Note: The term ''appropriate'' is not relevant for questions that ask perception or opinion. In the research, the term was only applied when the fieldworkers were able to verify the respondent's response either by observation or with probing.	

The equivalent water question in the GHS 2020 questionnaire gave a similar result:

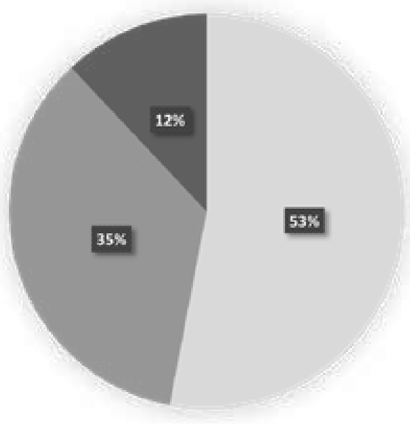
GHS 2020	Appropriate answering
What is the household's main source of drinking water? 1 Piped (tap) water in dwelling/house 2 Piped (tap) water in yard 3 Borehole in yard 4 Rain-water tank in yard 5 Neighbour's tap 6 Public/communal tap 7 Watercarrier/tanker 8 Water vendor (charge involved) 9 Borehole outside yard 10 Flowing water/stream/river 11 Stagnant water/dam/pool 12 Well 13 Spring 14 Other	

Table 2: Appropriate answering of the first water question in the GHS 2020 questionnaire

Inappropriate answering was much higher among respondents in informal and rural areas. These are the people still underserviced with safe water and sanitation in terms of national and international goals and targets. Most of them are poor, they don't understand English well, and they bear the brunt of poor municipal service delivery.

The research found that the questionnaires fail the very people who are the target of improved water and sanitation delivery. These people are disempowered to report on their situation, because the survey questions are difficult to understand and respond to, and they inadequately reflect realities and needs.

As a result, the research findings raised serious questions about the integrity of the data.

Note: The Census and GHS questionnaires are in English only. In this research, only respondents with a basic conversational proficiency in English were interviewed. The actual levels of inappropriate answering are therefore probably higher. The study recommended that the questionnaires be translated in the official South African languages.

Reasons for inappropriate answering

Terminology was a major barrier to appropriate answering in Round 1. Many respondents did not understand key terms like *household, main source, dwelling, or piped water*.

We drew up a list of all the terms that most respondents in informal and rural areas did not understand and rephrased the questions and response options, applying plain language guidelines. To give a few examples:

- Respondents confused *water tanker* with a *water tank*. We replaced *water tanker* with *water truck*. The commonly used term for a water tank is a *Jojo*. We used both in the response option: *water tank (Jojo)*.

7 https://plain-language.co.za/wp-content/uploads/2020/05/4-Bridging-the-gap.pdf

- Respondents knew the word *pipe*, but not *piped*. We had to reason that for consumers who get their drinking water from the local municipality, piped water is the same as tap water, hence we could replace *piped* with *tap*.
- Respondents did not understand the word *interruptions*. They would say ''the tap is dry''. We used the phrase and added *(without water)* to make it acceptable for the full spectrum of consumers.
- *Chemical toilet* is one of the response options in the question about the household's sanitation facility. Municipalities put them up in informal settlements as a temporary measure. Respondents were familiar with the noun, *chemicals*, and since they pour chemicals into their pit toilet or use chemicals to clean toilets, they would inappropriately select this option for pit toilets and even for flush toilets. Respondents suggested *mobile* or *funeral toilet* as alternatives. (When these respondents go to funerals, there are usually chemical toilets.) *Mobile toilet (like the one used at events)* tested well.

Other reasons why respondents answered inappropriately were structural issues and respondent task issues. Below are a few examples:

Structural issues:

- Long and complex questions and response options
- Double negatives
- Use of passive voice

Respondent task issues:

- Too many or too few response options
- Response options that are not mutually exclusive
- Ambiguous response options
- Singular mention when respondent requires multiple mention
- Realities being more complex than the response options cover
- Cognitive frames, for example when respondents usually express distance in lapsed time instead of metres and kilometres
- Recall

Rounds 2, 3 and 4

We used the methodology of Cognitive Action Research[7] in three subsequent rounds to revise the questions and test the revisions. The revisions were made in cooperation with officials from the Department of Water and Sanitation and Stats SA to ensure that the revised questions remained on track in terms of their objectives.

Appropriate answering, and consequently data integrity, improved progressively from round to round. Moreover, the way that respondents engaged with the fieldworkers and the questions changed. The respondents' non-verbal reactions demonstrated that they were much more comfortable with the revised questions:

- They listened intently to the revised questions and response options;
- They answered much quicker; and,
- They were comfortable to keep their distance (important in COVID times!) and did not try to peep at the questionnaire.

Below is an example of how a question evolved from Round 1 to Round 4. The notes below the table explain the changes.

Round 1	Round 2	Round 3	Round 4
How far is the water source from the dwelling or yard? (Note that 200m is equal to the length of two football/soccer fields.) 1. Less than 200 metres 2. 201 -- 500 metres 3. 501 metres -- 1 kilometre 4. More than 1 kilometre 5. Do not know	How long does it usually take you to fetch water? 1. Less than 30 minutes 2. More than 30 minutes 3. It is not my task to fetch water.	Does it take you longer than 30 minutes to fetch your drinking water?	No change.

Table 3: Illustration of how the distance question changed from Round 1 to 4

Notes

1. The Strategic Framework for Water Service stipulates that household water should be accessible within 200 metres of the household to meet the requirements of a basic water supply facility.

2. In the Census 2011 questionnaire, distance is included in the first question which determines access to piped water (See Table 1). In the 2020 GHS questionnaire, distance is a separate question for respondents who fetch water outside their yards (See Table 3, Round 1). Distance is asked in metres and kilometres.

3. Distance in metres and kilometres was a difficult concept for some respondents, because they usually express distance to the communal tap or the municipality's water truck as walking time.

4. For Round 2, we decided to test a time indicator instead of the distance indicator. According to SDG 6.1, a basic service comprises drinking water from an improved source less than 30 minutes away, for a round trip, including queuing. The question tested well. Respondents answered appropriately and considered waiting time and a round trip in their calculation. The question was slightly adjusted for Round 3 to fit the Census question format. This question tested well in Rounds 3 and 4.

Outcome of the study

The outcome of the study was water and sanitation questions that respondents found easy to understand and answer. Using these questions in the Census and GHS will improve the integrity of data that is critical to ensure that all South Africans have access to safe water and sanitation.

Implications for plain language theory and practice

Both examples confirm the vital importance of Principles 1 and 4 of the draft ISO Standard for Plain Language. Without understanding the realities and needs of these target audiences, and testing the draft communication with them, relevant and useful communication would not have been possible.

The second example illustrated how difficult it can be to make communication easy to understand when a target audience only has a basic understanding of the language of the communication, which was English in this case. The structural differences between English and the respondents' home languages made it even more difficult to apply Principle 3 of the draft ISO Standard.[8] We need more research on how to align language structures in English communication to maximise clarity for non-English target audiences.

Lastly, both examples illustrate how important it is for us, as plain language practitioners, to give our target audiences a voice in the design of communication so that they can express their needs and co-create content that is relevant and useful to them.

8 Balmford, C., Cheek, A., Kleimann, S., Harris, L. & Schriver, K. 2018. Plain Language standards: A way forward. The Clarity Journal, 79:11-16.

Comic-style documents and information design

Eliisa Pitkäsalo and Anne Ketola

Illustrations produced by Jan Pitkäsalo

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Introduction

One way of making complex documents more accessible for their users is to turn them into comics. Comic contracts – legally binding employment contracts presented as comics – were developed by attorney Robert de Rooy in South Africa in 2014.[1] In addition to employment contracts, comic-style documents have been used, for instance, in fields of medicine and technical communication. In this article, we present our own work with comics produced for social welfare communication.

We consider the production of comic-style documents as *information design*. In other words, our focus is on the users of the documents. To create a comic-style document that is as accessible as possible to its users, the illustrations and the overall comics' design aim to

- make content *simple*
- make information *meaningful* for a particular user
- help the user *navigate* through a complex document

The design is informed by questions such as: *Who are the users of the document? What do the users need to know and do based on the information they gather from the document?*

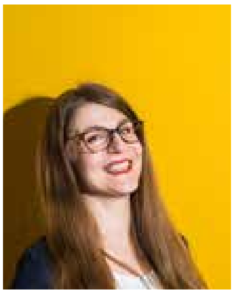
One of the challenges in creating comic-style documents is that images are more *concrete* than text. For instance, one of our examples below discusses illustrating the word *parent.* The word can refer to any gender, any age, and any physical appearance, but the illustrator needs to choose certain characteristics for the parent in the images. In a sense, the illustrations are visual examples of what the text could mean. A lot of decision making is involved in the process. In this article, we present examples of such decision making from one of our own comics projects.

Contract for supervised exchange

Our examples are from a comic-style document that we have created in collaboration with *The Finnish Federation of Mother and Child Homes and Shelters*, which is a child welfare organization that helps children and families in difficult and insecure situations.

The documents we have converted into comics involve their services that support child–parent contact in difficult situations. The first is a contract for a supervised exchange of a child from one parent to another, needed, for instance, in conflicted divorce/separation situations where parents cannot be in the same room at all. The second is a contract for supervised visitations, where a parent and child only meet at a supervised facility, due to, for instance, the substance abuse or mental health

1 See Haapio, Plewe and de Rooy "Next generation deal design: Comics and visual platforms for contracting" in *Networks. Proceedings of the 19th International Legal Informatics Symposiom IRIS 2016*).



PhD Anne Ketola is a communication researcher and a member of the Sarjis research group at Tampere University. She has published extensively about how people interpret the combination of words and images in illustrated texts.

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issues of the parent. The contracts are signed by the parents and a supervisor who represents the federation. In this article, we present examples selected from the supervised exchange contract. It includes the instructions of the exchange and the rules of the exchange facility. These details outline how the exchange happens, what is allowed and what is not at the exchange facility and what should be done, if, for example, one of the parties is late for the exchange. The contract also contains some references to the law and other legal documents, for instance, a court decision.

Transforming contract text into comics

A comic contract typically includes both images and text in plain language. Images and other visuals such as flow charts are great for depicting actions and processes, but some details need to be expressed in writing for the comic to be unambiguous and legally valid.

Creating the comic starts with deciding the most important turning points, moments, and actions that will be depicted in the comic panels. We recommend having both content experts and the visual artist involved in deciding the contents and overall style of the comic.

Characters

One of the first decisions that needs to be made when creating the comic is how to depict the characters. There are some important aspects to discuss when deciding on how the characters look like:

- Are the characters human?
- Are they realistic or artistic and stylized?
- What are their physical characteristics?
- How old are they?
- How is gender presented?

These questions may also stimulate debate because the characters need to stand for a diverse readership. The following are examples of the characters we created for the example comic. These characters appear throughout the comic contract in different scenarios. These scenarios represent the rules of the exchange service as well as the consequences of the parents' problematic behavior.

The separated parents who sign the contract are represented in the comic as a female and a male character (the mother is the blond-haired person in the second image and the father is the dark-haired person in the first image and the drunken dark-haired person). This heteronormative family structure does not represent all families, of course, but it represents most of the clients who need the support services of our project partner. We aimed to depict the child and the exchange supervisor (the dark-haired person in the second image and the person protecting the child in the third image) in a gender-neutral manner.

Creating a story

The contents of the document are often transformed into a story or a *narrative* when creating a comic-style document (for instance, a certain character carries out different steps of a process in a particular order). In addition to rewriting the document text into plain language, creating the narrative may require adding text that isn't a part of the original document. An example of such text is the character's speech, typically presented in speech bubbles. This text helps the reader understand the story – and hence the document contents – better.

The following is an example from the beginning of our comic contract. The contract text has been rewritten into a story where the father arrives at the exchange facility for the first time to get to know the place. The story then goes on to present how the exchange of the child takes place in practice.

In these four panels, the father arrives at the exchange facility. He is welcomed by the exchange supervisor in the third panel. In the fourth panel, the supervisor offers him coffee and tea, and the father asks for coffee.

Visual examples

The illustration of the contract contents requires a lot of decision making. All activities, no matter how simple, can be visually represented in countless different ways. The following panel is the illustration of a part of the contract that states that both parents and the children visit and get to know the exchange facility before starting the service.

This information could have been illustrated in various ways, depicting either one of the parents and/or the child, doing different things (entering the facility, leaving the facility, doing a range of different things at the facility). Our decision was to include the supervisor and the child sitting on the floor, looking at a book, and having a good time. Our aim was to depict a cosy, friendly atmosphere. Our partners at the federation felt that this could ease some of the prejudices and fears their clients often have before starting the service.

In a way, the image is an *example* of what the sentence can mean. It is one of the possible activities that sentence can refer to. Visual examples are also needed for illustrating ideas that are more abstract. The following image is the illustration for a part of the contract that discusses unforeseen and acute reasons that might suddenly cause the cancellation of the exchange.

The image shows the child lying in bed with a thermometer in his or her mouth. It is only one the possible situations that might lead to the exchange being cancelled, but it serves as an example.

Symbols

Abstract ideas and concepts can sometimes be illustrated with visual symbols – small images that become established to mean certain things. A judge's gavel is an example of a symbol. In our comic contract it is used as an illustration in part that discusses a court decision and articles of law.

The names of the exact clauses of law, naturally, need to be included in writing for the contract to be unambiguous. Yet using the gavel as a visual symbol can help the reader orient the reader: it suggests that this part of the contract discusses something that is related to law. This can be particularly helpful for readers who are not fluent in the language of the document (Finnish, in our case).

Conclusion

A lot of decision making goes into creating comic-style documents. There seldom is only one, "correct" way of creating an illustration. The process of creating the illustrations needs to start and end with the consideration of the target audience: why are they reading the document, and what do they need it for? Simplicity and comprehensibility are more important than artistic intent.

All in all, comic contracts and other comic-style documents hold great potential as a form of plain language. The medium is particularly useful for illiterate or low-literate readers, or readers who are not fluent in the language of the particular document.

The comic contract introduced in the article can also benefit the children who use the supervised exchange service: the comic shows the child what will and what will not happen at the facility and assures the child that they will be taken care of the whole time.

Sarjakuva-asiakirjat ja informaatiomuotoilu

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(FT, dos.) on monikielisen viestinnän ja käännöstieteen yliopistonlehtori Tampereen yliopistossa. Tällä hetkellä hän tutkii multimodaalisten tekstien kääntämistä ja sanan ja kuvan vuorovaikutusta sarjakuvissa. Yhdessä toisten tutkijoiden kanssa hän on perustanut monitieteisen Sarjis-tutkimusryhmän, joka tarkastelee sarjakuvamuotoisen viestinnän mahdollisuuksia. Hän johtaa Suomen Akatemian rahoittamaa Oikeutta sarjakuvan keinoin -tutkimushanketta. Hankkeessa tutkitaan, kuinka erilaisia virallisia asiakirjoja voi kääntää sarjakuvaksi.

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Eliisa Pitkäsalo and Anne Ketola

Kuvat: Jan Pitkäsalo

Johdanto

Viranomaistekstit ovat usein kieleltään monimutkaisia ja siksi hankalia ymmärtää. Yksi tapa tehdä virallisesta asiakirjasta ymmärrettävämpi on kääntää se sarjakuvaksi. Näin toimittiin Etelä-Afrikassa jo vuonna 2016, kun juristi Robert de Rooyn kehittämä sarjakuvasopimus eli juridisesti pätevä sarjakuvamuotoinen työsopimus otettiin käyttöön eräällä hedelmäplantaasilla. Työsopimusten lisäksi sarjakuvamuotoisia asiakirjoja on käytetty myös esimerkiksi lääketieteen alalla ja teknisessä viestinnässä. Tässä artikkelissa esittelemme tutkimushankettamme, jonka aikana käännämme sosiaalihuollon asiakirjoja sarjakuvan muotoon.

Sarjakuvamuotoisten tekstien laatiminen on eräänlaista informaatiomuotoilua, jossa keskiössä ovat asiakirjojen käyttäjät. Mahdollisimman saavutettavan asiakirjan laatimisessa kuvituksella ja sarjakuvan muotoilulla ylipäätään pyritään siihen, että

- asiakirjan sisältö esitetään yksinkertaisesti
- asiakirjan sisältö esitetään lukijalle mielekkäästä näkökulmasta
- löytää asiakirjasta tarvitsemansa informaation helposti

Asiakirjan muotoilua ohjaavat kohderyhmää koskevat kysymykset: Keitä asiakirjan käyttäjät ovat? Mitä käyttäjän tulee tietää tai tehdä sen informaation perusteella, jota asiakirja tarjoaa?

Sarjakuvamuotoisen asiakirjan kuvittajaa haastaa se, että kuvallinen ilmaisu on sanallista konkreettisempaa. Esimerkiksi sanalla *vanhempi* voidaan viitata monenlaisiin ihmisiin, mutta kuvittajan on tehtävä valintoja ja päätettävä, miltä kuvassa esitetty hahmo näyttää, esimerkiksi minkä ikäinen hän on ja mitä sukupuolta hän edustaa. Kuva on eräänlainen visuaalinen esimerkki siitä, miltä tekstimuotoisessa asiakirjassa mainittu vanhempi voisi näyttää. Sarjakuvan laatimisprosessin aikana tehdään siis hyvin paljon erilaisia valintoja. Tässä artikkelissa kerromme muutamista valinnoista, joita olemme tehneet yhdessä sarjakuvahankkeistamme.

Valvotun vaihdon säännöt

Esimerkkimme ovat sarjakuva-asiakirjasta, jonka olemme laatineet yhteistyössä Ensi- ja turvakotien liiton kanssa. Ensi- ja turvakotien liitto on järjestö, joka auttaa lapsia ja perheitä vaikeissa ja turvattomuutta aiheuttavissa tilanteissa.

Asiakirjat, jotka olemme kääntäneet sarjakuvaksi, tukevat lapsen ja vanhemman yhteydenpitoa silloin, kun ympäröivät olosuhteet ovat hankalat. *Valvotun vaihdon säännöt* on sopimus, joka on luotu sellaisia tilanteita varten, joissa lapsi viettää toisen vanhempansa luona esimerkiksi viikonlopun, mutta vanhemmat eivät voi esimerkiksi riitaisan eron vuoksi tavata toisiaan. Tällöin lapsen siirtämiseen vanhemmalta toiselle tarvitaan turvallinen, kolmannen osapuolen valvoma paikka. Valvotun tapaamisen säännöt puolestaan on sopimus, jota käytetään, jos vanhempi ja lapsi voivat tavata vain valvotusti esimerkiksi vanhemman psyykkisen sairauden tai huumaavien aineiden väärinkäytön vuoksi.

Tämän artikkelin esimerkit ovat valvotun vaihdon sopimuksesta, jossa kerrotaan yksityiskohtaisesti, miten vaihto tapahtuu, mikä on sallittua ja kiellettyä vaihtopaikassa ja miten pitää toimia, jos esimerkiksi toinen osapuolista myöhästyy sovitusta aikataulusta. Sopimuksessa on myös viittauksia lakeihin ja muihin oikeudellisiin asiakirjoihin, esimerkiksi tuomioistuimen päätökseen.

Sopimustekstistä sarjakuvaksi

Sarjakuvasopimus sisältää tyypillisesti kuvia ja selkeällä kielellä kirjoitettua tekstiä. Kuvat ja muut visuaaliset sisällöt auttavat prosessien kuvaamisessa, mutta osa yksityiskohdista on ilmaistava verbaalisesti, jotta sarjakuva olisi yksiselitteinen ja juridisesti pätevä.

Kun tekstimuotoinen asiakirja muutetaan sarjakuvaksi, tekijöiden täytyy päättää, mitkä ovat tärkeimmät käännekohdat ja muut yksityiskohdat, jotka sarjakuvan ruuduissa kuvataan. On tärkeää, että sarjakuva-asiakirjojen laatimiseen osallistuu sekä sisältöasiantuntijoita että sarjakuvataiteilija.

Henkilöhahmot

Sarjakuva-asiakirjan laatijoiden ensimmäiset päätökset koskevat henkilöhahmoja. Silloin on keskusteltava ainakin seuraavista kysymyksistä:

- Ovatko henkilöhahmot ihmisiä? Ovatko he realistisia vai tyyliteltyjä?
- Mitkä ovat heidän fyysiset ominaisuutensa?
- Kuinka vanhoja he ovat?
- Miten sukupuoli esitetään?

Nämä kysymykset voivat herättää kiivastakin keskustelua, koska henkilöhahmojen täytyy edustaa erilaisia lukijoita. Seuraavissa esimerkeissä esittelemme henkilöhahmot, jotka loimme sarjakuva-asiakirjaamme varten. Henkilöhahmot esiintyvät asiakirjassa eri yhteyksissä, esimerkiksi ruuduissa, joissa esitellään vaihtoa koskevia sääntöjä ja toimenpiteitä, joita vanhempien ongelmakäyttäytymisestä seuraa.

Asiakirjassa eronneet vanhemmat on kuvattu nais- ja miespuolisena henkilöhahmona. Kuvasarjan toisessa ruudussa esiintyvä vaaleatukkainen nainen kuvaa lapsen äitiä, ja kuvasarjan ensimmäisessä ruudussa sohvalla istuva tummatukkainen mies ja kolmannen ruudun humalainen mies kuvaa isää. Tämä heteronormatiivinen perhemalli ei luonnollisestikaan edusta kaikkia perheitä, mutta se edustaa suurinta

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osaa asiakkaista, jotka tarvitsevat hankkeemme yhteistyökumppanin tarjoaman palvelun tukea. Päätimme tehdä sekä lapsesta että ohjaajasta (kuvasarjan toisessa ruudussa oleva tummahiuksinen hahmo ja kolmannessa ruudussa lasta suojeleva hahmo) ulkonäöltään mahdollisimman sukupuolineutraalit.

Tarinan luominen

Sarjakuvamuotoisessa asiakirjassa sisältö esitetään usein tarinan muodossa eli kertomuksena. Kertomus syntyy esimerkiksi siten, että joku henkilöhahmoista suorittaa tietyt toiminnalliset vaiheet tietyssä järjestyksessä. Kerronnan sujuvoittamiseksi ruutuihin voi olla tarpeen lisätä myös sellaista tekstiä, jota ei ole alkuperäisessä asiakirjassa. Tästä esimerkkinä on puhekupliin lisätty puhe, joka auttaa lukijaa ymmärtämään paremmin kertomuksen – ja samalla myös asiakirjan sisällön.

Seuraava esimerkki on sarjakuvasopimuksemme alusta. Sopimustekstiin on lisätty ruutuja, joiden avulla lukija otetaan mukaan kertomukseen.

Näissä neljässä ruudussa kerrotaan, mitä tapahtuu useimmiten, kun vanhempi saapuu tutustumiskäynnille. Ruuduissa ohjaaja toivottaa vaihtopaikkaan saapuvan isän tervetulleeksi, tarjoaa hänelle kahvia tai teetä ja ohjaa hänet istuutumaan pöydän ääreen. Esimerkkikuvasarjan jälkeen tulevissa ruuduissa ohjaaja kertoo, miten vaihto käytännössä tapahtuu.

Visuaaliset esimerkit

Asiakirjan sisällön kuvittaminen vaatii paljon erilaisia päätöksiä, koska kaikki yksinkertainenkin toiminta on mahdollista kuvittaa lukemattomin tavoin. Seuraava esimerkki on kohdasta, jossa kerrotaan, että sekä vanhemmat että lapset käyvät tutustumassa etukäteen tiloihin, joissa vaihto tapahtuu.

Asiakirjassa esitetyn tiedon tutustumiskäynnistä voisi kuvittaa monin eri tavoin kuvaamalla joko lasta tai toista vanhemmista esimerkiksi saapumassa vaihtopaikkaan, lähtemässä sieltä tai tekemässä siellä erilaisia asioita. Päätimme kuvata tilannetta, jossa ohjaaja ja lapsi istuvat lattialla, katsovat kirjaa ja ilmiselvästi nauttivat tilanteesta. Kuvan avulla pyrimme välittämään lukijalle tunteen vaihtopaikan kodikkaasta ja ystävällisestä ilmapiiristä. Valitsimme kuvitettavaksi ruudussa esitetyn kirjanlukuhetken, koska yhteistyökumppanimme mukaan kodikas kuva voi vähentää ennakkoluuloja ja pelkoa, joita asiakkaat usein tuntevat palvelua kohtaan.

Kuva on siis esimerkki siitä, mitä kirjoitetussa sopimuksessa oleva lause voi merkitä ja millaiseen toimintaan se voi viitata. Kuvallisia esimerkkejä tarvitaan myös abstraktimpien asioiden kuvaamiseen. Seuraava ruutu kuvaa sopimuksen kohtaa, jossa kerrotaan, mitä odottamatonta eri osapuolille voi tapahtua ja mitä niistä seuraa.

Kuvassa on lapsi, joka makaa sängyssä kuumemittari suussaan. Kuvassa esitetty tilanne on vain yksi mahdollinen esimerkki odottamattomista tilanteista, mutta se edustaa esimerkkinä myös muita vastaavia tilanteita, jotka voivat johtaa vaihdon peruuntumiseen.

Symbolit

Joskus abstrakteja käsitteitä voi olla helpompi kuvata käyttämällä yksittäisiä symboleja. Esimerkiksi tuomarin nuijaa käytetään sarjakuvassamme kuvaamaan tuomioistuimen päätöstä.

Lakien ja klausuulien sisältö täytyy lisätä sarjakuva-asiakirjaan myös kirjoitetussa muodossa, jotta asiakirja olisi mahdollisimman yksiselitteinen. Symbolit kuitenkin auttavat lukijaa ymmärtämään, minkä tyyppisistä asioista kulloinkin on kyse. Esimerkiksi nuija symbolina kertoo, että kyseisessä asiakirjan kohdassa käsitellään lakiin liittyviä asioita. Symbolien käyttö voi auttaa erityisesti kielitaitonsa vuoksi heikommassa asemassa olevia lukijoita.

Lopuksi

Sarjakuva-asiakirjojen laatiminen vaatii paljon päätöksentekoa, koska kuvien tekemiseen ei ole olemassa yhtä oikeaa tapaa. Sarjakuvan laatiminen pitää aloittaa ja myös päättää miettimällä, mikä on sarjakuvamuotoisen asiakirjan kohderyhmä, miksi lukijat lukevat asiakirjaa ja mihin tarkoitukseen he sitä tarvitsevat. Sopimustekstin yksinkertaisuus ja ymmärrettävyys ajavat taiteellisten pyrkimysten ohi.

Sarjakuvasopimuksia ja muita sarjakuvamuotoisia asiakirjoja voidaan pitää yhtenä selkeän kielen muotona. Sarjakuva on erityisen hyödyllinen väline sellaisille lukijoille, joiden lukutaito on heikko tai jotka ovat lukutaidottomia, sekä lukijoille, jotka osaavat heikosti kieltä, jolla asiakirja on kirjoitettu.

Sosiaalihuollon tarpeisiin luodut sarjakuvamuotoiset asiakirjat voivat hyödyttää myös lapsia, jotka käyttävät valvotun vaihdon palvelua. Sarjakuva näyttää lapselle, mitä tapaamispaikassa tapahtuu ja mitä siellä ei tapahdu, ja pyrkii vakuuttamaan lapsen siitä, että hänestä pidetään hyvää huolta koko vaihtoprosessin ajan.

Turning a document into a comic: 4 steps

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Simple comics are an efficient way of communicating content for readers who have difficulties with written text. Images make content easier to understand for readers who struggle with a particular language or with reading in general. Comics are easy to browse and digest at a glance. In addition, comics can make content more attractive for readers: If we present something as a comic, our readers are simply more likely to read it in detail. Comics therefore also benefit readers who do not have linguistic or cognitive challenges.

This article presents basic instructions for converting a text-only document into a comic. These instructions have been adapted from the Five Steps to Plain Language[1] that are published on the website of the Center for Plain Language. The information design process of making a plain language document and making a "plain comic" are surprisingly similar.

The process of making the comic has four stages:

Step 1: Identify and describe your target audience

Step 2: Structure the content of your document

Step 3: Create the illustrations by using simple visual techniques

Step 4: Test your design and content

These instructions focus on the visual solutions of the comic, but, needless to say, the text included in the comic needs to be accessible as well (language that is clear and concise, free of unnecessary jargon).

For a hands-on example of using these instructions, see the author's video of making a comic out of fire safety instructions.[2]

Step 1: Identify and describe the target audience

Who will be reading your document, and what do they use the document for? What do they need to do, know, and learn based on your document? List audience characteristics that might influence design (for example age, cultural and linguistic background, if relevant). For instance, if you know that children will be using the document, consider employing visual solutions that appeal for this audience.

The linguistic and cultural background of your readers may affect both the verbal and visual aspects of your comic. If (some of) your readers are not fluent in the language of the document, pay even more attention to the comprehensibility of the text.

Your readers' linguistic background may also affect their default reading direction. People whose native language reads left to right tend to intuitively start reading a comic page at the upper left corner of the page, and people whose native language reads right to left then to start at the upper right.

1 https://centerforplainlanguage.org/learning-training/five-steps-plain-language/

2 https://cutt.ly/aRyr9A

Colors and symbols may also carry different meanings for readers from different cultural backgrounds. For instance, the typical symbol for a hospital is a red cross in some cultures, in others, it is a crescent moon and a star.

Step 2: Structure the content

The contents of the document need to be restructured and at least partly rewritten before the illustration can start.

- **Choose relevant content.** Does everything in the document have to be included in the comic? Are there parts in the document that can be shortened for the comic? Are there sentences that could be combined? Are there parts in the document that cannot be transformed into images--that need to be presented as text-only (*e.g.*, references to legal materials, such as statutes, court decisions and legislative materials)?

- **Segment text into panel-sized bits.** This is the point where you can start thinking about your content in terms of images. Plan how many panels you will need for depicting your content. Some sentences can be expressed with one image (one panel). Sometimes several sentences can be combined into one image. Sometimes several images are needed to convey one single sentence (for instance, sentences that express different temporal stages, *e.g.*, "You can work full time until *your work application is decided").* You can also plan how much space you want to dedicate for a certain theme (*e.g.*, a certain part of the document), and then estimate how many panels you can fit into that space.

- **Start editing your text.** The text that is included in the comic should ideally follow the principles of plain language. In addition to making the text more comprehensible, it should also be significantly shortened. Start shortening the text before the illustration starts, and be prepared to shorten it even more when the images are ready and it is time to the add the text.

Re-structure your content by considering and weighing the following:

- **Chronological order:** In which order do things happen? What needs to be shown to the reader first for the comic to make sense?

- **Thematic order:** Which parts of the document describe or are related to the same events or processes? Group related information and separate the unrelated.

- **Order of importance:** What is the most essential thing the reader needs to know and remember? Emphasize essential content either by presenting it in the beginning of your comic or the top of a comic page (or by making it larger, as discussed below).

Analyze your document from all three perspectives and consider if or how they are relevant for your comic. Which solutions would make sense for your comic? For instance, is there a bit of information that is so important for the reader to grasp that it should be presented in the very beginning, even if mentioning it later would make more sense for the chronological order of things?

Step 3: Create the illustrations by using simple visual techniques

Once you have an idea of the structure of your comic and a rough idea of what type of panels you want to include, the illustration can start. Ideally, this part of the process involves close cooperation between content experts (people who know the subject matter of the document) and the visual artist/illustrator.

The artistic solutions of the illustrator should aim for clarity and simplicity. At the same time, the comic should look visually appealing enough to draw the reader's attention and motivate reading.

Practical illustration solutions can involve considering the following:

- **Planning a grid:** Consider your page design in terms of a grid (invisible vertical and horizontal lines that show where content will go). Adhering to your basic grid (a clear alignment of comic panels, and so on) gives your content a sense of order. It also offers your reader a clear reading path through the material. On the other hand, deviating from your basic grid (*e.g.*, making one of the panels significantly larger, or placing a round panels between rectangular ones) can be used for emphasis.

- **Navigational clues:** Use the amount of space between panels and other visual elements to reflect the relationship between the elements, where possible or relevant. Group panels that belong together and separate panels that are not meant to be read together. Consider using lines and arrows to signal the correct reading path if your design requires it.

- **Characters:** Consider what type of characters might work for your readers. The characters can be human or non-human, simple or detailed. Generally speaking, it may be easier for your readers to identify with characters that look human. Yet sometimes non-human characters can be used to create a subtle layer of humor. An example of this is a comic employment contract made by Australian engineering and design company Aurecon, where the main character was a talking lightbulb. The company described the solution as being "playful with serious attempt".

- **Hierarchy of information:** The most important information should look the most important. Emphasize essential content through:

    - **Layout:** Place important items at the top of the page (the center of the page sometimes works for visual focus, too).

    - **Relative size:** Make important items larger than less-important ones.

    - **Color:** Use bright(er) color to signal importance and to make important items visually "louder". Warm, bright colors typically work well for emphasis.

- **Color:** In addition to using color to signal importance, color can be used to connect related items throughout the comic (show your reader that some items are thematically connected). On a similar note: It is important to use colors consistently, so that readers do not interpret thematic similarities and differences where they are not intended.

  Use symbolic colors where relevant (green and red for right and wrong, etc.). However, try not to build a message on color alone, since it might be inaccessible, for instance, for a color-blind reader.

- **Contrast:** Remember to use sufficient contrast in your content, especially colors. Make sure essential content stands out. A quiet, solid background usually works best.

Step 4: Test the design and content

The final, most important step in making the comic is to test it with readers. If content experts have not been included in the design process, consult their opinions on the illustrations. Do things look like they are supposed to look like? Is essential content emphasized enough?

Target user groups offer the most valuable feedback on whether the comic is comprehensible. The Five Steps to Plain Language instructions offer excellent test questions for this purpose. You can, for instance, ask your readers to describe key concepts or processes in their own words, taking notes on the parts where they stumble or that they appear to have misunderstood, and then rethink your solutions in those parts.

Making communication count: Communication only counts if it leads to good decisions and actions

Matla Titi and Shelley van der Westhuizen
with Irene Stotko

Introduction

As the largest private pension fund administrator and multi-manager in Africa, we engage with over a million employed individuals a year. These individuals are diverse in many ways, including in language, understanding of financial concepts, socio-economic background, and access to technology.

The young average age of our population – more than 10 years younger than the population of the Western world – means retirement seems far away for most. Our topics are complex, and the traditional way of talking about them is jargon-filled. In this article, we show examples of how we made our communications relevant, understandable, and persuasive, and the difference it is making.

Current reality – A communication gap

To many people, finances are mystifying at best and, at worst, exclusive. In the financial services industry, we have a long history of jargon-filled communication. Jargon serves the purpose of communicating effectively among industry professionals. It's a kind of shorthand that enables professionals to use labels for concepts that they have a shared understanding of, usually because of years of formal study. The result is that our peers in the profession may understand us well and find our grasp of the subject fascinating or aspirational, but the customers we serve are left baffled and confused about what we've said.

We found a cartoon of a financial services practitioner who journeys to a rural area and asks if the "folk around here" have special words for net asset value, arbitrage, and general equity fund. This was an amusing but simultaneously sobering reminder of how our customers might experience our communication.

"I'M DOING A SURVEY OF REGIONAL SPEECH AND I WAS WONDERING IF THE FOLKS AROUND HERE HAVE SOME SPECIAL WORDS FOR NET-ASSET VALUE, ARBITRAGE AND GENERAL EQUITY FUND."

Matla Titi

May your choices reflect your hopes, not your fears.
~Nelson Mandela

The focus of Matla's work has been to inform, empower and positively influence retirement fund members to help them make better choices. Matla knows she's succeeded when members experience better financial outcomes as a result of improved financial capability and confidence, and the knowledge to access the right support when it's needed.

Most of Matla's time away from work is spent with her two primary-school-aged children and extended family. She enjoys traveling and exploring, especially on road trips. Matla is currently studying towards a customer experience certification and has relied on her BA, JD, and financial markets and instruments qualifications for the work that she does.

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Shelley van der Westhuizen
Having financial confidence doesn't necessarily mean immediately having more, but it does mean doing more with what you have which leads to a better chance of living the life you want.
The focus of Shelley's work is using data and research insights to find new ways to support people when they're making decisions that affect their money. Being successful at this would mean that people have a better chance of having the life they want. Shelley is working on achieving this one interaction at a time.

Shelley loves spending her leisure time outdoors running and hiking. Living in a beautiful mountainous place near the sea makes this possible. Her work demands quite a bit of attention so being close to the places she enjoys in her time off is important. Her professional qualifications that enable her work now include finance, accounting and risk management. Her psychology degree helps her apply knowledge and experience in a more understanding way.

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What we realised is that over the years there's been a big gap between what we think we've communicated and what is received and understood. They say that acknowledging the problem is the first step. Since then, we've spent the last two years working towards bridging this communication gap.

In this article, we'd like to share some of our journey with you in the hope that what we've learned may support your efforts to communicate effectively.

South African perspective

The South African context provides a set of challenges that might seem familiar to readers with diverse audiences. South Africa is a multi-lingual country with high literacy levels. Adult literacy was 88% in 2019 for South Africans above the age of 20 according to the department of higher education and training (General Household Survey from Statistics South Africa).[1] We believe the total is higher – firstly because it increases by 0.7% on average per year and secondly because literacy in people below the age of 20 will be higher. So our existing literacy level is a good start. However, financial services companies usually communicate in English. Although most South Africans speak English, written English is more challenging because it's not the home language of most South Africans. This presents a barrier to effective written communication, especially, and highlights the importance of good translations for effective communication.

Widely differing socio-economic backgrounds resulting from high levels of inequality present another challenge: customers have differing levels of financial literacy. Financial exclusion is also a feature of this inequality.

To increase financial inclusion and to manage these challenges, it is important to use plain language instead of jargon to communicate and provide useful and simple explanations. Taking these steps will make it more likely that our customers will understand us and will improve access to financial services for all.

Consequences of the communication gap

In our experience and according to our data, many people make uninformed decisions at important moments in their employment journey and in their day-to-day lives. As a result, they and their households experience poor financial outcomes because they don't understand their options, don't have financial confidence, and don't receive the support they need when making decisions.

Why it's important for us to close the communication gap

We succeed as a business when our customers make good decisions that lead them to save more and be better off in retirement. Therefore, the best interests of our customers are naturally aligned to ours.

Communicating effectively is a vital part of ensuring that customers achieve better outcomes. It helps people select the right solutions for their circumstances at the right times – when they need them. The role of communication is to make sure that:

- people are informed before they make choices
- they understand their options, and
- they know when they need help making a choice and where to get it.

1 statssa.gov.za/publications/P0318/P03182019.pdf

In a nutshell, we aim to make financial services accessible to and inclusive of more people and ultimately to have a meaningfully positive impact in their lives.

Moving Forward: A Better Approach

Researching what our customers are going through

The first process we improved was our customer research by conducting extensive ethnographic research. We realised that we had a limited understanding of customer experiences and their needs. Our aim was to discover what people were going through when we shared certain information with them and when they faced choices relating to their finances and lives.

Understanding what people are going through means we can show empathy and be relevant to them. This gives us a better chance of establishing a connection. Having a connection is something we believe leads to more trust and improves our ability to support people when they're making decisions.

Identifying stories and characters

We used our improved understanding of our customers to identify common feelings, challenges, and needs that run through key decision moments. This understanding allows us to connect with people by putting ourselves in their shoes when we design and develop communication. We develop characters that embody the challenges and experiences people are having at important moments of decision. Telling stories through characters helps us connect with our customers and share important messages.

Ethnographic research provided us with powerful insights when we combined it with our own data and other research. We realised that achieving our aims depended on communicating more effectively, and we set about making improvements based on our research findings. We used our insights to design digital experiences and other communication, like videos.

Testing our research interpretation with customers

The second process improvement we made to support our communication objectives was to implement user testing.

We realised that conducting user testing is an essential check to see that we interpret our research insights correctly. One of the interesting studies we carried out was to test our video storyboards to see which parts of the storyboard contributed to the overall message, which parts had the most impact, and which were recalled later, so that customers could apply what they'd learnt to their financial decisions. We also tested whether a diverse group of customers understood each part of the story.

Based on a three-colour coding system, only 20% of our first storyboard received a green light. However, it was clear that our message could be communicated more succinctly and still be effective. Our eventual video was a third of the length of the original storyboard and could be released with confidence that it would have the intended effect.

Effective Communication: Plain Language and Beyond

Our research told us that effective communication has three primary attributes: it is understandable, relevant and relatable, and persuasive and actionable.

Understandable Communication

To help make communication more understandable, we combined plain language expertise with in-depth knowledge of financial concepts, products, and illustrations.

Our starting point was to provide explanations of basic financial concepts that were needed to understand our overall message rather than assume our customers would understand the basics.

We produced several videos for customers to watch at important moments in their employment journeys. These important moments, like starting a new job, involve decisions that have a significant impact on their financial future. These videos brought to life our belief that we can explain financial products and customers' options in plain language that people understand, supported by helpful illustrations.

Relevant and Relatable Communication

Overall, we learned that communication must relate to real people and their situations. To do this:

- ***Take circumstances into account.*** Communication needs to be relevant and relatable to support decision-making. Many people in South Africa have financial challenges. This means that our communication needs to be *relatable* to people who find themselves in challenging circumstances.
- ***Link to life events and be presented at the right time.*** Effective communication must be linked to life events and presented at the time those events are taking place to be relevant and increase its chance of making an impact.

- ***Use representative characters.*** Our research tells us what matters to people at specific decision moments in their lives. For example, a person starting a new job may be thinking about making improvements in their lives like getting fitter, living a healthier lifestyle, or saving for a goal. We used these insights to show empathy with people who are making important decisions about their finances by showing our characters grappling with these same challenges.

For example, the COVID-19 pandemic has resulted in retrenchments that have affected almost a third of South African households. We've done extensive research into the range of feelings people experience when losing their job. Our communication connects with people in their time of uncertainty and struggle so that they regain a sense of control.

However, when people start a new job, they often re-think several things in their lives such as their health and fitness, financial goals, and the service providers they use. When we communicate, we recognise and offer information that supports these other important matters. In videos, we show characters trying to balance their competing needs and making decisions that move them forward.

Generic communication to many people must be relatable to the average person rather than a small group of wealthy people, for example. This means using an income level that an average person can relate to or a job level that's typical. We also adapt salary levels to the membership profile of our corporate clients in custom brochures. However, this approach comes with limitations in the sense that it cannot connect with the unique circumstances people have. Making the most of opportunities to engage in a personalised, non-intrusive way is the best way to connect meaningfully, supported by relevant and relatable generic communication.

Persuasive and actionable communication

Communication must be *persuasive* enough to encourage people to make trade-offs and sacrifices for their future selves. To improve their financial outcomes, we must persuade people that they need to act and provide the information to help them take informed action. There are several techniques we use:

- ***Make the future real now and address false beliefs.*** A technique we use is to make the future feel more real in the present. We help customers overcome some of their incorrect assumptions that lead to inaction or acting when it's too late. For example, people don't think they'll live long after they retire and so they don't think it's important to save for retirement. We ask them to think of their oldest grandparent and explain that they're very likely to live longer than the grandparent they think of. We have found that this approach helps people form a more realistic view of how long they are likely to live after retiring and how long their retirement savings will need to last.
- ***Encourage an emotional response.*** Using illustrations that people can relate to and that have the power to draw out an emotional response is another way of increasing the persuasiveness of messages. For example, we use a healthy money tree that grows while it's being watered to show the value of keeping retirement savings invested when changing jobs. The alternative picture of a bare twig sends a message of what happens when you must start all over again because of poor decisions.

2 https://retirements.digital.alexanderforbes.co.za/introduction/1

Videos provide the opportunity to go on a journey with characters – showing what their different futures may be like because of choices they make. Characters meet their older selves with full grocery carts or an almost empty basket containing only a few essentials. These examples show how different approaches people follow during their working lives affect them in retirement.

They also encourage people to save more during their working lives and keep their savings invested instead of withdrawing them in cash (as South African legislation allows) when they change jobs.

The next level of persuasiveness is *personalisation and interaction* – so that people can visualise how options and decisions affect them based on their personal circumstances. We have built a personalised, guided, and practical online tool called *My Retirement Picture* for people to explore their options, think about their household budgets and imagine and prepare for their futures.

Communication as Part of a Broader System

Communication plays a part in helping people make decisions that are right for them

Good communication plays a vital role in solving the challenge of supporting people to make better decisions. Plain language plays an important role in communicating effectively.

The brochures, videos, and interactive digital experiences we've developed are part of a broader system of communication that is, in turn, a part of the total experience our customers have of us. These communication initiatives aim to make information and decision-support more accessible to more people by being easy to understand and relatable. More accessible communication also relies on expanding the range of communication mediums and how these can be accessed, considering the limited access to technology and data that many people struggle with.

Effective one-way communication is one of the methods we use to support people as they make decisions at milestones during their working lives and decisions in their day-to-day lives. Truly making communication count means going beyond one-way communication to interactive, personal, and guided digital experiences. One of these experiences, *My Retirement Picture*, can be found using an Internet search.[2] This interactive tool helps people to explore and imagine their futures–motivating them to start preparing sooner and be more likely to take their future selves into account when making financial decisions.

Human interaction is also a critical part of effective communication that improves financial outcomes. Conversations help people understand information and make decisions based on their personal circumstances.

Measuring Impacts and the Future

Having a positive impact

Lastly, we'd like to share the impact of what we're doing–acknowledging that we're in the early days of measuring the impact of our efforts to make communication count.

What we can share is that 10 times more customers have engaged with us in one-on-one conversations during 2020 than in the previous year, despite COVID-19.

Because of our communication efforts, 80% of people starting new jobs who are offered counselling are opting to receive support by telephone or video conference. The beauty of telephone contact is that it is safe, most people have access to it, and we can have a conversation in each person's language of choice.

Also, over 10 000 of our retirement fund customers showed interest in our video about people leaving their jobs by clicking on the link to view it the first time we shared it.

Since November 2020, we've released *My Retirement Picture* to audiences attending our pre-retirement webinars. Most people interacted with this personalised journey that helps them prepare to retire and begin their retirement planning.

In terms of plain language in written communication, we reduced the number of attachments we send with our guide for new customers from 11 to 2. Much of the most important information they need to know is more than 70% shorter than it was before.

Next stages of the journey to make communication count

Although we have objectives driving our efforts that relate to better retirement outcomes, and keep growing our skills and experience to help us achieve them, we're still learning what works best. Our goal is to move forward by listening to our customers, working out what helps them grow their financial confidence, measuring the impact of what we do, reflecting on this information, and responding appropriately.

This journey is exciting because it gives us a chance to make a meaningfully positive difference in the lives of our customers and to learn and grow together in the process. Our customers teach us how they learn and what makes a difference in their lives, and we aim to offer them learning opportunities that lead to a better life for all.

The language of the law in South Africa is a barrier to access to justice

How challenging the traditional language of the law led to challenging the traditional plain language approach to communicating with users in complex contexts.

Candice Burt and Frances Gordon

The principle of access to justice is sound in South Africa

Access to justice for South African citizens is recognised as a cornerstone of democracy and good governance. South Africa has had a progressive Constitution[1] for the past 26 years, and our Bill of Rights enshrines the rights of all its people. The principle of access to justice developed from the Constitutional right that all people should enjoy equality before the law.[2]

To ensure that every person receives fair and equal treatment in the legal system, it is crucial to have a legal framework that protects people's rights and that is known and comprehensible to ordinary people. People of different races, genders, ages, abilities, sexual orientation, home languages and economic and social backgrounds should be confident that the laws will be fairly and impartially applied.

Under the South African Constitution, no one is above the law, and no one is below the law, regardless of their backgrounds and standing. Despite this, South African citizens experience several serious barriers to access to justice, such as costs, corruption, the lack of legal counsel, the complexity of the law, and the language it is couched in.

This article focuses on how the language of the law–and in particular, the Notice of Rights–is an obstacle to justice for people who are arrested, detained, and imprisoned in South Africa.

The Bill of Rights bolsters the Constitutional promises…

In South Africa, the purpose of arresting and detaining a person suspected of having committed a crime is to ensure that the accused attends a trial before a court where:

- the state will present evidence of guilt; and
- the accused person will either admit their guilt or defend their innocence.

The Bill of Rights sets out in detail the rights afforded to its citizens who may be arrested and detained. There is the right to freedom and security of the person, which includes the rights to not be deprived of freedom arbitrarily or without just cause or to be detained without trial. The right to just administrative action provides that everyone has the right to administrative action that is lawful, reasonable, and

1 Constitution of the Republic of South Africa Act, 200 of 1993, https://www.gov.za/documents/constitution/constitution-republic-south-africa-act-200-1993

2 Constitution of the Republic of South Africa, Chapter 2, Bill of Rights, section 33.

procedurally fair. All arrested people have some nine rights, including the right to be released from detention if the interests of justice permit, subject to reasonable conditions; in other words, the right to bail.

. . . yet detention without trial persists

Sibusiso Mavuka has been in prison in South Africa for thirteen years. Arrested in 2008, Mavuka was taken into police custody. He was not granted bail. His trial at court started only at the end of 2016 – and is still not complete. Mavuka has appeared in court on over 90 occasions, but there have been numerous postponements to his case. He has remained in detention these past thirteen years but has not been convicted of a crime. In that time, his son who was five months old at the time of the arrest has grown up without a father.

While we do not know the crime Mavuka is accused of, it is possible that his pre-trial detention is longer than the sentence that would apply if he were found guilty. This summary punishment goes against everything the drafters of the Constitution intended to prevent.

Pre-trial prisoners contribute to overcrowding in prisons

You may ask how this could happen in a country with an openly transformative justice agenda. To ensure that the apartheid regime's policy of detention without trial would never again occur, the Bill of Rights aims to ensure equality between the two sides in a criminal matter, especially considering the power of the state compared to individuals' lack of power.

And yet this story is not unique to Mavuka. There are over 47,000[3] people in South African prisons who have not been convicted of a crime and are awaiting trial. Many of them have spent years behind bars waiting for their turn at court.

Of course, there are valid reasons for denying bail, for example, if the accused is a threat to their own or another's safety, or if there is a chance that the accused may flee the country and not appear at court for their trial. But in many cases the offence they are charged with is minor and would not warrant a prison sentence at all.

According to the Department of Correctional Services, around half of all prisoners in South African prisons are those awaiting trial. The result of the continued detention of pre-trial prisoners is overcrowding at prisons. Apart from denying the right to liberty, the overcrowding in prisons erodes other socio-economic rights, for example, the right to medical treatment and adequate accommodation. In 2020, there were five people for every two beds in prisons in South Africa.[4]

Every person's time in prison starts with an arrest

The law provides that an arrested person must be informed of their rights under the Constitution and in a language that they understand. Our company, Simplified, decided to use this starting point to examine how the language of the law can improve access to justice. We started by interviewing people who had been arrested in South Africa, as well as arresting officers and defence attorneys.

In response to a question about how to inform arrested people of their rights, a respondent replied,

> *I think knowing your rights is good because when you get arrested you don't know where you are or what is happening.*

Candice Burt is an internationally known plain-language lawyer who passionately advocates for clear business documents and legislation. For over 20 years, she's helped organisations around the globe to transform legal, financial, technical and medical jargon into clear, understandable and accessible content. In 2002, she founded South Africa's first plain-language consultancy, which became Simplified in 2005 when she joined forces with Frances Gordon.

Candice coaches legal professionals in effective writing principles and is a lecturer for the Master's Degree in Technical Communication and Localization (University of Strasbourg). Candice is a past president of Clarity International.

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3 http://www.dcs.gov.za/wp-content/uploads/2020/11/DCS-Annual-ReportTABLING-FINAL.pdf

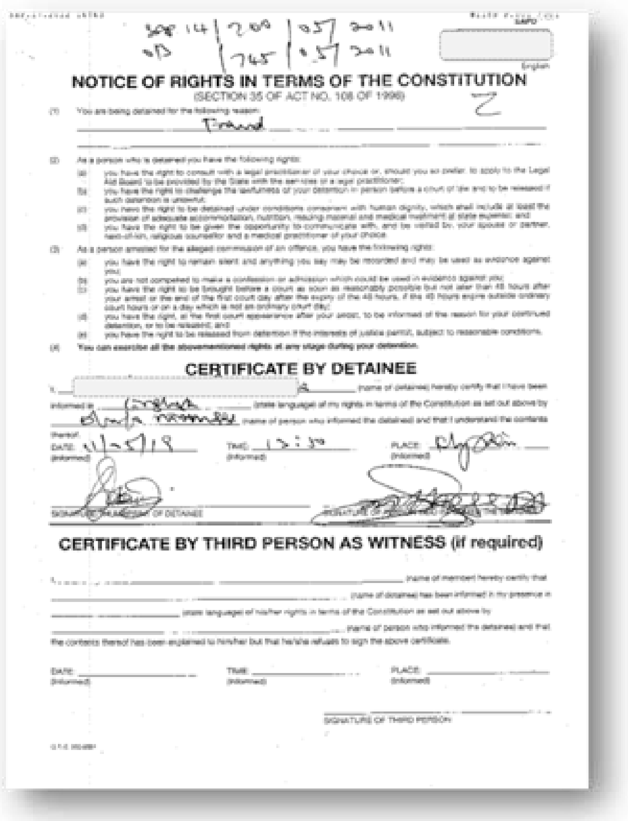
4 https://www.hrw.org/reports/1994/southafrica/4.htm

Frances Gordon started her career far from the corporate arena – she researched and wrote educational materials for community development projects in rural parts of sub-Saharan Africa. In 1998, she first moved to London to work for information-design consultancy, Siegel & Gale. This was the beginning of a career that would crisscross continents for decades. Frances' mission has remained constant: to bridge divides – in education, in financial and legal services, and in digital access. Her career is diverse: she co-founded the plain-language training and consultancy firm, Simplified; she has also held tenures as Head of Content and Brand at a financial inclusion fintech and Senior Content Strategist at Barclaycard. Her recent consultancy work ranges from legal writing and design to developing brand narratives and content strategies for financial and legal companies.

The Notice of Rights informs the arrested person about their rights

The Notice of Rights is a constitutionally mandated notice that must be given to any person who is arrested in South Africa. The arrested person is required to sign the notice as evidence that they have been informed of their rights. (Of course, *informed* implies some level of comprehension, but the law does not require that the person understands, merely that they have been informed.)

Figure 1 shows the current Notice of Rights; Figure 2 is an excerpt of its text.



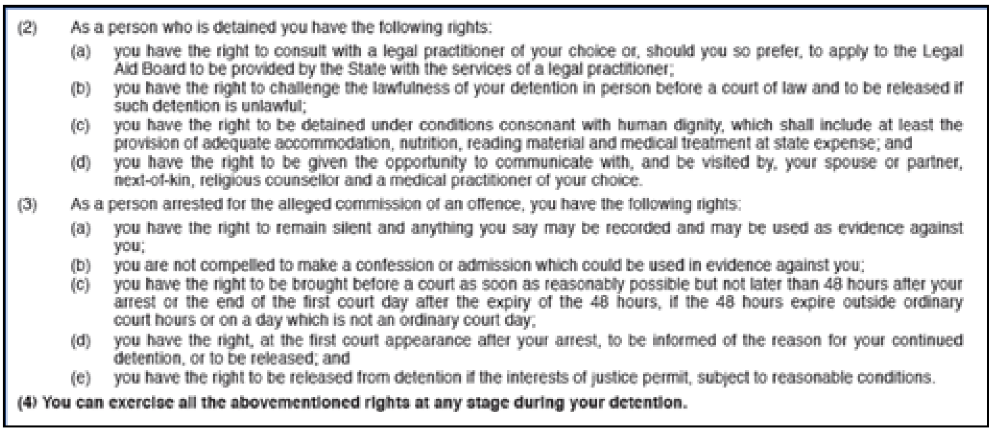
NOTICE OF RIGHTS IN TERMS OF THE CONSTITUTION

(SECTION 35 OF ACT NO. 108 OF 1996)

CERTIFICATE BY DETAINEE

CERTIFICATE BY THIRD PERSON AS WITNESS (if required)

Figure 1: Notice of Rights in Terms of the Constitution (South Africa)



(2) As a person who is detained you have the following rights:

(a) you have the right to consult with a legal practitioner of your choice or, should you so prefer, to apply to the Legal Aid Board to be provided by the State with the services of a legal practitioner;

(b) you have the right to challenge the lawfulness of your detention in person before a court of law and to be released if such detention is unlawful;

(c) you have the right to be detained under conditions consonant with human dignity, which shall include at least the provision of adequate accommodation, nutrition, reading material and medical treatment at state expense; and

(d) you have the right to be given the opportunity to communicate with, and be visited by, your spouse or partner, next-of-kin, religious counsellor and a medical practitioner of your choice.

(3) As a person arrested for the alleged commission of an offence, you have the following rights:

(a) you have the right to remain silent and anything you say may be recorded and may be used as evidence against you;

(b) you are not compelled to make a confession or admission which could be used in evidence against you;

(c) you have the right to be brought before a court as soon as reasonably possible but not later than 48 hours after your arrest or the end of the first court day after the expiry of the 48 hours, if the 48 hours expire outside ordinary court hours or on a day which is not an ordinary court day;

(d) you have the right, at the first court appearance after your arrest, to be informed of the reason for your continued detention, or to be released; and

(e) you have the right to be released from detention if the interests of justice permit, subject to reasonable conditions.

(4) You can exercise all the abovementioned rights at any stage during your detention.

Figure 2: Excerpt of Notice of Rights for arrested persons

The notice reflects the unequal power relationship

Traditional legal language both creates and reinforces the unequal power relationship between the justice mechanisms on one side, and the 'user' of the law on the other.

Plain language can dismantle this power imbalance. For example, if a user cannot understand a legal term, the writer is responsible to ensure that there is an adequate explanation, or to replace the legal term with more familiar wording. It is not the user's responsibility to learn what the legal term means; rather, the writer must use language that is easy for the user to access . . . and use.

The Notice of Rights reflects an unequal power relationship from the outset. The titles and headings do not refer to arrest or detention. In fact, the language is so generic that it gives no context at all to the user. What is a notice? What is a certificate? What rights are being explained?

The information in the notice is designed as a traditional legal document, with long spaces for the arrested person to fill in their details by hand. The structure of the notice is not intuitive – logical, perhaps, in the eyes of the writer, but not the user. The rights are divided into two sections, (2) and (3), but then clause (4) tells the user that all rights apply at all times, rendering the division redundant. For an arrested person, the most important right is the right to bail, yet this information is buried at the end of the notice (in (3)(e)) and is written in such obscure language (*released from detention*), that the user is likely to miss what could make a difference to their understanding of their rights. Indeed, none of the respondents that we interviewed was able to identify that there was a right to bail in the notice at all.

The notice contains many convoluted and unnecessarily complex sentences. Clause (3)(c), for example, is a sentence that gives more words than meaning. The words themselves are complex (*consonant with human dignity, make an admission, if the interests of justice permit*). As one respondent noted when looking at the current notice:

> *What does that mean--the interests of justice? Whose justice–theirs or mine? Basically, it is saying that they will decide what happens to you.*

Another problem is that the form is only widely available in two languages–English and Afrikaans. This excludes the most common languages in South Africa. For example, isiZulu is spoken by 23% and isiXhosa by 16% of the population.[5]

In short, the notice holds linguistic and design markers of a top-down approach. It puts power solely in the hands of the state, and all but ignores the rights of the arrested person.

To reduce the power imbalance, we started with context not legalities

To reduce this imbalance, we started with by considering who the intended user of the notice is and what situation they are in when they engage with the content.

We discovered that an approach based on literacy levels is not useful

South African law refers to 'average literacy level' of the target audience in its definition of plain language.[6] In the OECD definitions relating to literacy, there are three related definitions: literate; functionally literate; and functionally Illiterate.[7]

The South African government gives the adult illiteracy rate as 12%,[8] which means that 4.4 million people are functionally illiterate. This is measured by the number of people who have not passed Grade 7 (or its equivalent). Although South Africa draws on years spent in school to measure functional illiteracy, defining literacy in this way is problematic as there is no standard definition of functional illiteracy. A recent literature review[9] noted:

> Many methods have been used to identify functional illiterates, but none of these methods are yet standardized and systematically diagnostically evaluated in a representative sample of functional illiterates and adults.

5 https://southafrica-info.com/arts-culture/11-languages-south-africa/ as accessed on 15 November 2021.

6 Consumer Protection Act, 68 Of 2008, section 22, https://www.gov.za/sites/default/files/32186_467.pdf

7 OECD (The Organisation for Economic Co-operation and Development), Glossary of statistical terms, https://stats.oecd.org/glossary/detail.asp?ID=1279 as accessed on 15 November 2021.

8 Mamphokhu K: 'Fact sheet: Literacy in South Africa', Department of Education and Training, South African Government; https://www.dhet.gov.za/Planning%20Monitoring%20and%20Evaluation%20Coordination/Fact%20Sheet%20on%20Adult%20Illiteracy%20in%20South%20Africa%20-%20March%202021.pdf as accessed 15 November, 2020.

9 Vágvölgyi, R, Andra Coldea A, Dresler T, Schrader J, Nuerk, H: 'A Review about Functional Illiteracy: Definition, Cognitive, Linguistic, and Numerical Aspects'Front. Psychol., 10 November 2016 | https://doi.org/10.3389/fpsyg.2016.01617, as accessed on 15 November 2021.

Therefore, they cannot be considered adequate for measuring and identifying functional illiterates based on the current data.

Assessing plain language from an education-based literacy level is a flawed methodology: it leads to the false notion that the more educated a user is, the more likely that they will understand a legal notice such as the Notice of Rights.

The language challenges, worsened by the stress of an arrest process, would make the notice impossible to read for many users, even educated ones. An arresting officer explained the problem to us:

> *People are in a very emotional state when they are arrested, and we know they don't always understand what we say. This language [in the Notice] is very legalistic, so we do sometimes put it in our own words, but they still have to sign this one.*

We rewrote the notice in plain language

As a first step, we rewrote the notice into plain language. We structured the notice to clearly show the nine rights that people have when they are arrested or detained. We translated the plain-language text into eight South African languages. However, we realised that we still had not addressed the many other languages that are used in South Africa and would still be inaccessible to blind and visually impaired users.

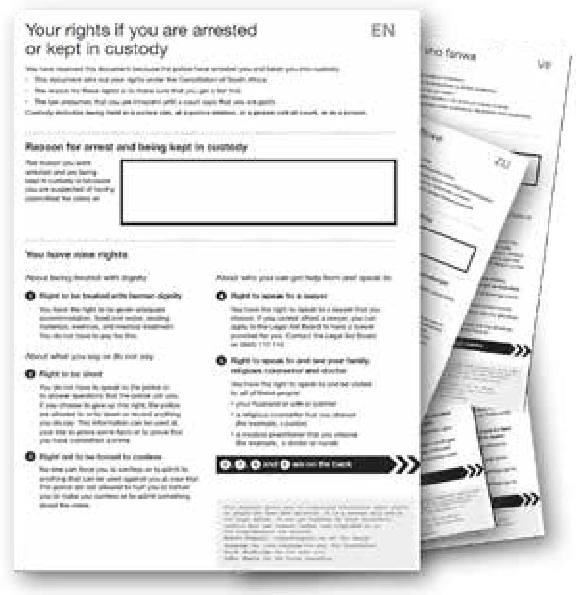

Your rights if you are arrested or kept in custody
EN
Reason for arrest and being kept in custody
You have nine rights

Figure 3: Rewritten rights in various South African languages

We realised that rewriting the notice into another text document was not enough. When a person is arrested, they are likely to be incapable of focusing sufficiently to read and understand a document. We also found that the arresting officers do not speak all the languages of the people that they arrest, so relying on the officer to read or explain the rights is neither realistic nor impartial.

We then produced audio versions

The insight we gained from exploring the text version led us to another strategy: audio. We engaged the services of voice artists to record themselves reading the plain language notice. We then tested these versions (which were in isiZulu and English) with our respondents.

We heard many positive comments about audio versions both from people who had been through the experience of being arrested, as well as from arresting officers. Here are a few of their responses:

> *I think it is great if somebody reads your rights to you like this. Especially as they are removed from the situation, so they are not aggressive or threatening.* (Person who had been arrested)

If we could get our powers that be to invest in something like this, it would be so useful for us officers. And if we could record our giving the rights, less of the cases will be thrown out for that reason. (Arresting officer)

But more analysis of the context led us to appreciate that the person arrested still might not be able to understand or use this information. The audio versions in the arrested person's own language might not be available, and there is the potential for cognitive overload in this stressful context. It might mean that the arrested person would be incapable of understanding the information, no matter how clearly it was presented to them.

Our third prototype introduced another primary audience

We needed another channel. We realised that in this context, the user of the Notice of Rights was not the arrested person at all – but instead could be a friend or relative that could help them. From this standpoint, we developed a prototype of a responsive website, which would allow an arrested person to inform a friend or family member about their arrest and their rights under the law. That friend or family member would then be able to access plain-language information about an arrested person's rights from the website, which, in turn, could empower them to advocate for the arrested person.

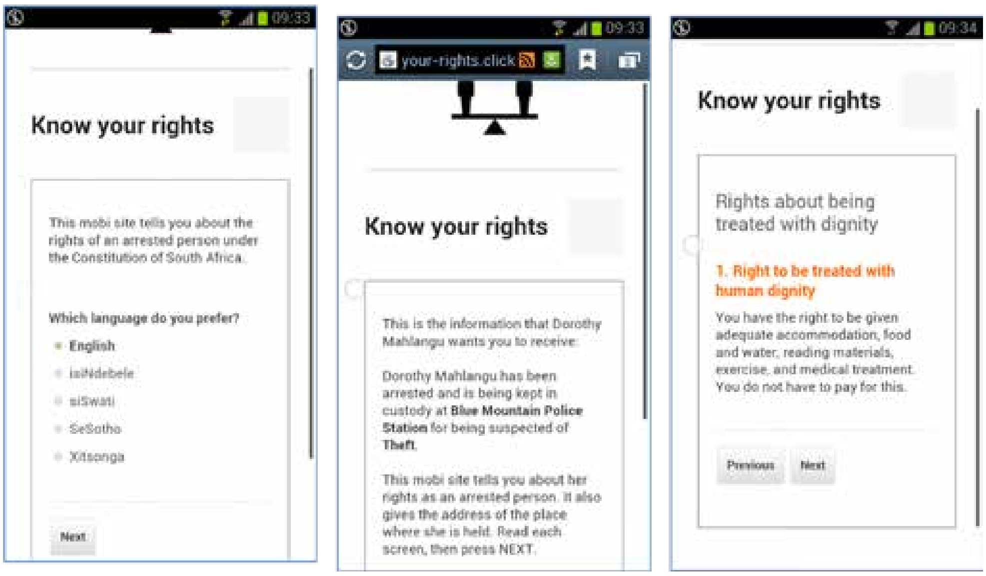


Figure 4: Prototype responsive website for arrested person's rights

Lessons learnt and thanks

From our exploration of the language of the law in the context of access to justice, we learnt that, as plain language practitioners, we need to draw on the experience of the users – co-creating with them so that we can produce content in the user's context, and not in our own. This approach may even result in a shift of thinking of who the primary audience of the content really is.

Our thanks to the many contributors to our project: Robert Hempsell (document design), Garth Shoebridge (website prototype), Language Inc (translations), Shaeleen Tobin and Sifiso Thwala (voice artists), and the respondents (users) who helped to push our thinking beyond the traditional plain language approach.

ELIPS and what it can do for you

Aino Piehl

The ELIPS project group is delighted to inform you about the publication of its new website. The website presents a unique survey where you can find data about policies and actions by European public authorities, regarding for example the use of plain language, easy-to-read language, terminology or the training of civil servants.

ELIPS – Use of European Languages in the Public Sphere – is a project of EFNIL, the European Federation of National Institutions for Language. The project concerns the use of the national languages of Europe as instruments of communication for government, legislation, and public administration. It collects data, organises the exchange of opinion and experiences amongst EFNIL members and prepares actions and proposals relating to its fields of interest.

Our interactive web page enables users to navigate through the results of a survey which was conducted between 2017 and 2019 among 24 European countries. The survey gives users an overview of the situation in Europe and allows them to compare the actions and policies of public authorities in the following domains:

- plain language and easy-to-read language;
- official terminology for government, legislation and public administration;
- languages other than the official one(s) in the authorities' communication;
- cultural, sexual and gender diversity;
- training of civil servants and the aspects covered by training programmes;
- collaboration (structures) between EFNIL's member states and the EU.

For further information on the survey and how to use it, go to https://elips.efnil.nytud.hu/. The survey itself can be consulted at https://elips.efnil.nytud.hu/browse.

Overview of results in an article

You can find the most important results of the survey, including the group's recommendations for action, in an article on the project's webpage at http://efnil.org/projects/elips/articles.

ELIPS project in the future

The ELIPS group hopes that the survey may serve as a reference base for concrete activities, such as conferences and webinars, partner search, formulating policy proposals for national governments and the institutions of the European Union. An important aim of the project is stimulating dialogue and collaboration.

We also plan a new round of data collection, in order to update the information. We hope to expand the survey to include more countries and, if necessary, to more sub-domains and aspects of public service communication.

Producing timely and relevant information for young autistic adults

Involving the target audience to develop tailored financial literacy material

Chantale Audet and Amélie Bourret

Chantale Audet is a medical anthropologist. She cofounded Autrement dit, a Quebec-based consulting firm that supports organizations and companies who seek to be effective in their communications through plain language. Autrement dit has recently won two ClearMark awards.

She previously worked in public health for many years where she was, notably, editor-in-chief of a baby guide titled *From Tiny Tot to Toddler*. During those years, she gained a solid experience writing for the public in plain language, doing health literacy work.

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Introduction

Producing timely and relevant information for their target audience is usually the number one objective for any plain language practitioner. It is, however, not always easy to achieve. Consulting members of your target audience might be the key to meet that objective – even more so if your target audience has special needs.

To develop financial literacy educational material for young autistic people, we decided to engage in a consultative process based on plain language principles. The result was a series of informational documents that gave young autistic adults access to financial information that is truly tailored to their needs.

In need of tailored financial literacy material

Autisme Québec is a Quebec City-based, nongovernmental organization that promotes and defends the rights of autistic people. Over the years, their director had observed many situations of young autistic people getting in various degrees of financial troubles.

For example, a young person would get a credit card without really understanding how it works and would rapidly get in serious debt. Others would frequently use ATMs to withdraw money without fully understanding that the money was coming from their own bank account. As a result, they would rapidly spend their money and run out before the end of the month.

More dramatic are the stories of those having to file for bankruptcy in their early twenties, and some of them more than once, until their parents or loved ones had to put them under trusteeship.

Autisme Québec's director and her team looked for financial literacy material to support autistic people in developing managing skills. They quickly realized, however, that nothing in French language was truly adapted to respond to young autistic people's needs.

The best option, then, seemed to develop tailored material. The objective was to produce teaching material to help young autistic people acquire basic financial competencies, so they could achieve the highest level of autonomy they can individually reach and have a certain control over their life. Research has shown that for autistic people, managing their own money increases autonomy and the quality of life (Cheak-Zamora N.C. et al., 2017).[1] Ultimately, acquiring money skills contributes to helping them becoming citizens that make a positive contribution to society.

Autrement dit, our plain language consulting firm, had the immense privilege to be chosen to develop the material.

1 Cheak-Zamora N.C. et al., (2017) "Financial Capabilities Among Youth with Autism Spectrum Disorder", *Journal of Child Family Studies*. 26: 1310-1317.

Amélie Bourret
A medical anthropologist by training, Amélie Bourret worked in public health for 15 years.

Among other projects, she gained extensive experience writing for the general public in plain language while producing and editing the guide From Tiny Tot to Toddler. Over the years, she has also developed expertise in health literacy.

She cofounded Autrement dit, a Quebec consulting firm that offers services in plain language. Autrement dit has recently won two ClearMark Awards.

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A word on autism

Autism, also called autism spectrum disorder (or ASD), is a complex neurodevelopmental disorder. Put simply, this means that the brain of an autistic person did not develop the same way as it normally does. Impacts on a person's life are related to perceptions and socialization. ASD can affect the way a person communicates, interacts, behaves, and learns.[2]

It is important to emphasize that autism is not a mental health problem, but a condition, and that there is no medication to treat it. The name includes the word "spectrum" to refer to, as the National Institutes of Health describes it, " a wide range of symptoms, skills, and levels of disability in functioning."[3]

Concretely, some autistic people may have great skills and certainly little disability in functioning, while some others will need support their whole lives to conduct basic daily activities.

One common aspect to all people on the spectrum is that they are all able to learn and to develop a certain degree of skills if they are given the chance, especially if tools are developed to meet their specific needs.

Assessing information needs to develop tailored material

Knowing our audience and assessing their needs is at the heart of the plain language process. In the first step of this project, we aimed to find out more about young autistic adults' experience with money, as well as understanding their frames of reference about money and finances. To best understand their information needs, we had to find out:

- How they see and understand money management.
- What they already know. What they need to learn.
- What obstacles they encounter regarding money.
- How they get into trouble. What difficulties they encounter.

Financial issues were mostly reported to Autisme Québec by parents, siblings, and support professionals. Hence, we began our assessment by conducting interviews with parents and siblings who accompany an autistic person. We also conducted a focus group with support professionals of the health and social services whose mission is to help them with different aspects of life.

It is often difficult for young autistic people to identify their own precise needs. This could have been a challenge for our project. At this point, it was easier to assess needs with relatives and support professionals. We decided to wait until the next phase of the project to directly involve young autistic people. That way, we would have concrete materials to show them, and it would be easier to get them actively engaged.

The information we gathered during the interviews and focus groups was rich and helpful. The stories we were told were consistent with the experiences of Autisme Québec's team.

2 www.cdc.gov/ncbddd/autism/facts.html

3 www.ninds.nih.gov/Disorders/Patient-Caregiver-Education/Fact-Sheets/Autism-Spectrum-Disorder-Fact-Sheet

Key findings

What did we find out? First was that money skills are generally not acquired or sufficiently achieved when young autistic people begin to earn money.

Many reasons can explain that. One of them is that because they often must be taught many life skills that other children usually learn just by watching other people, with little training, autistic kids often fall behind.

Second, parents and support professionals do not feel equipped to teach financial skills; in fact, the management of personal finances is not easy to explain. People are not equally talented facing this task.

Furthermore, personal values and personal experiences may get in the way of teaching and formulating easy-to-understand explanations. Some parents adopted more of a protective attitude than a teaching mode.

We realized that although the autistic individuals themselves were our primary target audience, parents and support professionals were also to be part of our target audience because they would use the tool as a kind of teaching aid.

Identifying specific needs to tailor the material

In the interviews and the focus group we conducted, many specific topics about money management that needed to be addressed were identified. Also, specific needs for our target audience were mentioned.

The need for clear-cut and comprehensive information: One reason existing tools are not useful for this audience is because too often, the information they contain is not complete. The authors take for granted that some details or parts of information are not necessary, probably assuming that they are common knowledge. This important observation led us to make sure there would be no information gap.

The need for visual information: Another important specific need for our target audience has to do with the visual presentation. Many autistic individuals are visual and tend to think in images. For many of them, images help imprint information in their mind and memory. Illustrations were suggested to support and reinforce aspects of the texts like concepts and behaviours.

The need for a flexible, easy-to-consult format: The consultations helped us really understand that when the moment to begin to take care of money comes, young autistic people do not share the same foundation. They have different starting points. In fact, some young adults do not have the basic financial competencies necessary to develop financial literacy, while others have jobs, have some basic knowledge, and feel ready, for instance, to manage a credit card. It was therefore necessary to imagine a flexible format that could allow users to directly access the information they needed without having to go through other information they did not need.

We thus proposed that instead of one all-inclusive guide, the tool would be a set of documents, each presenting a specific topic.

Most importantly, there would have to be two sets of documents: the information needs were too diverse to be met in a single set of documents. This would not have appeared so evident if we had not taken the time to conduct the interviews before working on the content.

This current project includes a set of documents dedicated to people on the spectrum who have a greater autonomy and can manage their money themselves. A second phase of this project is currently underway to produce material for young adults who meet more life challenges.

Analyzing the topic needs

To analyze all the information we collected, we used the affinity diagramming technic, in the spirit of design thinking, to create a table of contents. In short, this technic seeks to help to translate the content of interviews and focus groups into user needs.

Using Post-its, we wrote themes, ideas, concerns and worries, each on its own Post-it. We arranged and rearranged the Post-its into broader themes until we reached a list of larger topics that would become a table of contents. Eventually, larger topics each became freestanding documents.

Topics that were most identified were put at the top of the list. Themes were assembled in a logical manner so that each document would be free-standing and could be used on its own, without having to read anything before. If one needed to learn about opening a bank account, the one document about that topic would give them all the information to do so.

Once we had a good organization, we presented our table of contents to various people for comments. In the end, we developed 18 topic documents.

Consulting and working with members of our target audience

Consulting and working with our target audience meant that we had to recruit people that would be willing to take part in it.

With the help of Autisme Québec, the support professionals we had interviewed and our personal relations, we found autistic people and parents who were willing to participate. Some of the support professionals we had met agreed to embark on this journey. These people contributed to the project for its whole duration.

Working with our target audience was a circular process. It meant going back and forth with content to make sure it was comprehensive and easy to understand.

For each document, we wrote a first version and had members of the target audience read and comment it. We let them decide the best way to forward their comments. Some wrote them; others shared their comments and ideas during a phone conversation. In both cases, we were able to ask questions and dig for more information. Sometimes, a mother and her son would read a document together, discuss it and send us feedback.

Another example of consultation included a support professional who had a few people read and comment and discuss the content with them. This was particularly helpful for tougher topics such as income tax.

In addition to comments, we asked questions that revealed more informative and helped us see information gaps, as well.

As we could not assume that this audience had basic knowledge about topics, each document had to be complete. To illustrate, if we were writing about revenue, we had to explain everything from scratch: what is gross income, what is net income, for instance. This seems to go without saying, but a surprising number of financial education tools do not include comprehensive information.

Making sure that our content was clear, complete, and usable could only be achieved by going back and forth with target audience members, as many times as needed, so they could help us figure out if we were doing it right.

Members of our target audience read, commented, and asked questions about the content. On our part, we adjusted the documents and consulted again and again, until satisfaction.

Consulting and working with members of our target audience brought depth to our project

Working with target audience members brings a lot more than comments on content. It helps us better understand their reality, their profound needs, and their preferences. In other words, working with them helps us, writers, to understand their perspectives.

In this project, among other gains we had from working with members of the target audience, we can name:

- Awareness of issues that did not arise during the needs assessment
- Suggestions for illustrations
- Deeper understanding of our target audience and their specific needs regarding autism and its particularities

Because this process happened over several months, we were able to adjust the documents as our knowledge and understanding deepened. The adjustments were made not only to the content but also to the layout of the documents. This whole process enriched the 18 topic documents in a way that it would have otherwise not been possible.

A teamwork

To carry out this project, we needed help from people with different expertise. We had to involve personal-finance-management specialists, a graphic designer, and a copy editor. These people had to be briefed so we would all share a common understanding of our target audience–a key component for a successful process.

To illustrate, the collaboration with the graphic designer was important. The idea was not simply to have visually pleasing documents, but to apply plain-language design principles. The documents had to be free of visual pollution and clutter; they needed to avoid any unnecessary visual distractions that would interfere with our audience’s specific needs. We all had to keep in mind that autistic people can easily lose their focus while reading.

On top of having a good design, we had to illustrate some of the concepts and behaviours.

Illustrations are a good way to support and reinforce aspects of the content. Because they are not realistic like pictures, illustrations can be helpful if they show just an idea or a behaviour, to help avoid unnecessarily distracting details.

We had the chance to know a young illustrator who happens to be on the autism spectrum. He created several illustrations, as well as giving us his input on the content. He was able to bring his vision, understanding, personal experience, and a little humour to the documents through his art. This was a bonus for this project!

Last thoughts

Tailoring information for a specific group is best achieved when members of the audience are involved as early as possible in the project. In this sense, their involvement goes beyond simply checking at the end of a project if a document pleases them.

In fact, it means being open-minded and ready to change plans, to rewrite some parts, add new content and take out some other parts.

Consulting and working with members of our target audience can be viewed as a kind of guarantee. In the too often absence of project evaluation, including members of our target audience becomes a guarantee that all was done to truly meet their specific needs.

Truth be told, target audience members are the ultimate experts of their needs and desires. Working without them when trying to tailor information would be like asking a tailor to make a perfectly fit suit without never meeting the person who will wear it. As for creating tailored documents, what better approach is there than a plain language process?

Produire de l'information pertinente

Impliquer le public cible dans l'élaboration de matériel d'éducation financière sur mesure

Chantale Audet et Amélie Bourret

Chantale Audet est anthropologue médicale. Elle a cofondé Autrement dit, une entreprise qui offre des services-conseils et qui accompagne les organisations et les entreprises qui cherchent à être efficaces dans leur communication, grâce au langage clair. Autrement dit a récemment remporté deux ClearMark Awards.

Auparavant, elle a travaillé pendant de nombreuses années en santé publique où elle a notamment été rédactrice en chef d'un guide destiné aux parents, intitulé Mieux vivre avec notre enfant de la grossesse à deux ans. Au cours de ces années, elle a acquis une solide expérience de rédaction en langage clair et simple ainsi qu'en littératie en santé.

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Introduction

Produire de l'information pertinente pour leur public cible est généralement l'objectif numéro un de tout praticien du langage clair et simple. La communiquer au bon moment l'est tout autant. Cet objectif n'est toutefois pas toujours facile à atteindre. Consulter les membres de votre public cible peut toutefois être la clé pour atteindre cet objectif. Et, c'est encore plus vrai si votre public cible a des besoins particuliers.

Pour élaborer du matériel éducatif dans le domaine de la littératie financière à l'intention de jeunes adultes autistes, nous avons décidé de nous engager dans un processus consultatif fondé sur les principes du langage clair et simple. Le résultat de ce projet est la création d'une série de documents d'information qui donnent accès, aux jeunes adultes autistes, à de l'information financière réellement adaptée à leurs besoins.

À la recherche d'information d'éducation financière réellement adaptée

Autisme Québec est un organisme non gouvernemental basé à Québec qui œuvre à la promotion et à la défense des droits des personnes autistes. Au fil des années, sa directrice a observé de nombreuses situations où de jeunes adultes autistes se sont trouvés aux prises avec des difficultés financières plus ou moins importantes.

Par exemple, un jeune adulte autiste a obtenu une carte de crédit sans vraiment comprendre comment elle fonctionnait et il s'est endetté rapidement. D'autres ont utilisé fréquemment les guichets automatiques pour retirer de l'argent sans comprendre que l'argent provenait de leur propre compte. En conséquence, ils ont dépensé rapidement leur argent et se sont retrouvés à court d'argent avant la fin du mois.

Plus dramatiques encore sont les histoires de ceux qui ont dû faire faillite au début de la vingtaine, et certains plus d'une fois, jusqu'à ce que leurs parents ou leurs proches aient dû les mettre sous tutelle.

La directrice d'Autisme Québec et son équipe ont cherché du matériel d'éducation financière pour soutenir les personnes autistes dans le développement de leurs compétences en gestion de leurs finances personnelles. Elles se sont toutefois rapidement rendu compte qu'il n'existait pas de matériel en français vraiment adapté pour répondre aux besoins des jeunes adultes autistes.

La meilleure option semblait donc de développer du matériel sur mesure. L'objectif était de produire du matériel pédagogique pour aider les jeunes adultes autistes à

Anthropologue médicale de formation, **Amélie Bourret** a travaillé en santé publique pendant 15 ans. Entre autres projets, elle a acquis une grande expérience de la rédaction en langage clair et simple pour le grand public en produisant et en éditant le guide Mieux vivre avec notre enfant de la grossesse à deux. Au fil des années, elle a également développé une expertise en littératie en santé.

Elle a cofondé Autrement dit, une entreprise québécoise de services-conseils de réécriture en langage clair. Autrement dit a récemment remporté deux ClearMark Awards.

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acquérir des compétences financières de base. Ainsi, ce matériel leur permettrait de parvenir au plus haut niveau d'autonomie qu'ils pourraient individuellement atteindre et d'exercer un certain contrôle sur leur vie. Une recherche a démontré que, pour les personnes autistes, la gestion de leur propre argent augmente l'autonomie et la qualité de vie (Cheak-Zamora N.C. et coll., 2017).[1] En fin de compte, l'acquisition de compétences en matière de finances personnelles contribue à aider les personnes autistes à devenir des citoyens qui participent positivement à la société.

Notre entreprise de services-conseils de réécriture en langage clair et simple, Autrement dit, a eu l'immense privilège d'être choisie pour développer ce matériel.

Un mot sur l'autisme

L'autisme, également appelé trouble du spectre autistique (ou TSA), est un trouble neurodéveloppemental complexe. En termes simples, cela signifie que le cerveau d'une personne autiste ne s'est pas développé comme il le fait normalement. Les répercussions sur la vie d'une personne sont liées aux perceptions et à la socialisation. Le TSA peut affecter la façon dont une personne communique, interagit, se comporte et apprend.[2]

Il est important de souligner que l'autisme n'est pas un problème de santé mentale et qu'il n'existe aucun médicament pour le traiter. Le nom comprend le mot « spectre » pour désigner, comme le décrit le National Institutes of Health, « un large éventail de symptômes, d'aptitudes et de niveaux de handicap dans le fonctionnement au quotidien »[3].

Concrètement, certaines personnes autistes peuvent avoir de grandes compétences et peu de difficultés à fonctionner au quotidien, tandis que d'autres auront besoin d'un soutien toute leur vie pour effectuer les activités quotidiennes de base.

Un aspect commun à toutes les personnes qui sont sur le spectre de l'autisme est qu'elles sont toutes capables d'apprendre et de développer des compétences si on leur en donne la chance, surtout si des outils sont développés pour répondre à leurs besoins spécifiques.

Évaluer les besoins d'information pour élaborer du matériel sur mesure

La connaissance de notre public cible et l'évaluation de ses besoins sont au cœur du processus de rédaction en langage clair et simple. Dans la première étape de ce projet, nous avons cherché à en savoir plus sur l'expérience des jeunes adultes autistes en matière de gestion de finances personnelles, ainsi qu'à comprendre leurs cadres de référence concernant l'argent et les finances. Pour mieux comprendre leurs besoins en matière d'information, nous avons dû nous renseigner sur ces sujets :

- Comment ils perçoivent et comprennent la gestion de l'argent.
- Ce qu'ils savent déjà et ce qu'ils ont besoin d'apprendre.
- Les obstacles qu'ils rencontrent avec l'argent.
- Comment ils se retrouvent dans des situations fâcheuses. Quelles sont les difficultés qu'ils rencontrent.

Les problèmes financiers des personnes autistes sont surtout rapportés à Autisme Québec par les parents ainsi que la fratrie. Des intervenants sont également témoins des difficultés financières rencontrées. Nous avons donc commencé notre

1 Cheak-Zamora N.C. et al., (2017) "Financial Capabilities Among Youth with Autism Spectrum Disorder", *Journal of Child Family Studies*. 26: 1310-1317.

2 www.cdc.gov/ncbddd/autism/facts.html

3 www.ninds.nih.gov/Disorders/Patient-Caregiver-Education/Fact-Sheets/Autism-Spectrum-Disorder-Fact-Sheet

évaluation des besoins par des entrevues avec des parents, des frères et des sœurs qui accompagnent une personne autiste. Nous avons également mené un groupe de discussion avec des intervenants issus du réseau de la santé et des services sociaux ont la mission est de soutenir les personnes autistes dans différents aspects de la vie.

Il est souvent difficile pour les jeunes adultes autistes d'identifier précisément leurs besoins. Leur demander de leur faire aurait pu être un défi pour notre projet. À cette étape du projet, nous avons donc jugé qu'il était préférable d'évaluer les besoins avec les proches et les intervenants. C'est pourquoi nous avons décidé d'attendre une étape ultérieure du projet pour impliquer directement des personnes autistes. Ainsi, nous aurions du matériel concret à leur montrer, et il serait plus facile de les faire participer activement.

L'information que nous avons recueillie au cours des entrevues et des groupes de discussion a été riche et utile. Les histoires qui nous ont été racontées correspondaient aux situations observées par l'équipe d'Autisme Québec.

Principaux résultats

Qu'avons-nous découvert ? Tout d'abord, que les compétences en gestion des finances personnelles ne sont généralement pas acquises ou suffisamment développées lorsque les personnes autistes commencent à gagner de l'argent.

De nombreuses raisons peuvent expliquer cela. L'une d'entre elles est que les enfants autistes prennent souvent du retard dans leurs apprentissages parce qu'il faut leur enseigner de nombreuses compétences de la vie courante alors que les autres enfants les apprennent généralement en observant ou avec peu d'entraînement.

Deuxièmement, les parents et les intervenants ne se sentent pas outillés pour enseigner les compétences financières. En fait, la gestion des finances personnelles n'est pas facile à expliquer. Les gens n'ont pas tous de la facilité pour réaliser cette tâche.

De plus, les valeurs et les expériences personnelles peuvent faire obstacle à l'enseignement et à la formulation d'explications faciles à comprendre. Certains parents adoptent alors une attitude plus protectrice que pédagogique.

Devant ces résultats, nous avons réalisé que même si les personnes autistes elles-mêmes constituaient notre principal public cible, les parents et les intervenants devaient également en faire partie, car ils utiliseraient l'outil comme aide pédagogique.

Identifier les besoins spécifiques pour adapter le matériel

Les entrevues et le groupe de discussion que nous avons menés ont permis d'identifier de nombreux thèmes à aborder sur la gestion des finances personnelles. De plus, des besoins précis, spécifiques à notre public cible ont également été mentionnés.

Le besoin d'une information claire et complète : L'une des raisons pour laquelle les outils existants ne sont pas utiles pour ce public cible est que, trop souvent, l'information qu'ils contiennent n'est pas complète. Les auteurs tiennent pour acquis que certains détails ou parties d'information ne sont pas nécessaires, supposant probablement qu'ils sont connus de tous. Cette observation importante nous a amenées à nous assurer que le contenu soit complet et sans omission d'information.

Le besoin d'une information visuelle : Un autre besoin, spécifique à de notre public cible, a trait à la présentation visuelle. De nombreuses personnes autistes sont visuelles et ont tendance à penser en images. Pour beaucoup d'entre elles, les images aident à imprimer l'information dans leur esprit et leur mémoire. Dans le cadre de ce projet, des illustrations ont été suggérées pour soutenir et renforcer certains aspects des textes comme les concepts et les comportements.

Le besoin d'un format flexible et facile à consulter : Les consultations nous ont permis de vraiment comprendre que lorsque les jeunes adultes autistes commencent à s'occuper de leurs finances personnelles, ils ne partagent pas tous les mêmes connaissances de base. Ils ont des points de départ différents. En d'autres mots, certains jeunes adultes autistes n'ont pas les compétences financières de base nécessaires pour développer leur littératie financière, tandis que d'autres ont un emploi, ont quelques connaissances de base et se sentent prêts, par exemple, à gérer une carte de crédit. Il était donc nécessaire d'imaginer un format flexible qui puisse permettre aux utilisateurs d'accéder directement à l'information dont ils ont besoin, sans avoir à lire de l'information qui n'était pas pertinente pour eux à ce moment précis.

Nous avons donc proposé qu'au lieu d'un seul guide contenant tous les sujets, l'outil soit un ensemble de documents, chacun présentant un sujet spécifique.

Mais surtout, nous avons constaté qu'il faudrait deux séries de documents : les besoins d'information étaient trop divers pour être satisfaits par une seule série de documents. Cela n'aurait pas paru aussi évident si nous n'avions pas pris le temps de mener les entrevues avant de travailler sur le contenu.

Le projet actuel comprend donc un ensemble de documents dédiés aux personnes du spectre de l'autisme qui ont une plus grande autonomie et qui peuvent elles-mêmes gérer leurs finances personnelles. Une deuxième phase de ce projet est en cours pour produire des documents destinés aux jeunes adultes qui rencontrent davantage de difficultés dans leur vie.

Analyser les besoins pour déterminer les sujets à aborder

Pour analyser toutes les informations recueillies et créer une table des matières, nous avons utilisé la technique du diagramme d'affinité, dans l'esprit du design thinking. En bref, cette technique vise à traduire le contenu des entrevues et des groupes de discussion en besoins des utilisateurs.

À l'aide de Post-it, nous avons écrit des thèmes, des idées, des préoccupations et des inquiétudes, chacun sur son propre Post-it. Nous avons ensuite organisé et réorganisé les Post-it en thèmes plus larges jusqu'à ce que nous arrivions à une liste de sujets plus importants qui deviendraient le contenu de la table des matières. Finalement, les sujets les plus importants ont chacun mené à la création d'un document distinct. Tous ces documents composent la série.

Les thèmes les plus nommés lors des consultations ont été placés en haut de la liste. Ils ont été regroupés de manière logique afin que chaque document soit autonome et puisse être utilisé seul, sans avoir à lire quoi que ce soit avant. Si quelqu'un avait besoin d'apprendre comment ouvrir un compte, le seul document sur ce sujet lui donnerait toute l'information nécessaire.

Une fois que nous avons eu une bonne organisation, nous avons présenté notre table des matières à diverses personnes pour obtenir des commentaires. Au total, nous avons élaboré 18 documents.

Consulter et travailler avec les membres de notre public cible

Consulter et travailler avec notre public cible signifiait que nous devions recruter des personnes qui voudraient s'impliquer dans notre démarche.

Avec l'aide d'Autisme Québec, des intervenants que nous avions interviewés et de nos relations personnelles, nous avons trouvé des personnes autistes et des parents qui étaient prêts à participer. Certains intervenants que nous avions rencontrés ont accepté de se lancer dans cette aventure. Ces personnes ont contribué au projet pendant toute sa durée.

Le travail avec notre public cible a été un processus itératif. Nous avons dû faire des allers-retours avec le contenu pour nous assurer qu'il était complet et facile à comprendre.

Pour chaque document, nous avons rédigé une première version que nous avons fait lire et commenter par des membres de notre public cible. Nous les avons laissé décider de la meilleure façon de transmettre leurs commentaires. Certains les ont écrits, d'autres ont fait part de leurs commentaires et de leurs idées lors d'une conversation téléphonique. Dans les deux cas, nous avons pu poser des questions et obtenir des informations supplémentaires. Parfois, une mère et son fils lisaient ensemble un document, en discutaient et nous transmettaient leurs commentaires.

Nous avons aussi pu consulter des membres de notre public cible avec l'aide d'un intervenant. Cet intervenant demandait lui-même à quelques personnes autistes de lire le document et de le commenter. Il discutait ensuite du contenu avec les personnes consultées. Cette façon de faire a été particulièrement utile pour les sujets plus difficiles comme la déclaration de revenus.

En plus des commentaires recueillis, nous avons posé des questions précises. Les réponses nous ont fourni plus d'information et nous ont également aidés à bien cerner l'information manquante.

Comme nous ne pouvions pas supposer que notre public cible avait les connaissances de base sur les sujets abordés, chaque document devait être complet en lui-même. Par exemple, si nous écrivions sur le revenu, nous devions tout expliquer depuis le début : ce qu'est le revenu brut, ce qu'est le revenu net, etc. Cela peut sembler aller de soi, mais un nombre surprenant d'outils d'éducation financière ne sont pas complets et omettent des explications essentielles pour la compréhension de l'information.

Pour s'assurer que notre contenu était clair, complet et facile à utiliser, nous avons dû faire des allers-retours avec les membres du public cible, autant de fois que nécessaire, afin qu'ils puissent nous aider à déterminer si l'outil en cours d'élaboration répondait réellement à leurs besoins.

Les membres de notre public cible ont lu, commenté et posé des questions sur le contenu des documents. De notre côté, nous avons ajusté les documents et consulté encore et encore, jusqu'à satisfaction.

Consulter et travailler avec des membres de notre public cible a apporté de la profondeur à notre projet

Travailler avec des membres du public cible apporte bien plus que des commentaires sur le contenu. Cela nous aide à mieux comprendre leur réalité, leurs véritables besoins et leurs préférences. Autrement dit, travailler avec eux nous aide, nous, les rédacteurs, à comprendre et à prendre leurs perspectives.

Dans ce projet, parmi les autres avantages de travailler avec les membres du public cible, nous pouvons ajouter :

- La prise de conscience d'enjeux qui n'étaient pas apparus lors de l'évaluation des besoins
- Des suggestions d'illustrations
- Une compréhension plus approfondie de notre public cible et de ses besoins spécifiques concernant l'autisme et ses particularités

Ce processus s'étant déroulé sur plusieurs mois, nous avons pu adapter les documents en développement au fur et à mesure que nos connaissances et notre compréhension s'approfondissaient. Les ajustements ont porté non seulement sur le contenu, mais aussi sur la mise en page des documents. L'ensemble de ce processus a enrichi les 18 documents thématiques d'une manière incomparable.

Un travail d'équipe

Pour mener à bien ce projet, nous avons eu besoin de l'aide de personnes ayant des compétences différentes. Nous avons dû faire appel à des spécialistes de la gestion des finances personnelles, à une graphiste et à un réviseur linguistique. Ces personnes ont dû être renseignées sur l'autisme et les résultats de notre évaluation des besoins afin que nous ayons tous une compréhension commune de notre public cible. Il s'agissait d'un élément clé pour la réussite du processus.

À titre d'exemple, la collaboration avec la graphiste a été importante. L'idée n'était pas simplement d'avoir des documents esthétiquement agréables à consulter, mais d'appliquer les principes de design d'information issus du langage clair et simple. Les documents devaient être exempts de pollution visuelle et ne devaient pas être surchargés. Ils devaient aussi éviter toute distraction visuelle susceptible de nuire aux besoins spécifiques de notre public. Nous devions tous garder à l'esprit que les personnes autistes peuvent facilement perdre leur concentration en lisant.

En plus d'une bonne présentation visuelle, nous devions illustrer certains concepts et comportements liés à la gestion des finances personnelles.

Les illustrations sont un bon moyen d'appuyer et de renforcer certains aspects du contenu. Parce qu'elles ne sont pas réalistes comme les photos, les illustrations peuvent être utiles si elles ne montrent qu'une idée ou qu'un comportement, afin d'éviter les détails inutilement distrayants.

Nous avons eu la chance de connaître un jeune illustrateur qui est lui-même sur le spectre de l'autisme. Il a créé plusieurs illustrations, tout en nous donnant son avis sur le contenu. Il a pu apporter sa vision, sa compréhension, son expérience personnelle et un peu d'humour aux documents à travers son art. La collaboration de l'illustrateur a été un réel atout pour ce projet !

Dernières réflexions

L'adaptation d'information à un groupe spécifique est meilleure lorsque des membres du public cible sont impliqués le plus tôt possible dans le projet. En ce sens, leur implication va bien au-delà de simplement vérifier si un document plaît à la fin d'un projet.

En fait, il est nécessaire d'avoir l'esprit ouvert et d'être prêt à changer les plans, à réécrire certaines parties, à ajouter du nouveau contenu et à supprimer d'autres parties.

Le fait de consulter et de travailler avec des membres de notre public cible peut être considéré comme une sorte de garantie. En l'absence trop fréquente d'évaluation de projet, l'inclusion de membres de notre public cible devient une garantie que tout a été fait pour répondre réellement à leurs besoins spécifiques.

À vrai dire, les membres du public cible sont les experts ultimes de leurs besoins et de leurs désirs. Travailler sans eux lorsqu'on essaie d'adapter l'information serait comme demander à un tailleur de faire un costume parfaitement ajusté sans jamais rencontrer la personne qui le portera. Pour créer des documents sur mesure, il n'y a pas de meilleure approche qu'un processus en langage clair et simple.

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