

Our first two years: 2009-10

This report was published in April 2011.

It can be downloaded from:
www.simplificationcentre.org.uk
www.reading.ac.uk/simplification

Contact information can also be found on those websites.

What is simplification?

Simplification means taking complex information and making it clear and simple for everyone to understand. We get a constant stream of complex information to run our lives – if we can't understand it, we can't make the best choices or we may be unaware of things we are entitled to.

Ideally, simplification means making the content (the product, the system or the rules) simpler but often all we can do is to present it in a way that is easier to use and understand.

As a minimum, the language needs to be clear – simple structures and common words – plain English, in fact.

Effective design is important too, making structures visible so people can read selectively and strategically – finding the parts they really need, seeing the key choices, and feeling engaged and in control.

Only a small part of this can be captured in the form of guidelines, models and templates, and measured in tests – and we've been working on these things in the Simplification Centre. But they are not enough to improve documents on their own – writers and designers do that. We have put a great deal of effort into addressing three key qualities we believe writers and designers need when they work on complex communications for large organisations.

Firstly, they need skills that are underpinned by good conceptual models. Our training programme has developed an innovative curriculum, designed to provide this, and to give our students a sense of professional identity as document designers.

Good designers are as much informed by their empathy with users as with standards, templates and guidelines, however research-based these are. So we have recruited a user panel who can tell us what they think of organisations and documents.

Most important of all is an ambition to challenge and transform information, not just to optimise the words handed down from committees. So we have sought out opportunities for practical demonstrations of document transformation.

We especially thank our three foundation members, AXA, HMRC and DWP, for the additional financial support they have given our programme. They are all committed to clear communications through substantial internal programmes, supported by their Simplification Centre membership. We have benefitted not just from their financial contributions, but from their insight into the problems they face, their challenges and questions.

We are also grateful for startup funds from the University's Research Endowment Trust Fund.



Our first two years

The Simplification Centre was set up in late 2008, and this report covers our activities for our first two full years, 2009 and 2010.

The Centre was launched as one of the University of Reading's strategic research priorities, based in the Department of Typography & Graphic Communication, a leading centre for research and teaching. We benefited from startup funding from the university, and we have raised further funds through consultancy services, training and through a membership scheme. We were very grateful for financial support from the following organisations:

- HM Revenue & Customs
- AXA UK
- Aegon UK
- Department for Work & Pensions.
- National Offender Management Service (NOMS),
- The Welsh Assembly Government.

We've approached the issue of simplification from the viewpoints of both producers and users, and tried to look at root causes as well as the surface. So here we report on the different ways in which we've engaged with the organisations who communicate to the public, as well as research with users of information.

A note about our future

From 1 April 2011 the Centre moved out of the University of Reading, re-establishing itself as a not-for-profit organisation dedicated to advocacy, innovative co-designing, and developing skills. The research programme remains at Reading, under the direction of Professor Sue Walker, as part of a new Centre for Information Design Research. The programme for the Simplification Centre's next phase will develop during the first half of 2011, with new structures, activities and alliances still to be announced.

Benchmarking: comparing documents from different organisations

One of the key services we have offered our member organisations is a document appraisal service. It took a benchmarking approach, scoring documents against what we believe is best practice. Making this one of our first activities ensured that we had a good understanding of the issues our member organisations face, and that they had access to our advice from the start.

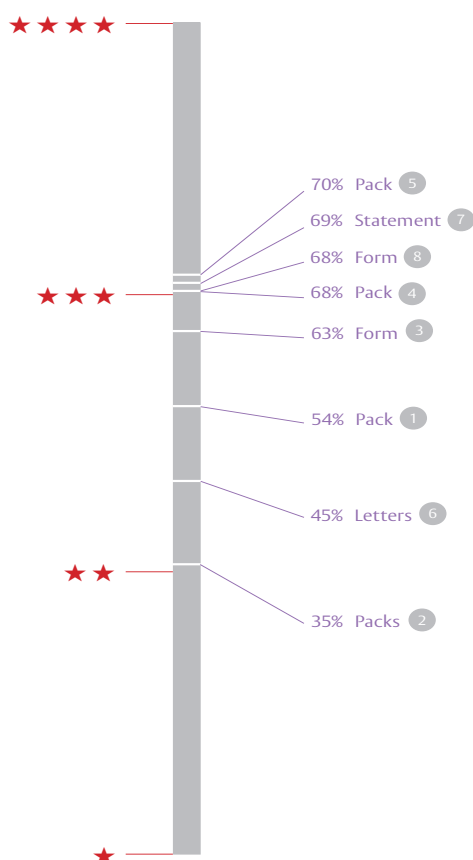
We covered a wide range of issues that are known to contribute to difficulty – ‘known’, that is, from published research, from unpublished research we have seen, or our professional experience. Our evaluation was based on a simple model of the reading process that customers are likely to use: from first glance, through detailed reading and decision-making to taking action. And we also took note of where the document sits in a wider process – the customer journey.



Members received a report that lists a range of specific issues they can address to improve the document, with detailed comments on key problems we find, which we presented in a face to face meeting. This meeting was particularly valuable, as in most cases a wider team was invited – helping to spread the message of simplification.

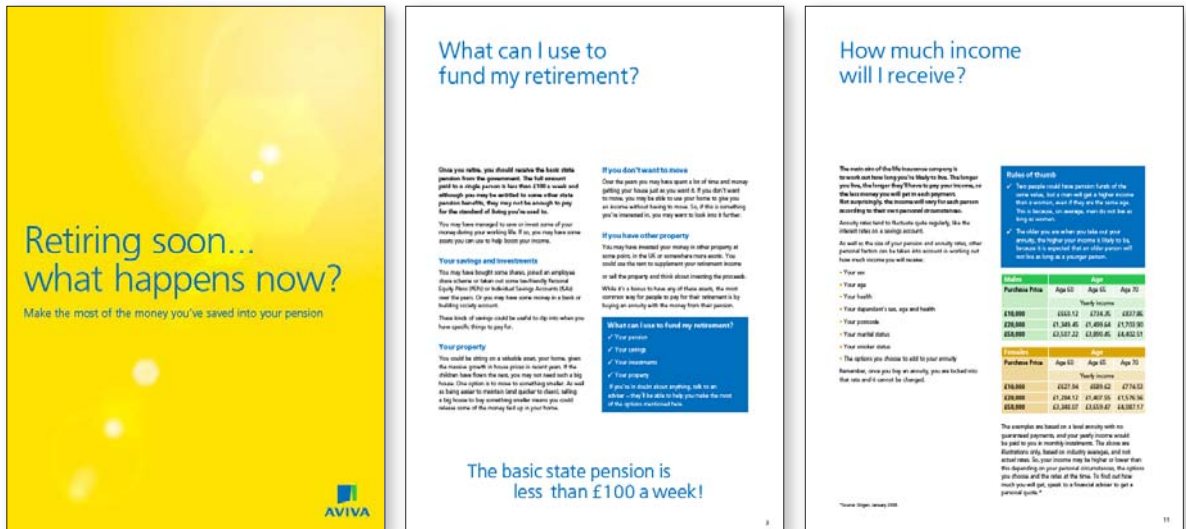
The diagram on the left aggregates the scores from eight reports we have produced. Members used the service in different ways – for example, the lowest score represents a document that the organisation knew is poor, so they could use our report to think through ways to improve it. The highest scoring documents had all been improved, and were much better than their old versions. Our reports confirmed this, and also pointed to further improvements that could be made.

We have produced three technical papers about our document benchmarking service, the criteria we use, and schemes operated by other organisations (Technical papers 2, 5 and 8).



Regional seminars and design clinics

During 2009 we ran four document design seminars, in Leeds, Cardiff, Reading and Edinburgh. They were attended by a range of organisations including DVLA, DWP, Companies House, Britannia, Santander Credit Cards, Alliance & Leicester, Aviva, Aegon, Standard Life, Kent Reliance and several smaller building societies. The seminars included a document design clinic in which attendees brought documents with them for expert appraisal.



The design team from Aviva brought this pensions booklet, which we thought was exemplary in its pacing and organisation. Not every document was up to this standard!

People coming to the seminars were from a range of roles – they included marketing people, in-house designers, customer services, and compliance specialists. They also differed in seniority. This range led to lively discussions of the constraints they were all working to, and the standard of documents they brought varied considerably – it was useful for us to have good examples to praise and explain, as well as problems to diagnose.

“A really useful, informal session. It was an opportunity to bring along problem documents and new concepts and get an expert’s point of view. It was great to meet other members / prospective members and chat through common themes and current trends.”

“Thank you for inviting [us] to the simplification seminar in Edinburgh recently. We found it incredibly beneficial. We’re now about to write a report about the benefits of joining the centre.”



Consultancy

Consultancy projects enabled us to contribute directly to projects within member organisations, and to raise funds for the Centre.

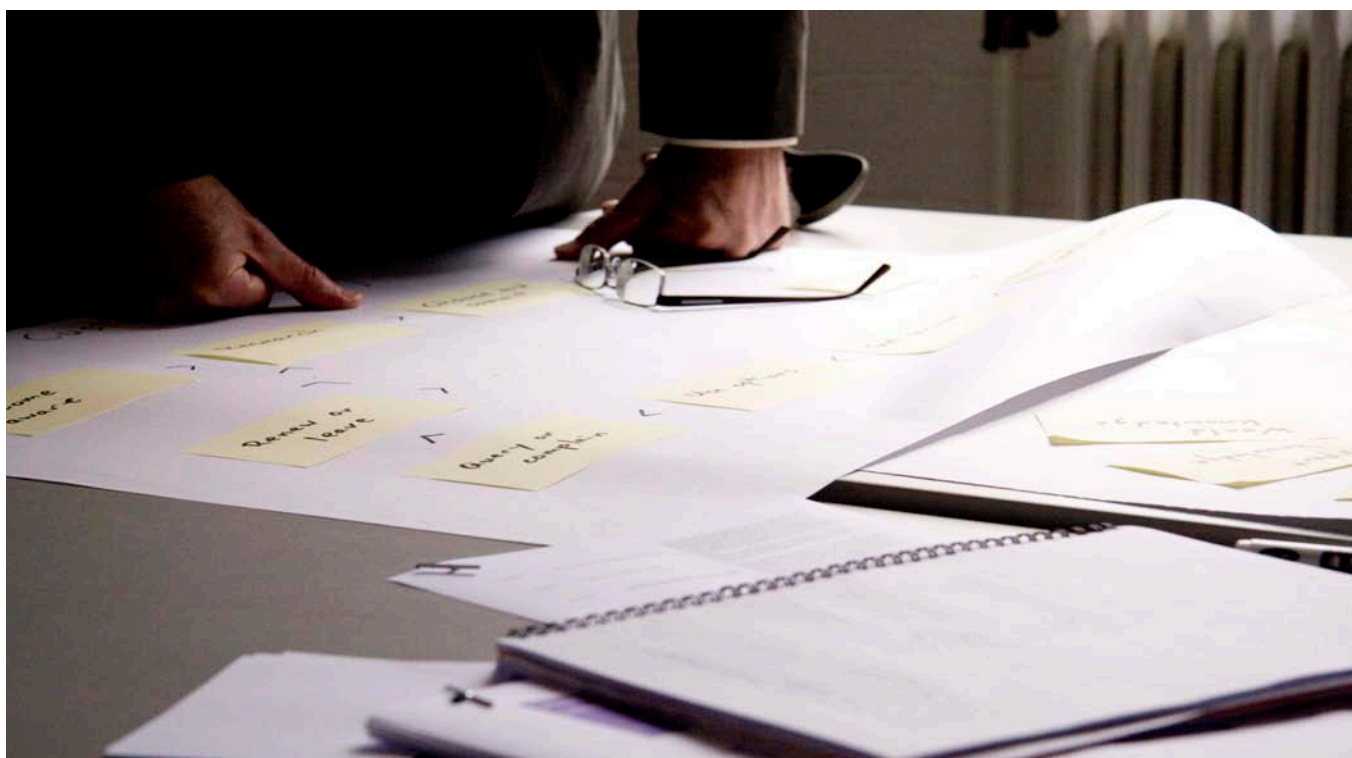
HM Revenue & Customs

A major project for HM Revenue & Customs reviewed the information architecture of their online content about VAT, and the problems associated with parallel publishing on paper and online. We compared the order in which content is presented with the order in which it is actually needed by its users and proposed new structures to align it more effectively.

We were also involved with another key project at HMRC to diagnose the cause of errors in forms, and to determine which could be put right through clearer writing and design.

Department for Work & Pensions

We supported the Department for Work & Pensions on the language and design of letters. DWP sends around 160 million letters to customers each year, and any problems with them lead to needless phone calls, or office visits. We helped a DWP team develop clearer formats, structures and wording for letters about Job Seeker's Allowance and Pensions Credit, which following user testing are now acting as model documents for a wider change programme. We have reported this work in Technical paper 11.



National Offender Management Service

Spoken information can be as important as written information, and many encounters between organisations and users take place face to face. Together with the consultancy Text Matters, we worked with the National Offender Management Service to develop structured communications tools that will help both staff and prisoners to communicate consistently. They include checklists, the SBAR tool adapted from the NHS and the emergency services (it stands for Situation, Background, Assessment, Recommendation, and ensures that reports and requests are framed in a reliable way), and an innovative tool named Recode to help ensure conversations among staff and between prisoners and staff are effective.

PA Consulting

We ran a workshop with PA Consulting on user needs for smart meters, reviewing the research literature on behavioural change, and on the effects of alternative information formats.

Policy consultations

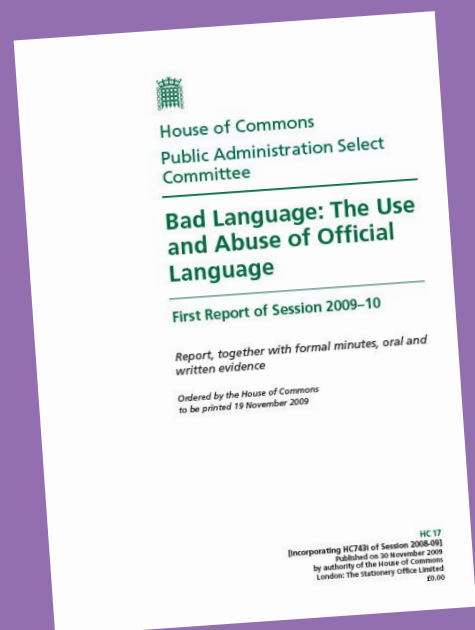
We have responded to a number of public consultations about clear communications, including the consultation on EU proposals for a consumer rights directive by the Department for Business Enterprise and Regulatory Reform. We also commented on Ofgem's consultation on energy billing. In both cases our concern was that the focus should be on the quality of information presentation, as well as the provision of extra information, and we suggested that user-testing should be built into their recommendations.

The House of Commons Public Administration Select Committee published a report on official language in November. Their report quotes our concern for counting the cost of errors, and the government's response to the report highlighted the work the Simplification Centre is doing with HM Revenue & Customs and the Department for Work & Pensions.

"Clearer and more user-friendly forms also mean government bodies can avoid the cost and inconvenience of having to go back to people if information provided is incomplete, a point made by the University of Reading's Simplification Centre:

'...error-prone forms have to be returned and corrected, and needless enquiries are made to government helplines. These costs are rarely addressed in reviews of potential savings, but we believe they are considerable.'"

House of Commons Public Administration Select Committee, *Bad Language: The Use and Abuse of Official Language*. First Report of Session 2009–10, 19 November 2009



Training and design education

During this time we developed the university's new Certificate of Higher Education in Information Design.

We have seen education and training as a key part of our mission – most poor communications result from organisational problems rather than the lack of known solutions, or research data about users. The Cert HE programme is intended not only to give designers and writers better skills, but also to help them argue for their solutions within their organisations. So we're not afraid of introducing theoretical concepts at an early stage in a simplified, practically-focused way.

Many organisations already have a programme of plain English training, helping people to write clearer sentences, and eliminate jargon – the Cert HE programme does not compete with these, but builds on them to give students a wider set of tools and concepts, including usability, graphic design, and organisational issues.

There are 20 modules (of 10 or 20 credits), which fall into three areas: writing, design and communications management – this means that students can specialise and develop specific skills by choosing particular sets of modules. Each module involves pre-reading, attendance at a one- or two-day course, and a tutored assignment.

A Cert HE is the equivalent of a first year university course – it is a recognised qualification (students graduate at the main university graduation ceremony, and receive a certificate), and it is possible to transfer the credit to the Open University to build into a BA.



Three of the first graduates from the Certificate of Higher Education in Information Design, December 2010: Mark Ritchie, Anita Nair, Preneeta Mann.



Thanks to all the people who have contributed to the delivery and assessment of this programme over its first two years:

- Jenny Waller
- Martin Evans
- Rob Waller
- Judy Delin
- David Woodward
- Jeanne-Louise Moys
- Bethany Shepherd
- Paul Luna
- Mary Dyson
- Mark Stanton
- Myra Thiessen

We would also like to thank Professor Clive Richards, our external assessor. And the programme would not have started without the enthusiasm and support of Gavin Jefferies and John Willmer of HM Revenue & Customs, who championed the programme and encouraged and funded their staff to take part.

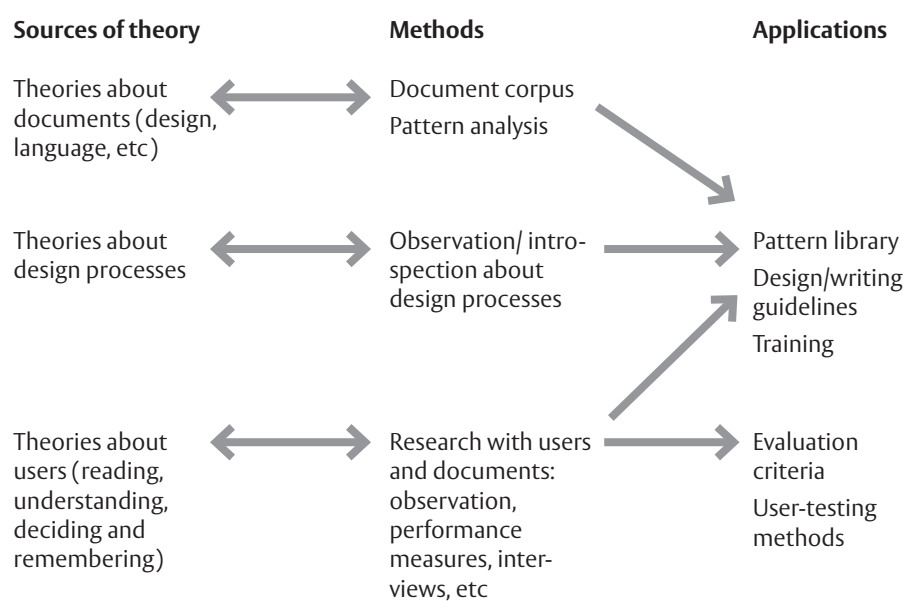
The programme has been piloted by a group of 19 students from HM Revenue & Customs, and another 20 people from various organisations have attended individual courses. We were proud to see our first graduates in December 2010. Technical paper 12 describes how this programme fits into a professionalisation agenda for functional communicators who work in large organisations.

Compulsory modules	Optional modules
Introduction to simplification	Simplifying complex documents
Introduction to clear writing	Clear writing for online information
Introduction to graphic information design	Writing for different audiences
Introduction to usability	Working with legal language
Designing the customer journey	Introduction to personalised dynamic documents
	Forms design
	Advanced typographic techniques
	Designing for multiple channels
	Creating inclusive documents
	Images, diagrams and data visualisation
	Managing information design projects
	Briefing for and interpreting customer research
	Measurement, testing and quality control
	Simplification and the organisation
	Report writing

Research

During our first two years we have built an infrastructure for research, including our research panel of local people, our document corpus, and the appointment of a postdoctoral research assistant (Dr Karen Stanbridge). The research programme will continue at the University of Reading under the direction, initially, of Professor Sue Walker.

Our approach to research



Our activities and methods aim to link the worlds of theory and of practice. So we have looked at formal (the document corpus) and less formal (design patterns) ways to analyse documents, and have set up a user panel to study documents in use. We have also been drawing up plans to look at design methods through co-designing: involving users not just to test the outcomes of design, but to participate in the process along with designers and their clients.

Research panel

Our research panel consists of people who volunteer to take part in occasional experimental studies or document tests. Our first set were recruited at a public lecture, and we added to this group through publicity in the local media, and through contact with local adult literacy classes (we are very grateful to New Directions in Reading for their support). Karen Stanbridge has been running a document diary study and a series of groups sessions observing how insurance documents are used. This work informs the criteria we use for

Members of our research panel kept a document diary for a month, recording their reactions to everyday documents they received in the mail.



document benchmarking, and our understanding of how design affects the way people read. This work is reported in Technical paper 7. The panel have also participated in Jeanne-Louise Moys's PhD research into the perception of mood and voice in typography.

A multi-modal corpus

Martin Thomas worked with us in 2009 to develop a multi-modal corpus (see the panel for more about what this means), with Judy Delin. The corpus has been populated so far with a small number of financial documents, and there is the potential to build this into a large enough collection for the detailed study of genres such as financial services documents, or government forms and guidance.

This work was presented at a recent international conference on Multidisciplinary Approaches to Discourse in Toulouse (Thomas, Delin & Waller 2010) and is described in our Technical paper 3.

Multidisciplinary working, and the LUCID network

We've discussed or planned joint research activities with a range of other disciplines in the university, including Applied Linguistics, Psychology, Law, Applied Mathematics, Systems Engineering, Construction Management, and Meteorology.

Rob Waller has also given talks in other departments and to specialist groups at other universities – the Digital World Research Centre at Surrey, and the Literacy Research Centre at Lancaster.

We were successful in winning a £30,000 bid for an academic network funded by the Arts & Humanities Research Council (led by Sue Walker and Mary Dyson). The network, known as LUCID (Learning, Understanding and Communicating about Information Design) brings together researchers in graphic design, language and digital communications from a range of other universities in the UK, the Netherlands and Brazil for meetings to discuss collaborative working. During the year we ran two workshops to develop research themes and a postgraduate event. There is more information about LUCID at <http://lucidity.ning.com/>.

Research students

We are funding a Simplification Centre studentship, which was awarded to Jeanne-Louise Moys. She is studying the affective impact of typography – an important topic that will help us understand the significance that readers see in different type variants such as seriffed or sans-serif, italic and bold, particular type styles, and in particular configurations and layouts. Do readers see typographic variation in the way that designers intend (for example, as speaking in different voices, or with a different level of emphasis)? What happens when these distinctions are lost (for example, in large print editions or online versions)? Jeanne-Louise’s work to date is reported in Technical paper 6.

Sarah Owens is another PhD student in the Typography Department whose work is highly relevant to the Simplification Centre. She is studying the differences between lay (that is, amateur or untrained) designers and experts. When we communicate about design ideas, her work will help us understand the terminology that makes sense to non-designers, and misunderstandings that may need to be addressed.

Communicating what we do

Public lectures and conference presentations

We have presented our work at a number of public lectures and conferences:

Jeanne-Louise Moys, 'Typographic voices', ATypI, Dublin,
10 September 2010.

Jeanne-Louise Moys, 'Typographic meaning', CPH:TYPO*11, Copenhagen,
9 March 2011.

Karen Stanbridge, 'Review of research into behavioural change and energy use', presentation to PA Consulting, June 2010.

Karen Stanbridge, 'Users and their everyday documents' presentation to LUCID symposium, Royal College of Art, 28 September 2010.

Martin Thomas, Judy Delin & Rob Waller, 'A framework for corpus-based analysis of the graphic signalling of discourse structure' Multidisciplinary Approaches to Discourse, Moissac, France, 17-20 March 2010.

Rob Waller, 'Simplification: what is gained and what is lost', Applications of Information Design, Mälardalen, Sweden, June 2008.

Rob Waller. 'Pattern languages for information design', Information Design Conference, Greenwich, April 2009.

Rob Waller, 'Beyond plain English: why *they* find so hard to communicate with *us*', Public lecture, University of Reading, December 2009.

Rob Waller, 'Transformative information design', public lecture series, Ljubljana Museum of Architecture, February 2010.

Rob Waller & Judy Delin 'Towards a pattern language approach to document description', Multidisciplinary Approaches to Discourse, Moissac, France, 17-20 March 2010.

Rob Waller, 'Graphic literacy', presentation to LUCID symposium, University of Reading, 24 March 2010.

Rob Waller, 'Graphic literacies for a networked society: the survival of layout', COST Exploratory Workshop on Knowledge Management in Contemporary Europe, Brussels, May 2010.

Rob Waller 'The graphic dimension of text', COST/European Science Foundation International Workshop on Electronic Textuality, Istanbul, 16 June 2010.

Rob Waller 'Are we communicating clearly yet?', Financial Services Forum: Are we treating customers fairly yet?, London, 24 June 2010.

Rob Waller, 'Perspectives on information design' Design of Understanding, St Brides Institute, London, January 2011.



Simplification Centre technical papers




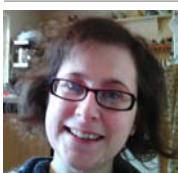



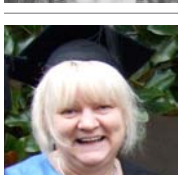
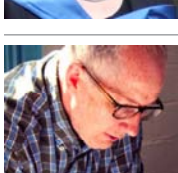
We are publishing a series of technical papers, covering our different activities. They vary widely in style, content and purpose, and include conference paper, guidelines, manifestos and reports.

These reports are available from:

- The Simplification Centre: www.simplificationcentre.org.uk
- The University of Reading: www.reading.ac.uk/typography

1	Simplification: what is gained and what is lost	<i>Rob Waller</i>	A conference paper surveying a range of ways in which documents can be simplified, with guidelines and examples.
2	Criteria for evaluating documents	<i>Rob Waller</i>	A report written for a general audience, explaining the research background to our evaluation criteria.
3	A framework for corpus-based analysis of the graphic signalling of discourse structure	<i>Martin Thomas, Judy Delin & Rob Waller</i>	A conference paper, reporting on the building of a document corpus – a tagged database that can be used to study document design systematically. (Assumes some knowledge of applied linguistics).
4	Towards a pattern language approach to document description	<i>Rob Waller & Judy Delin</i>	A conference paper on design theory, based on Christopher Alexander’s pattern language approach – identifies and names common design solutions..
5	Benchmarking everyday documents	<i>Martin Evans</i>	A report of our benchmarking evaluations for member organisations.
6	Typographic voice: researching readers’ interpretations	<i>Jeanne-Louise Moys</i>	A research report of a study of what people notice in typographic design, and how it affects their perception of tone of voice, purpose and audience.
7	What do people notice about their documents?	<i>Karen Stanbridge</i>	A report of a document diary study, showing what people think about the documents they receive in the mail.
8	Criteria for clear documents: a survey	<i>Martin Evans</i>	A report comparing the criteria used to evaluate documents, from a range of organisations including our own.
9	Choosing a typeface	<i>Rob Waller</i>	Basic guidelines on typeface choice, answering questions we are sometimes asked.
10	Type size: interpreting the Clear Print standard	<i>Rob Waller</i>	A commentary piece, initiating a debate about the Clear Print standard.
11	Improved letters about benefits	<i>Rob Waller</i>	A case study of document improvement.
12	Professionalising functional communications: what professionals need to know	<i>Jenny Waller</i>	An account of our design training programme, in the context of the need for professionalisation among document designers.
13	Inspection reports: could they be clearer?	<i>Martin Evans</i>	A critique of inspection reports on public services, including those the public rely on to choose schools and care homes.
14	Information design: how the disciplines work together	<i>Rob Waller</i>	An unpublished conference paper from 1995 made available as a contribution to our discussions of the information design curriculum.

Simplification Centre people

	Judy Delin	Judy was part-time Professor of Language & Communication up to December 2010, and running her own consultancy on branded language and clear communications. An expert on multi-modal linguistics, she has supervised the development of our document corpus.
	Mary Dyson	Mary is a psychologist specialising in user-testing and research methods for information design. Her research interests include reading from screens, and design for strategic reading, and she is co-organiser of our AHRC-funded LUCID research network.
	Martin Evans	After a career as a senior civil servant, Martin did an MA in Information Design at Reading. As Information Manager he has run our benchmarking programme, responsible for liaison with member organisations.
	Emma Minns	Emma is a research assistant providing support to the Centre, as well as working on an AHRC-funded research project on the history of the Isotype Institute (pioneers of twentieth-century information design).
	Jeanne-Louise Moys	Jeanne-Louise is a postgraduate student, holding a Simplification Centre studentship. With a background in design practice and education, she is an active member of our research community, studying the perception of personality in typography.
	Karen Stanbridge	Karen is an environmental psychologist who joined the Centre in 2009 to run our programme of regular user studies, and manage our participant panel.
	Sue Walker	Dean of the Faculty of Arts & Humanities, and Professor of Typography, Sue has combined practical experience in information design consultancy with her career in research, teaching and academic leadership. She leads the LUCID research network based in the Centre, funded by the Arts & Humanities Research Council.
	Jenny Waller	Jenny is an information writer and educator, who has worked extensively in industry, managing change communications programmes. She developed our programme of education and training.
	Rob Waller	Director of the Simplification Centre, and Professor of Information Design. Rob came to Reading after working in both academic research and design consultancy. He has developed clear information design for many well known names in financial services, energy, government and other sectors.