Preparing Simplified Training Materials

by

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The guide contains all of the text and illustrations of the original. The guide has been retyped, reformatted and saved in pdf format to minimize the file size for downloading.

Page numbering may be different from the original. Extra footnotes [in square brackets] provide updates in some areas. Some minor editing has also been done for this edition.

Most of the ideas in the document remain valid today. However, the bibliography has not been updated. Use the bibliography as a guide for searching the web. Or check your local library for current resources.
Acknowledgments

The author gratefully acknowledges the assistance of many communication specialists and educators in the preparation of this guide. The preparation of any training material is a team effort and I have adapted ideas and suggestions from many sources. I am most grateful to these unseen members of the 'team' that prepared this guide.


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Introduction

The preparation of this booklet started in Sri Lanka in 1975, and has evolved through my work with development projects. Many of these projects involved preparing printed materials. Our audiences were often semi-literate or illiterate. Our goal was to prepare materials that would be effective in communicating a development message.

As we worked I have acquired better skills to achieve the goal of effective communication. This booklet is an attempt to summarize those skills and techniques. I hope that the development communicators can use the techniques in this booklet to develop more effective printed materials.

This booklet is written in simplified English. Simplified English is good for readers who have learned English as a second language. Simplified English is good for written materials that will be translated into another language.

Good luck in your work.

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1 Introduction to the 1982 edition. Notes on changes are on the cover page. Textual changes are generally in the form of footnotes [in square brackets].
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TEXT

Preparing Clear Written Text

We prepare written materials to help people understand. Some people read better than other people. Good readers can understand most written materials. Poor readers often do not understand written materials.

We must prepare our written materials in a clear and simple style. Clear, simple written materials can be understood by most readers. The following rules will help you to write in a clear and simple style. These rules were written for persons who are writing in English. These rules also seem to work for persons who are writing in other languages.2

- Use short sentences. Many readers can understand all of the words in a sentence. The individual words combine in a sentence to make more complicated meanings. Many readers will lose the meaning of a long sentence.
- Put each idea in one simple sentence. Many sentences contain more than one idea. These ideas are connected with words like and, but, and while. Break long sentences into several short sentences. Each short sentence should contain one idea.
- Use simple familiar words. Define a word the first time that it is used. Use the new word in context several times. The reader must become familiar with the use of the new word.
- Use the same word each time. Many words have a similar meaning. Choose the most common word and use it every time. For example, dwelling and house are words which mean the same thing. House would be the best word to use.
- Use precise words. Do not use words that have several meanings. For example, say "grind the wheat" instead of "make flour".

2 These rules were simplified and condensed from an article by Felicity Savage and Peter Godwin. The article is Controlling Your Language: Making English Clear. The article was published in Vol. 75, No. 4, 1978 of The Transactions of the Royal Society of Tropical Medicine and Hygiene.

- Make positive sentences. Positive sentences are easier to understand than sentences which use do not, cannot, or unless.
- Make active sentences. Active sentences tell the reader what to do. "Feed the child fish" is better than "the child should be fed fish".
- Use the personal and imperative form. Do not say "The villagers should be asked about the water". Say "Ask the villagers about the water".
- Use few pronouns. The reader often has problems understanding what it, her, them and other pronouns mean. Use "The mother should wash her hands". Do not use "She should wash her hands".
- Repeat words if necessary. It is better to repeat "Mothers should....." several times instead of saying "They should......".
- Keep comparisons simple. Whenever possible be specific. Do not say "The wot should be fairly bland". Say "Cook a plain wot. Do not use peppers or other spices."
- Put in the connecting words who, which and that. This sentence can be unclear. "This is a condition found in babies born in rural areas". Put in the connecting words and make the sentence clearer. "This is a condition which is found in babies who are born in rural areas".
- Avoid difficult and confusing constructions.
- Use simple tenses. When possible use the simple past or present.
- Explain things in a clear, logical order, and in time sequence. Start at the beginning. Explain things step by step. End at the end. Do not distract the reader with information that is not important to the task.
- Write about things that happen to your readers in real terms. An abstract idea can be confusing. "The skin grows to cover over gaps made by cuts". It is clearer and more real to say "Your skin can grow to close a cut".

3 Wot is the Ethiopian word for curry or stew.
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- **Break up the text by any means you can think of.** Remember the appearance of the page. Make paragraphs short. Put things in lists. Use white space and illustrations to make the page more interesting.

The meaning of symbols must be learned. Symbols common to the city may not be common to rural areas.

Use a normal view of common objects.

### ILLUSTRATIONS

#### Preparing Understandable illustrations

An illustration is a visual aid that helps the reader to understand written material. An illustration can be a photograph, an artist's drawing, a diagram or a map.

Literacy is the ability to understand written material. A person who is literate can read and understand written materials. Visual literacy is the ability to understand illustrations. A person who is visually literate is a person who has had experience in seeing and understanding illustrations.

Illustrations are limited by the quality or paper and printing processes available. A good photograph cannot be printed on poor quality or rough paper. A good photograph cannot be printed with a stencil duplicator. A photograph will look good when it is printed with a quality printing process on expensive glossy paper.

A number of researchers have studied the use of illustrations with literate and semi-literate viewers. They have studied the use of illustrations in Africa, Asia and South America. These researchers have developed some general rules for preparing effective illustrations.

- **Use illustrations and words together** for good understanding. The illustration helps the reader to understand the text. The text identifies and supports the illustration.
- **Use illustrations to motivate people and to remind** them about your message.
- **Written materials are aimed at literate people** (extension workers, school children, etc.). Use illustrations in pamphlets and handbooks for these literate people. The illustrations will help the literate worker to understand your message. The illustrations will also help when the literate person tries to explain your message to other people.
- **You should discuss the illustrations and message with many people.** Field workers must be sure that the illustrations are recognized and understood. Learning to understand illustrations is just as difficult as learning to read. If an illustration is not understood it will only be a distraction.

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4. These rules are the result of many people's work. *Communicating With Pictures in Nepal* is the 1976 report of a joint UNICEF and NDS study in Nepal. A summary of research from around the world is in that study. This list was primarily prepared from that study.
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- **Explain all symbols.** We must learn the meaning of all symbols. Be consistent in using symbols. Use only common symbols.

- **Posters and wall charts must explain the message in words as well as illustrations.** The words must be large enough, few enough, and simple enough to be understood by children. Children often read better than adults. The children can explain the poster's message to adults who cannot read.

Sequences of illustrations must be numbered.

- **Use one illustration for one idea.** Do not include a number of objects or several steps in a process in one illustration.

- **Use numbers to show the order of viewing.** If a poster or wall chart shows a series of illustrations then each illustration must be numbered to show the order of viewing. Use one illustration or frame for each step or idea.

- **Illustrations must be as realistic as possible.** Do not include background detail. Use block-out photographs or shaded drawing for all materials that will be widely distributed. A shaded drawing is [often] better than a poorly printed photograph.

- **Use illustrations that show people, objects and actions like those in the area where the illustration will be used.** Local styles of dress are very important. Use a normal view for showing objects, people and actions. Illustrations are often taken very literally. Sectional views and enlarged views are

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5 The Nepal project prepared large wall charts for country-wide use. The project also prepared smaller posters for use in local areas. The small posters showed people in local dress using local foods, etc.

[See poster, page 8. LZ 2008]
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usually confusing. Isolated parts or bodies cut off at the waist should not be used.

• **Use realistic colours when colour is necessary.** Colour can be misleading and expensive.

• **Test each illustration in a field situation.** You should never assume that people will understand your illustration. The test audience will often make suggestions for improving the illustration.

• **Prepare all illustrations and explanatory text so that they can be enlarged or reduced for use in another format.** For example, it should be possible to reduce a poster for use in a handout or leaflet. The size of lettering, line weights, and style of illustration should all be selected to allow the finished message to be enlarged or reduced.

**Summary:** An illustration will often have several audiences. Include words with the illustration to explain your message. A shaded line drawing is often the best type of illustration for use with poor quality paper and local printing processes. Every illustration must be tested for understanding before use.

**PRE-TESTING**

Pre-Testing Materials

You are preparing materials to communicate a message. You want your audience to understand the message. You cannot assume that your audience will understand the message. You should always pre-test both illustrations and text before duplicating or printing materials.

**You should pre-test materials with a number of people who are typical members of your intended audience.**

First, you must decide exactly who are the members of your intended audience. You must know their interests, customs and abilities. **Exactly who is it that you want to receive your message?**

Second, you must decide exactly what message you want to communicate. **What do you want your audience to do after seeing your materials?**

Third, select a sample group from your intended audience and test their understanding of your message. **What are the differences between your intended message and the message understood by the sample group?**

You should be willing to change your materials if the test audience cannot understand your message. Revise the materials. Re-test the materials with another sample from your intended audience. Repeat the revision and re-test procedures until the message is clearly understood.

**Remember that you are testing your message. You are not testing the members of the sample audience.** They are helping you to improve your materials. Help your sample audience to relax, explain why you are asking their help. You should explain that they are not being tested, and that they are not at fault if the materials are not clear.

**Testing Visuals:** Prepare the photographs or drawing on post-card sized pieces of cardstock (or photographic paper). Show the illustrations to individual members of your sample audience. Ask them questions such as

- **What is happening here?**
- **Tell me a story about what you see here.**

Keep a record of the responses for each visual. You can also ask **What is wrong with this illustration?** The answers to this question will help you to improve the illustration.

**Testing Instructions:** Instructions are a special form of text. Instructions tell us how to do something. Illustrations are often used to help explain how to do the activity.

**Instructions can only be tested by asking someone to use the instructions to do the activity.**

Prepare the instructions (text and illustrations). Assemble the required materials to do the activity being described.

Give the instructions to a member of the sample audience. Ask this person to read your instructions and carry out the task described. Observe what happens. Do not give any other hints about the task or how it should be done.

- **Did the required task get completed?**
- **Did the person use your instructions?**
- **What problems occurred?**

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* Colours have different meanings in different societies. An illustration with the wrong colour can easily offend some people in your audience.
You may need to stop the pre-test if the instructions cannot be followed. Follow-up by asking Where did you find my instructions difficult?

**Testing Text:** Prepare the text in typewritten or ‘proof’ print form. Ask an individual member of the sample audience to read the selection from the text material. Give him enough time to read the selection and collect back the test materials.

The simplest test for understanding is to ask the subject to explain the message in his own words.

- Can he explain the message intended in the text?
- Can he answer questions about the text?
- What words caused problems?

There are a variety of other tests to determine if the audience can read the materials. The Cloze\(^7\) test is one example of a test for readability.

**The Sample Audience:** A small sample audience is enough for most testing. If the first two or three people from your sample audience cannot understand the message you must revise the materials.

It is good to use a sample audience of at least thirty people. These people do not need to be in one place at the same time. Most testing should be done with individuals. It is not good for one person too see or hear the answers that are given by another person.

A sample should consist of people who are exactly like the intended audience. Materials for a field worker with a Grade 9 education must be tested with field workers with a Grade 9 education. Materials for a rural audience must be pre-tested with a rural sample. You should also test your materials with school children when your audience is newly literate or illiterate.

**Summary:** All materials must be pre-tested before distribution. The materials must be tested with people who are typical members of the intended audience. You must be willing to change your materials if they cannot be understood by the sample audience.

Pre-testing materials does not need to be difficult or expensive. Even a sample smaller than 30 will usually discover difficulties with your materials. It is good if every member of the sample can understand your message.

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**POSTERS**

**Posters and Wall Charts**

Posters are large and eye-catching. Posters have one simple message that attracts attention. Posters can usually be understood from a distance and they have few words. Posters are used to motivate people and to remind them about your message.

Posters are short-term message reminders. In uncontrolled situations, where posters are displayed on walls or fences, one-half of your posters will probably have disappeared in one week.

A person will look at a poster for the first or second time that he sees the poster. After the second viewing most people will ignore a poster.

Posters in controlled situations such as health clinics or schools will often remain on the wall for ten years or more. These posters lost their effectiveness after a few weeks and are only decorative.

Wall charts are teaching aids. Wall charts help a teacher to explain a message. A teacher is necessary to use a wall chart because a wall chart is not self-explanatory.

Wall charts should never be left on the wall. Wall charts should be used as part of a teaching lesson. After the class they should be carefully put away in a clean place. Wall charts can be used for many years if the message in your teaching lesson stays the same.

**Size:** The size of a poster will vary depending upon the place where it will be displayed. A billboard (hoarding) and a sign on a building are both posters. They must attract attention from a long distance and are very large.

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\(^7\) [Readability was an additional topic in the 1980s workshops where this document was originally used. Details of the Cloze, Flesch and other readability tests can be found on the web. The on-line encyclopedia Wikipedia is a good place to start (www.wikipedia.org). LZ 2008]
Show familiar people doing familiar activities dressed in a familiar costume.

It is important to use a large size type for posters.
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60, 48 pt

24, 14 pt Helvetica bold

The text in this document is set in 12 pt Times. This is 11 pt Times. This is 9 pt Times.

Sample type sizes

A poster that will be viewed from 2 to 3 meters away will usually be A1 size (594 mm x 840 mm) or A2 size (420 mm x 594 mm). A poster in a quiet area where the viewer can stop and get close to the poster can be as small as A4 size (210 mm x 297 mm). A display advertisement in a magazine is also a form of poster, and can be much smaller.

<table>
<thead>
<tr>
<th>Table I</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Type Sizes for Charts &amp; Posters</td>
</tr>
<tr>
<td>ISI</td>
</tr>
<tr>
<td>A1</td>
</tr>
<tr>
<td>A2</td>
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<tr>
<td>A3</td>
</tr>
<tr>
<td>A4</td>
</tr>
<tr>
<td>A5</td>
</tr>
</tbody>
</table>

A good poster or chart will be easily readable from a distance of 10 times its height.

The size of a wall chart will also depend on the intended use. A complicated chart or diagram to be used in a classroom may need to be 2 meters by 2.8 meters or larger. A simple illustration for the same classroom could be as small as A1 size. A wall chart that is A1 or A2 size is good for teaching a small group (3-6 people) in a clinic or a home.

It is useful if wall charts and posters are also prepared in a smaller size for use as classroom handouts. A4 size is good for handouts. The well designed poster or wall chart can be reduced for use on a handout.

Prepare illustrations so that they can be reduced or enlarged to fit other sizes.

Materials: A poster that is to be glued to a wall can be printed on light-weight paper. A poster that will be pinned, nailed, or taped to a wall must be on heavy paper. A poster that will be self-supporting must be printed on wood or metal sheets and fixed in a frame. Posters that will be outdoors must be weather-proof.

Wall charts are expensive to produce. A wall chart should be printed on heavy cloth, oil cloth, or on paper fixed to cloth. These large wall charts should have a hanging rod fixed to the top and the bottom of the chart.

Field workers will not like to carry bulky or heavy wall charts. Wall charts for field workers must be easily carried. Smaller charts that are to be used often must be printed on strong heavy paper or card-stock. A chart that is printed on heavy A4 card-stock can be easily carried and can be passed around for viewing.

Content: Each poster or wall chart should have one idea or message. Keep the message simple. Illustrations should be simple and eye-catching. Colour is usually not necessary for

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8 [pt is the abbreviation for point. Point is a common designation for type size. LZ 2008]

9 [Self-supporting stands are available for posters and banners. Some stands can be reused with other posters. Some stands can only be used with a single poster. LZ 2008]

10 [Most posters and wall charts are computer generated and printed. Up to 10 or so posters can be printed on waterproof plastic media quite economically. LZ 2008]

11 [Today a wall chart is likely to be printed on plastic or cloth media. LX 2008]
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Wall charts. Colour is good to attract attention on posters.\(^2\)

Wall charts or other illustrations that need to be viewed in a particular order must be numbered. Wall charts should be designed so that the message is clear. Use words on the wall chart to explain the message. Wall charts and posters should be understandable when viewed from a distance of ten times the height of the wall chart or poster.

**Summary:** Wall charts and posters should be simple and eye-catching. Many people will use posters and wall charts as decoration in a room. The message must be clear and self-explanatory. Children must be able to understand the message because they will have to explain the message to less literate adults.

\[\text{A screened photograph with the background blocked out.}^3\]

We know that coloured photographs are more attractive for decoration. Coloured photographs are also very expensive. Black and white photographs can be effective on good quality paper with a high quality printing process. Photographs with the background printing are best. Line drawings can be effective on poor quality paper with lower quality printing processes.\(^4\)

Most development agencies cannot afford to compete with advertisers who use glossy coloured advertisements. You can compete by making attractive posters and charts which have a clear simple message. You must select materials that are suitable to the required use.

**BOOKLETS**

**Booklets and Leaflets**

There is a shortage of reading materials in most developing countries. We know that newly literate people must have reading materials to keep practicing their new reading skills. Development messages could form part of the reading material for these newly literate readers.

**Booklets** are small books. They usually have 12 to 64 pages with a strong cover. Booklets are usually about A5 size (an A4 sheet folded in half). A5 size booklets can be easily carried and held for reading.\(^5\)

Booklets will be most effective when the message is about people, events, and activities that are familiar to the reader. Short stories and folk tales are more effective than instructional texts. Lectures should never be used with newly literate readers. Informal teaching using stories is best.

**Leaflets** are a single sheet of paper. Leaflets are often printed on both sides of the page and may be folded. Illustrations in the leaflet must have the same message as the message in the text.

\[\text{[Again, technologies have changed since the 1980s. Most photographs today are taken in colour. Colour images are expected on the web. Remember that images should be properly sized (optimised) for use on the web. It is still true that photographs are often more effective if their backgrounds have been blocked out. Line drawings will still be more effective than photographs when poor quality paper is used. LZ 2008]}\]

\[\text{[A booklet that will fit into the pocket is even easier to carry. Many pocket books have very small type. Newly literate readers find small type too difficult to read. LZ 2008]}\]
Prepared Simplified Training Materials

Leaflets are very short. The information in the leaflet should motivate and remind the reader about your message. A single clear message is best.

**Preparation:** The message must be kept simple. Do not use technical terms. The rules about preparing text are useful when you are writing for newly literate readers. The letters on a typewriter are too small for these readers. Materials for newly literate readers should be printed. It is good if the type size is 14 point or 16 point or larger for newly literate readers.

Black and white photographs can be used for illustrations only when they are printed by the offset printing process on smooth or glossy paper. Shaded line drawings are best for use on rough or lower cost papers. The message in the illustrations must agree with the message in the written text. The rules for preparing illustrations will be useful when you are preparing booklets and leaflets.

Members of your intended audience and field workers can be helpful in preparing these materials. Use their stories and experiences in your materials. For example, you might prepare a short story about the experiences of one of your field workers. Another story might be prepared from the folk tales that you hear during a visit to the community.

The best materials for newly literate readers will probably be stories about members of the intended audience. The message will be explained as part of the story. The message may be in the form of a moral. A lecture type article will not be effective.

**MANUALS**

**Writing Manuals**

Manual writing is a very specialized form of writing.

**Training manuals** explain what to do and how to do it. They provide procedures and background information for a worker who will be doing a particular job. Some training manuals are self-instructional. The worker should be able to follow the manual and properly perform the required job. Other training manuals will be used as part of a training programme with a teacher to help explain the activity.

**Reference manuals** are stores of information. They are a worker's memory. The worker uses a reference manual when he needs to find details about his work. A reference manual contains only the information that the worker needs to know to perform his work.

**Work manuals** provide a basis for work supervision and evaluation. They provide the minute by minute procedures for doing a job. Each of these three kinds of manual can be either prescriptive or descriptive.

**Prescriptive** manuals prescribe an ideal situation. The worker must be trained to do the work in the ideal manner.

**Descriptive** manuals describe an actual situation. They are based upon present training and work routines. The worker does not need new training.

**Contents:** A good manual provides an explanation of the work so that it makes sense. It explains both the procedure for doing the work and specific methods or techniques. It also explains the criteria for making decisions about quality, etc. and alternate procedures to accomplish the work. A good manual explains Why, What, How, and When to do the work.

Make sure that you know exactly who the manual is for, what work these people do (or will do), and how the manual will help them to do this work.

**Decide exactly what kind of manual you are producing.**

A good manual will be an effective tool for a literate worker or his supervisor. A poor manual will be confusing and disruptive to the work.
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A manual for newly literate people is very difficult to write. A worker will be frightened by a large manual or a manual that is written for highly literate people.

**Layout Suggestions:** The layout and design of the written manual will affect how easily the readers will understand the message. Some layouts are better for particular purposes.\(^{16}\)

- **Remembering?** Use sentences arranged in note form when you want a worker to remember the information. For example
  - *Put the needles and the syringe in the pan.*
  - *Cover the needles and the syringe with water.*
  - *Put the lid on the pan.*
  - *Put the pan on the stove.*
  - etc.

  Do not use too many short paragraphs. Arrange sub-headings to the left. Indent the passage under the sub-heading.

- **Reference?** Reference materials need to be easily looked up when required.

  Use **Tables** if the reader knows what to look for. Use **Logical Trees** (algorithms) if the reader needs help in finding the information [see next page].

- **Use questions as headings.** Questions direct the reader's attention to the information in the text.

- **Numbering?** Use simple arabic numerals for numbering sections, e.g.: 1, 2, 3, etc.\(^ {17}\)

  Many numbering systems are confusing. The numbers i, ii, iii, iv, etc. are unfamiliar to many people. Numbers like 7.2.23, 7.2.24, etc. are confusing.\(^ {17}\)

  Sometimes you need the chapter number for reference. Start with the chapter number and add a single point. Number the sections consecutively through the chapter as follows: (Chapter 2) 2.1, 2.2, 2.3, etc.

  Use a dash to emphasis sub-sections as illustrated above.

**Tables and Logical Trees**\(^ {18}\): many people have difficulty reading complicated written materials. Even an expert may have difficulties reading instructions that are complicated.

Tables and logical trees are graphic presentations of text information.

A **Table** is a presentation of numbers or text. A table uses a grid-like arrangement of rows and columns. Each column and each row has a label or heading. The label organizes the information in the table.

Use a table when the reader knows what information is required. Label the table clearly with a title that explains the purpose of the table.

A **Logical Tree** is a graphic presentation of the decisions involved in solving a problem. A simple logical tree uses questions that can be answered Yes or No.

- Questions must be kept simple.
- Use several trees for complex ideas.
- Do not allow flow lines to cross.
- Be consistent in the direction of flow, for example, keep all the Yes responses going to the right.

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\(^{16}\) One of the best sources of information about the layout and design of printed materials is *Designing Instructional Text* by James Hartney. This book was published by Kogan Page, London in 1978.

[Two more revised editions have been released since 1978. LZ 2008]

\(^{17}\) [Modern practice is to avoid numbers, except for chapters, unless the numbers indicate a sequence.

All of the numbered lists in the original guide have been replaced by bullets in this electronic version. The photographs on page 5, however, have retained their numbers as the numbers indicate an order of procedure.

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\(^{18}\) [There is a brief example of a Logical Tree on the next page. LZ 2008]
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Deciding to Prepare Training Materials

|-- YES -- Evaluate and select from available written materials.

|-- YES -- Written materials available?

|-- No -- Design, test and prepare appropriate materials.

Is the Audience Literate?

|-- NO -- Choose a technique which doesn't require reading.

Part of a Simple Logical Tree

Bibliography

The following references are very selective. I have not included all the references to books, etc. that might be useful. I have included only the most important books for a person trying to build a basic reference library. A good dictionary would also be necessary.

If I had a very limited budget I would obtain a dictionary and the books by Hartley and McBean.


[This is the bibliography for the original 1982 guide. Most of these books and articles are still available from booksellers on the web. Many of them are now out-of-print and some may be out-dated in their content.

A 'Google' search on the web or a visit to your local library will provide current alternatives. LZ 2008]