



TOOLKIT for Making Written Material Clear
and Effective

SECTION 2: Detailed guidelines for writing
and design

PART 5

Understanding and using the “Toolkit
Guidelines for Graphic Design”

Chapter 2

Guidelines for overall design and page layout

U.S. Department of Health and Human Services
Centers for Medicare & Medicaid Services



TOOLKIT Part 5, Chapter 2

Guidelines for overall design and page layout

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This document is the second of eight chapters in Part 5 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers Consulting, Inc. The guidelines and other parts of the Toolkit reflect the views of the writer. CMS offers this Toolkit as practical assistance to help you make your written material clear and effective (not as requirements from CMS).



Introduction

About the Toolkit and its guidelines

The *Toolkit for Making Written Material Clear and Effective* is an 11-part health literacy resource from the Centers for Medicare & Medicaid Services (CMS). To help you develop or revise your written material, the Toolkit includes detailed guidelines for writing and design. There are 26 guidelines for writing and 46 for graphic design. For the full list, see Toolkit Part 3, *Summary List of the “Toolkit Guidelines for Writing and Design”*.

About this part of the Toolkit

Part 5 of the Toolkit focuses on the guidelines for graphic design. These guidelines apply to designing various types of written material intended for use in printed formats (see Toolkit Part 1). (For discussion about material that is read on a computer screen, see Toolkit Part 8, *Will your written material be on a website?*)

What is this chapter about?

This is the second of the eight chapters on design in Part 5. It explains how to apply the Toolkit Guidelines for overall design and page layout. As with all of the Toolkit chapters on design, this chapter assumes that you have not had formal training in design.

What aspects of design are covered in the other chapters?

The other chapters in Toolkit Part 5 cover the following topics: tips for learning about design and working with design professionals (Chapter 1); fonts (typefaces), size of print, and contrast (Chapter 3); headings, bulleted lists, and text emphasis (Chapter 4); use of color (Chapter 5); use of photographs, illustrations, and clip art (Chapter 6); tables, charts, and diagrams (Chapter 7); and forms and questionnaires (Chapter 8).



Goals of document design

Toolkit Part 4 gives guidelines for clear and effective writing, explaining how to write text that is clear, simple, and culturally appropriate for your readers. But making written materials easy for people to understand and use requires good design as well as good text. How you design your materials can reinforce or detract from the messages you are trying to get across. **Good design can enhance poorly written text, to a degree, but poor design can ruin the best of text.**

To work well, design needs to accomplish three things:

- **Attract your reader’s attention.** The people you are trying to reach will make a snap judgment about the written material based on a quick glance. They may be in a hurry, distracted, or worried about their health. Since you have only a few seconds to convince them to read the material, first impressions are crucial, and design has huge impact on first impressions.
- **Hold their attention so they will read the material.** Catching people’s eye is the first step, but it’s what they do immediately afterward that counts. Do they keep reading? Or do they give up because what initially caught their eye was hard to read, confusing, or culturally inappropriate for them?
- **Help them understand and use the messages in the material.** While document design needs to be appealing to attract and hold your readers’ interest, the bottom line is whether the readers can understand and use the material. Document design that reinforces key messages is especially important for readers with low literacy skills (see Toolkit Part 2, *Using a reader-centered approach to writing and design*).

Written for non-designers, this group of chapters on design will help you become a better-informed and more discriminating judge of graphic design. You’ll learn how to recognize and avoid many common problems in design. The specific guidelines will help you improve the look of your materials and their impact on readers.



Things to know about the “Toolkit Guidelines for Design”

As you read Chapters 2 through 8 with guidelines for design, here are some things to keep in mind:

- **To be clear and effective, written materials need both good text and good design.** In these chapters on design, *we assume that the text is already good* so that we can focus on how to package it in an effective design.
- **Design guidelines in this Toolkit are oriented toward the needs of less-skilled readers and the needs of older adults such as people with Medicare.** For example, our guidelines stress the need for highly readable fonts, print that is large enough for easy reading, and a clean, uncluttered layout with a clear path for the eye to follow. These and other design features that are crucial for less-skilled readers and older readers will work well for the rest of your intended readers, too.
- **Design is an art, not a science, with lots of room for subjective judgment and differences in taste.** Despite consensus on many fundamentals, there are areas of controversy within the field of design (see discussion in Schriver, 1997). In these chapters on design, we present basic principles and use examples to illustrate them. Our guidelines emphasize things you can do to make your materials easier for less-skilled readers to understand and use. They also try to steer you away from some common practices that tend to cause problems for readers. But the guidelines are not hard and fast rules. There is no one “right” way to implement them, and our examples show only a few of the possibilities. Applying the guidelines in combination to your own materials is both an art and an adventure.
- **Design guidelines in this Toolkit are oriented toward materials written in English and may require cultural and linguistic adaptation for materials in other languages.** The discussions of overall layout and navigation, in particular, assume that text is read from left to right. This is not true for all languages. If you are translating materials into languages that read from right to left, such as Arabic or Hebrew, the entire layout must change. *Dynamics in Document Design: Creating Texts for Readers* (Schriver, 1997) discusses some of the cross-cultural challenges of design, and strongly advocates testing materials with the intended audience.
- **Using a professional designer does not *in itself* ensure that your materials will be designed in a way that is clear and effective for your intended readers.** In part, it’s an issue of training. Most designers are never taught how to make information materials reader-friendly, so they may be unaware that some common practices in design can distract or discourage less-skilled readers and make it harder for them to understand and use written materials. Besides this widespread lack

of training and awareness, there are differences among designers. For more about this, see Toolkit Part 5, Chapter 1, *Tips for learning about design and working with design professionals*.

- **Remember that you are designing for your readers, not yourself.** Your readers’ responses are the ultimate test of effective design. As we emphasize throughout this Toolkit, to know how well your material is working, you need to get feedback directly from your readers (see Toolkit Part 6 *How to collect and use feedback from readers*).



List of guidelines covered in this chapter

This chapter discusses the guidelines for overall design and page layout shown below in Figure 5-2-a. (For the full list of guidelines for design, see Toolkit Part 3, *Summary List of the “Toolkit Guidelines for Writing and Design”*).

Figure

5-2-a. Toolkit guidelines for overall design and page layout.



Design the size, shape, and general look of the material with its purpose and users in mind. Consider whether there are ways to change features such as size and shape to make it more functional, more eye-catching, or more appealing to your readers. Also, consider possible ways to make it easy to produce and distribute.



Make the material look appealing at first glance. Create uncluttered pages with generous margins and plenty of white space. Include something to catch the reader’s eye but not confuse it. A clean, crisp layout encourages readers by making the material look as if it’s going to be easy to read.



Create a clear and obvious path for the eye to follow through each page. Design your layout to fit with a reader’s natural and deeply ingrained way of progressing through a printed page (called “reading gravity”). Place the headings, text, and images in a way that guides readers smoothly through the material without diverting or distracting them.



Create an overall design for the material that has a clear and consistent style and structure. For a clean and well-organized look, use a page grid and style sheets to guide your design. Line up your headings, blocks of text, lists, illustrations, and other design elements in a clear and consistent way. Keep the same style or “look” throughout the material.



Source: Created for this Toolkit. For more about the guidelines and how to use them, see Toolkit Part 3, *Summary List of the “Toolkit Guidelines for Writing and Design”*.



Consider how the material will be used



Design the size, shape, and general look of the material with its purpose and users in mind.

Consider whether there are ways to change features such as size and shape to make it more functional, more eye-catching, or more appealing to your readers. Also, consider possible ways to make the material easier or more cost effective to produce and distribute.

To help decide on a size, shape, and general look for written material, think about its purpose and users. How will people get the material, and what will they do with it?

Here are some things to consider:

1. Is there anything you can do about the size and shape that might make it more functional?

- **Making the size convenient for users.** If you are creating a brochure, is it small enough to fit conveniently into a purse or pocket (especially if it is about a sensitive subject)? If you are producing a folder of materials about Medicare for agency staff or community organizations, does it fit easily into a file drawer?
- **Adding to its usefulness.** If you are producing a refrigerator magnet that gives the nurse help line number, does it make sense to enlarge it a bit and add some tips about getting urgent and emergency care?
- **Removing possible barriers.** Is there anything that might deter people from using the material? For example, is your poster so large that people may feel it takes up too much of the available space on a bulletin board?

2. Is there anything you can do about size and shape that might make it easier or more economical to produce or distribute?

- **If you are planning to mail the material, it’s wise to check on postage costs at an early stage, while there is still time to make adjustments.** Get samples of the paper you will use, and create an actual-size mockup. Put it in the envelope you plan to use, and weigh it for postage. Usually a standard size envelope is most economical. If you use a non-standard envelope, be sure to check on postal surcharges that may apply. By checking on mailing costs at an early stage, you may discover that you can save substantially by making slight adjustments in the paper, shape, or size. This could be important if you plan to mail large quantities.
- **Using websites to distribute written materials can be convenient and economical.** If you are distributing the material by posting it to a website, you will need to design the material with this distribution method in mind. For example, the size should be 8 ½ by 11 inches, to match the paper that people will be using to print the downloaded document. Also, for convenience to users, you may want to provide two versions of PDFs, one in color and one in black and white that is optimized for photocopying (see Toolkit Part 8, *Will your written material be on a website?*).

3. Is there anything you can do about size and shape Is there anything you can do about size and shape to improve the appeal and ease of use?

- **Try to avoid using formats that are tall and narrow, especially for longer documents such as booklets.** A narrow column format can be hard to read, especially if the type is reasonably large and the line length is short (see Guideline 6.11 in Toolkit Part 5, Chapter 3, *Guidelines for fonts (typefaces), size of print, and contrast*). If you are designing a folded brochure, try to make the panels wide enough for an attractive look. You may need to use a tall, narrow shape for some

purposes, such as for material that needs to fit on a literature rack. For more about tri-folds, see Figure 5-2-f later in this chapter. It discusses the challenges of formatting a tri-fold brochure.

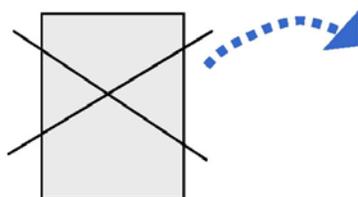
- **In general, try to use a “portrait” orientation to your pages** (pages are taller than they are wide) **rather than a “landscape” orientation** (pages are wider than they are tall). Portrait orientation is more familiar to your readers, less awkward when fully opened, and typically easier to design as an effective layout. If you do use a landscape orientation, you will likely need to use two columns to keep the lines of text to an appropriate length for easy reading (see Toolkit Guideline 6.11 in Toolkit Part 5, Chapter 3, *Guidelines for font (typefaces), size of print, and contrast*).
- **Consider a size or shape that’s a little different from what you would ordinarily use.** Departing from the usual size and shape can help draw attention to your material. It may also be more pleasing to your readers. Figure 5-2-b below offers a few ideas.

Figure

5-2-b. Ideas for size and shape of written materials.

Try a square shape for a booklet

If your booklet is long, try making it 8 inches square instead of the common 8 ½ by 11 standard page size.



The square shape is less common, so it may draw more attention. It looks less imposing, so your readers may find it friendlier and more inviting.

Figure 5-2-b, continued.

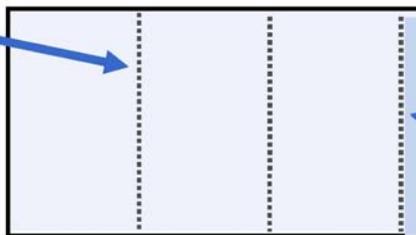
Make a three-sided table tent

This triangular piece stands on top of a table or counter. You could use this easy and eye-catching format to draw attention to your messages in settings such as information counters, waiting rooms, and cafeterias.

Start with a large and long rectangle of heavyweight paper or cardstock (such as 80 lb. cover stock).

Design and print **three panels of equal size**, leaving room for a flap at the end to overlap and connect the sides.

Dotted lines show where you will score and fold the table tent.



To assemble the tent card, use doublestick tape on this end flap to connect the sides.



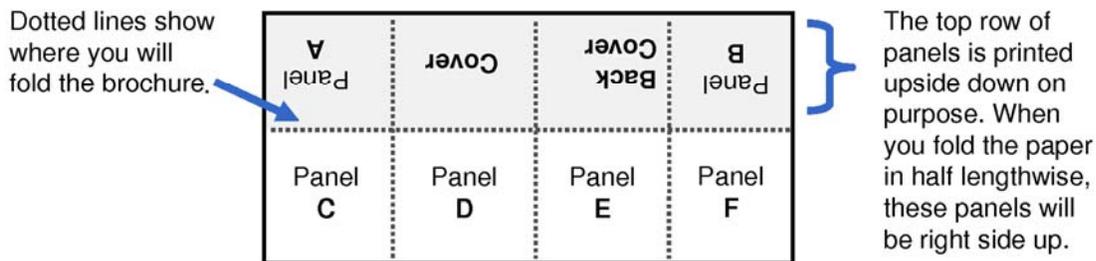
Tips for using the table tent format:

- **Include high-impact visuals** to make the table tent look intriguing from across the room.
- **Limit the amount of text, and make it larger than usual**, for ease of reading from a short distance.
- **Design the panels to make sense in any order**, since people might start reading it from any of the three sides.
- **Wider panels are easier for people to read** and easier to design. If you use an 8 ½ by 11 sheet, your panels will be 3 ½ inches wide with a half inch flap at the end. A longer sheet of paper, such as legal size, will give you wider panels.

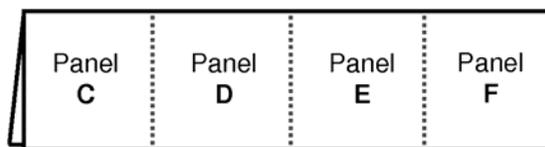
Figure 5-2-b, continued.

Try folding a legal size sheet into a small square flyer

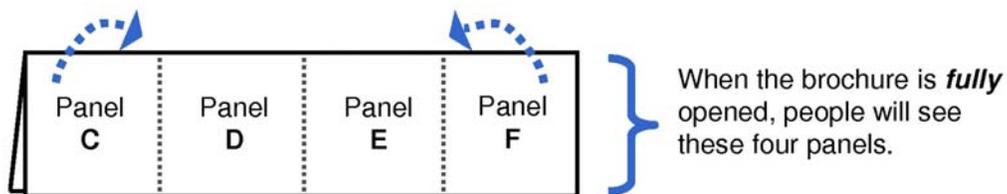
Start by designing an eight-panel format on your legal size sheet (8 ½ by 14 inches).
As shown below, you will print these panels on one side of the sheet only, then fold it over.



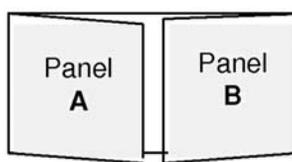
Next, fold the paper in half lengthwise. Turn so that panels C through F are facing you:



Next, make a “gate fold” by folding in the side panels C and F so that they meet in the middle. As shown below, this folding will cover up panels C through F, and expose panels A and B.

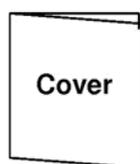


This is called a “gate fold” because the sides meet in the middle, like gate doors that swing open from the center.



When the brochure is **first** opened, people will see these two panels.

Finally, fold panel A over onto panel B, and you will expose the cover of the brochure:



For more ideas about formats to try, see *Before & After Page Design* by John McWade (2004). This beautiful and helpful book includes ideas similar to the ones in this figure, and a number of others, including an eye-catching zigzag brochure (page 72), a brochure with a simple triangular pocket to hold inserts (page 64), and an accordion-folded brochure with peek-a-boo panels (page 54).



Source: Created for this Toolkit.



Make it appealing at first glance



Make the material look appealing at first glance.

Create uncluttered pages with generous margins and plenty of white space. Include something to catch the reader's eye but not confuse it. A clean, crisp layout encourages readers by making the material look as if it's going to be easy to read.

Your potential readers make snap judgments about your written material based on their first impressions. A clean, crisp look helps attract and hold your reader's attention:

- **To create a good first impression, resist the temptation to crowd a lot of text into limited space.** A “wall of text” unbroken by headings or bullet points is unappealing at best, and will discourage or intimidate less-skilled readers. Testing with readers shows that people would rather read a slightly longer document that is well-formatted than a shorter document that looks cramped and crowded (Canadian Public Health Association, 1998).
 - **Revise it.** If you are crowding too much text into one page, either condense the text or spread it out onto more pages. For example, if you have verified through testing that your intended audience won't read more than a single page, and your one-page layout is crammed with text, then you will need to cut some of it to make the page appealing.
 - **Use a mockup to help.** A mockup is an actual size replica of the finished product in draft form. If you start working with a mockup when you begin designing the written material, it will be easier to write an appropriate amount of text for the space you have available.

When you use a mockup to display your draft text, you will know immediately whether you are writing too much. This will help you be realistic about how many messages you can include.

- **Be sure there’s enough “white space” to give your readers’ eyes a resting place.** White space is the empty space in written material that has no text or graphic elements. This empty space is white when your paper is white.
 - **“Breathing room.”** Ample white space contributes to a good first impression by making your materials appear easy to read, which is especially important to vulnerable groups such as less-skilled readers and older adults with some vision loss. Generous margins and other white space give your material some “breathing room” so that it doesn’t look crowded and overwhelming at first glance.
 - **Keeping white space consistent.** Later in this chapter, we discuss using a page grid and style sheets to establish consistent margins, alignments, and spacing throughout the document. Taking this approach will help you maintain consistent and generous margins and other white space.

Analyze and de-clutter your design

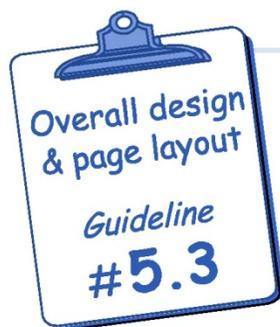
Take a fresh look at your material. What could you remove or change to streamline the appearance of the text and design? Sometimes you can make a big change or two to streamline your layout and foster a better first impression. Other times, making a number of relatively small changes can add up to a big improvement in the overall appearance of your material. Here are some suggestions:

- **Use the design guidelines and examples in this Toolkit to help you spot ways to de-clutter your design.**
 - For example, this Toolkit recommends strongly against the common practice of boxing in the text you want to emphasize. Outline boxes add clutter to a layout, and putting lines around text may even deter some people from reading it. For an example, see *Why Bad Ads Happen to Good Causes* (Goodman, 2002). For tips on better ways to emphasize a block of text, see Figure 5-4-d in Toolkit Part 5, Chapter 4, *Guidelines for headings, bulleted lists, and emphasizing blocks of text*.
 - There are many other examples of “de-cluttering” in the Toolkit. For examples that show de-cluttering of images, see Toolkit Part 5, Chapter 6, *Guidelines for use of photographs, illustrations, and clip art*.

- **To get a fresh perspective on your design, it may help to create a miniature photocopied version of your pages in black and white.** The reduction in size and removal of color (if any) lets you focus on the overall impact of the layout. It lets you analyze the bare bones of your design without being distracted by the words and other details on the page.
- **Look through design books and examples for inspiration and insights into what makes a good layout.** For example, you can leaf through the good and bad examples of materials you have collected. Also, check the resources listed in Figure 5-1-a in Toolkit Part 5, Chapter 1, *Tips for learning about design and working with design professionals*.
- **Use results from testing to guide revisions to your layout.** Testing can show which parts of the layout tend to confuse or overwhelm your readers. For step-by-step instructions, see Toolkit Part 6, *How to collect and use feedback from readers*.



Create a clear and obvious path for the eye to follow



Create a clear and obvious path for the eye to follow through each page.

Design your layout to fit with a reader’s natural and deeply ingrained way of progressing through a printed page (called “reading gravity”). Place the headings, text, and images in a way that guides readers smoothly through all of the material without diverting or distracting them.

How readers typically work their way through a printed page

As a skilled and experienced reader, you probably approach a printed page on “autopilot,” unaware that force of habit and features of the page affect where you start reading and how you move from one part of the page to another. But next time you glance at a piece of written material, try to be aware of what your eyes and mind are actually doing as you react to the material:

- What do you look at first? Where do your eyes go next?

- Do you move automatically in a smooth progression from one area of the page to the next? Or do you find yourself flitting from one part of the page to the next, trying to figure out what the page is about and where you should look next?
- When you’re finished, look back at the page very closely: was there anything you missed when you first glanced through it?

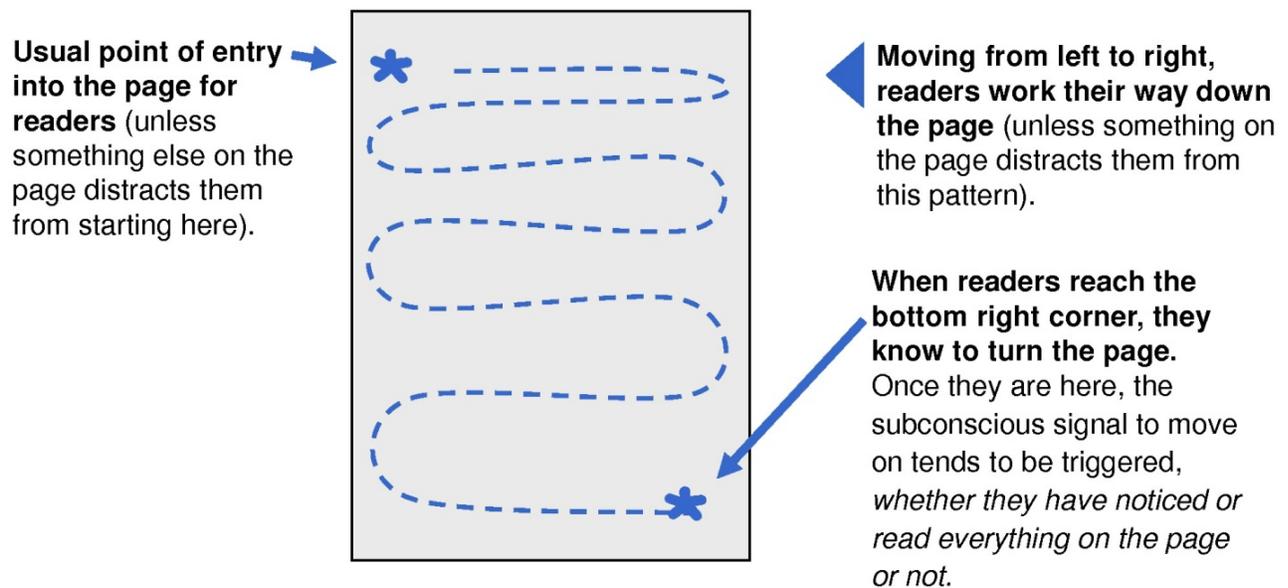
Now compare your reactions to the basic pattern of how readers usually work their way through a printed page. Wheildon describes this pattern of “reading gravity” in his book called *Type & Layout: Are You Communicating or Just Making Pretty Shapes* (2005). Unless something throws them off track, people typically enter a page at the upper left corner, work their way back and forth down the page, and exit at the lower right corner.

The diagram in Figure 5-2-c below explains this concept of “reading gravity.” Keep in mind that this diagram and the other ones on reading gravity in this section describe a pattern that applies to materials written in a language such as English that reads from left to right. This pattern doesn’t apply to languages that read from right to left.

Figure

5-2-c. “Reading gravity” and its implications for effective page design.

“**Reading gravity**” refers to a reader’s typical progression through a printed page. Conditioned by years of habit, readers typically start at the top left corner. Then they go back and forth across the page, and are “pulled down” to the bottom right by “reading gravity.”



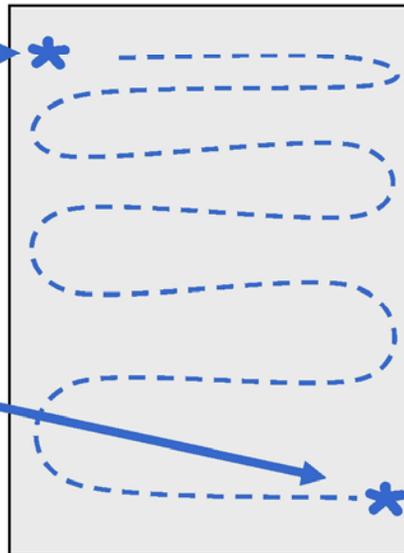
Since a reader’s typical path through a printed page is so deeply ingrained, it makes sense to design your pages in ways that anticipate and accommodate it. The diagram below shows how you can use knowledge of reading gravity to design an effective page layout.

(continued on next page.)

To help readers to notice everything on the page,
make your layouts consistent with "reading gravity"

Create a strong point of entry here with a main heading or strong visual.

Don't give readers a reason to jump down here first, or they may move on, overlooking other parts of the page.



Create a clear and obvious path through the page.

- Place the text and visuals in a way that fits with a reader's typical pattern of moving back and forth and down the page.
- Since strong visual elements draw readers' attention, creating a clear path helps readers notice the text as well as the visuals.

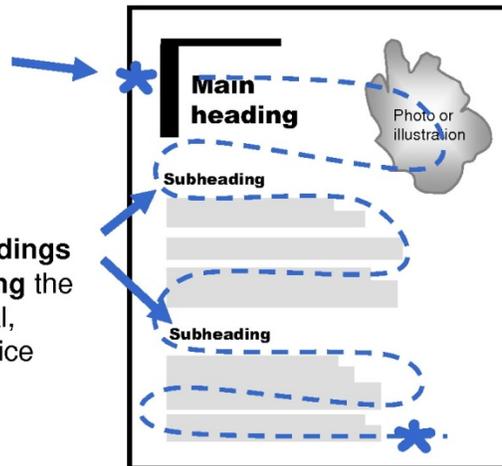
To show how this works, the next two diagrams give you illustrations of page layouts that are compatible with reading gravity. The first is a simple one-column layout, and the second has two columns.

(continued on the next page.)

The two sample page layouts that follow are **consistent** with “reading gravity”:

Prominent main heading invites readers to start here and fits with their usual habit of starting at the top left.

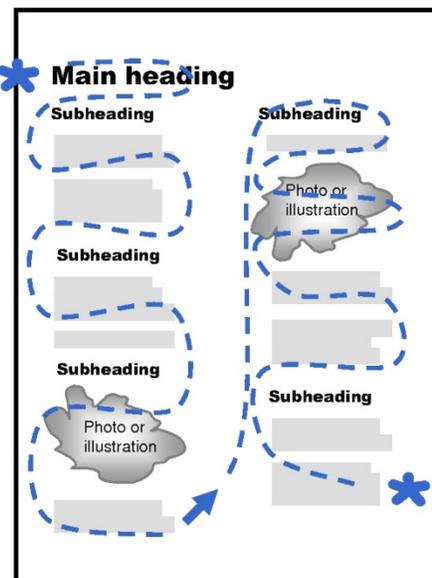
The prominent subheadings help move readers along the path through the material, encouraging them to notice the text.



This layout has a clear and simple path that's easy to follow. There are no distractions to keep readers from moving steadily *back and forth* and *down* the page.

This main heading is a strong point of entry that fits with reading gravity.

This layout encourages people to pause and read the text because it *looks* like it will be easy to read. It has short chunks of text broken up by subheadings and two illustrations, and there's lots of “white space.”



The two column format and prominent subheadings create a clear path through the page that fits with reading gravity.

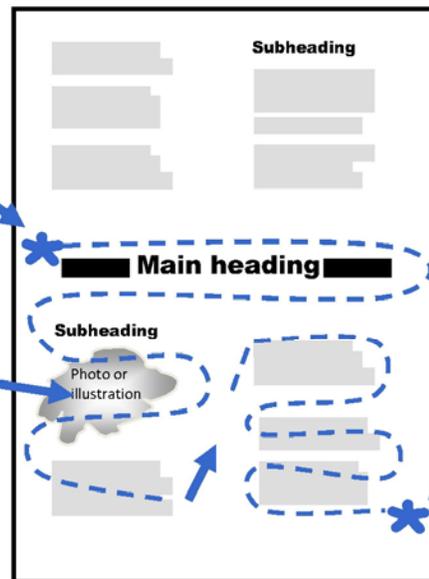
There's nothing to make readers jump down here before they look at the rest of the page

Finally, the last two diagrams give examples of layouts that do *not* follow reading gravity. As shown in these examples, if your page layout is incompatible with reading gravity, your readers are very likely to miss some of the information on the page, or get confused.

The two sample page layouts that follow are **not** consistent with "reading gravity":

Readers will probably start by looking at the middle of the page, then move directly down to the subheading and photo below.

This photo also pulls readers down into the bottom half of the page, especially since it's the only one on the page.

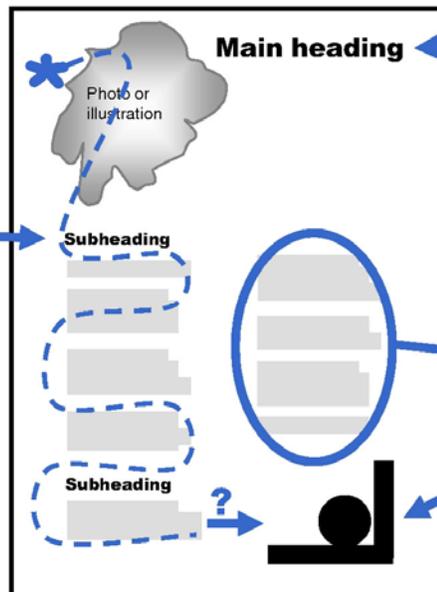


Many readers will miss this top half because it is text heavy and the strong point of entry is halfway down the page. When readers start in the middle of the page, they tend to move down from there (following reading gravity).

When readers reach the bottom right corner, they tend to feel that they have finished with the page. They may never glance back up to notice the top half.

This photo is a strong point of entry.

Many readers will probably look here next, because people tend to look down immediately after they look at a photo, and because the subheading will draw their eye.



Some readers will miss this main heading because of its placement, even though the text is large and bold.

Will readers skip over the text-heavy second column because the strong visual in the bottom right corner catches their eye?



Source: Created for this Toolkit based in part on concepts discussed in Wheildon 2005 (second edition) and 1996 (first edition), and on the Toolkit writer’s experiences testing materials with readers.

Designing materials to be compatible with natural patterns of reading

As these examples in Figure 5-2-c illustrate, it’s important to design your page layouts to work *with* the natural tendencies of the reader, rather than *against* them. You want the design to help your readers, not hinder or distract them.

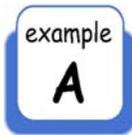
This same principle of making a clear and obvious path through each page also applies to navigation from page to page. Creating this smooth progression through your written material requires well-organized text formatted in a manner that emphasizes the underlying organization. The text and the design both contribute to ease of navigation:

- In Toolkit Part 4, Chapter 2, *Guidelines for organizing the content (sequencing, grouping, and labeling)*, we discuss how to work on the *text* part of creating this smooth progression. The guidelines in this chapter tell how to develop a sequence of topics that makes sense to your readers and how to label it with headings and subheadings that are meaningful and informative to them.
- In this chapter you are reading now, and in the other chapters in Toolkit Part 5 on guidelines for design, we suggest many specific ways to use visual elements to help guide your readers smoothly through this well-organized text without diverting or distracting them.

Figure 5-2-c above used generic diagrams to present the concept of reading gravity. To help illustrate this concept, Figure 5-2-d below shows an example using actual text and photographs.

Figure

5-2-d. Two layouts - one is compatible with “reading gravity” and the other is not.



The layout shown below **distracts your readers** from the main points. It is not compatible with “reading gravity.”

Where will readers look first?

Readers see these two facing panels when they open the tri-fold brochure. Do you think they will read the top part first, or look immediately at the photos?

There's no strong point of entry here. Also, the blue background discourages readers from starting here because it makes all of the text harder to read.

Should you call the Quit Line?
Are you ready to quit? Call and we'll help you make your plan.
Not quite ready to quit? Call and we'll help you get started.
Have you tried to quit and it didn't work? It can take more than one try to quit for good. Don't be discouraged. Call us. We'll help you make a new plan.
Want to help someone quit? Call and we'll give you tips.
Have you already quit? We know it's hard for a while. If you need some help to stay tobacco-free, please call us.

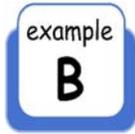
Whether you smoke or chew, we can help you quit for good. We know ways to make it easier. We give you friendly support and practical tips that really work.
You'll get help that fits your needs. Everybody is different. The help we give is personalized for your situation.
The Quit Line really works. People who get help from the Quit Line are twice as likely to quit for good.
Our help is free and confidential.
It's all free. The call is free, our help is free, and the kit of materials is free. The Quit Line is run by the state and paid for by state tobacco taxes.
We respect your privacy. Calls to the Quit Line are confidential.

Following her gaze leads readers off of the page.

Following their gaze leads readers to look down.

The headings are not working well. They are four points larger than the text, but they don't stand out:

- No contrast in style of font – it's the same serif font for both headings and text.
- Headings are not bolded.
- Heading text is blue and so is the background (colored text reduces contrast, and having a shaded background makes it worse).



The layout below emphasizes the main points and guides readers smoothly through the page. It is compatible with “reading gravity.”

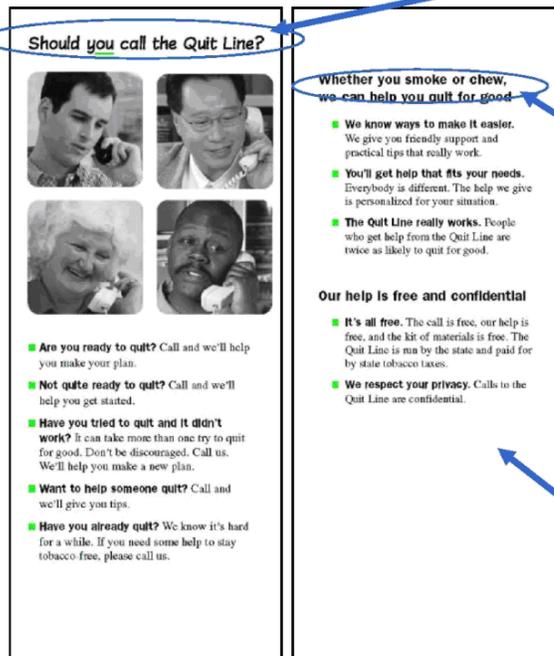
Improved layout. To make the brochure compatible with reading gravity and easy to skim, we changed the placement of the photos and added contrast throughout.

Main heading and photos are a strong point of entry

- The photos are grouped together for impact.
- Poses are oriented to draw readers downward toward the text that’s underneath.

Easy to skim for main points

Bulleted points with bolded text at the beginning make the brochure easy to skim.



This main heading stands out clearly – it has strong contrast, it’s larger than the subheadings, and it has a special font to add a friendly tone.

This subheading stands out clearly and helps draw readers to the top of the second column. Aligning this subheading with the top of the photos (rather than opposite the main heading) helps make the main heading pop out clearly as a title for both panels.

White background makes all of the text easy to read.

Source: The materials in these examples were created for this Toolkit. Example B is a two-page spread from the tri-fold brochure featured in Toolkit Part 10, “Before and after” example: *Using this Toolkit’s guidelines to revise a brochure*. Example A shows the same text as Example B but has been formatted specifically to illustrate poor contrast and violation of “reading gravity”. It is based on a brochure produced by the State of Oregon and is adapted with permission for use in this Toolkit. For more information, see Toolkit Part 10.

Tips for making navigation easier for less-skilled readers

In the figures above, we’ve seen examples that show how details of layout influence ease of navigation through written materials. Here are some general tips on ways to make it easier for less-skilled readers to notice everything that’s on the page.

- **Establish a clear hierarchy of importance on each page, without too many elements fighting for attention all at once.** Don’t put too much on any one page—either text or graphic elements. Simplicity and white space make it easier for your readers to concentrate on the meaning of the information in the document. As emphasized in the examples above, be sure that each page has a clear point of entry in the top left corner and a logical progression from section to section within the page that is consistent with readers’ natural progression through a page. If your layout violates “page gravity,” you may cause some readers to miss some parts of the page.
- **Use prominent headings, bullet points, text emphasis, and other devices to help readers skim and find information of personal interest.** For detailed discussion of these important navigational devices, see Toolkit Part 5, Chapter 4, *Guidelines for headings, bulleted lists, and emphasizing blocks of text*.
- **Maintain general consistency of layout and design elements from page to page** to help keep your readers on track. Keep in mind that many readers will flip from page to page to see if the material interests them. They may start reading at any point. This means that the organization and topics covered need to be clear at a glance on every page, and from page to page. (The next guideline in this chapter covers consistency and unity of design).
- **Try to avoid cross-references to other parts of the document**, because these may confuse your readers, or you may lose them (they may skip to the cross reference and never come back). In general, put information that’s needed right where it’s needed, rather than sending the reader somewhere else in the document to get it. For example, it is better to repeat the nurse help line number in several places than to keep sending the reader to the end of the document to find it. It is better to define words right where they are used, rather than sending readers to a glossary.
- **If testing shows that your readers are confused about navigation, assess the content of your print piece.** Are you trying to cover too much in one document? Do you need to tighten the organization of the document? Especially if your topic is complex, consider whether it might be best to use another method, such as videotape or personal assistance by telephone, either as a supplement to or replacement of your print materials.
- **Be alert to formats and features that make navigation more difficult for less skilled readers.** If your materials are for less-skilled readers, it’s important to be aware of formats and features

that can cause navigation problems for less-skilled readers, *even if they cause no problems for people with good reading skills*. The next two sections show how two popular formats -- side text and tri-folds -- tend to make navigation more difficult for less-skilled readers.

Text off to the side can cause problems for less-skilled readers

People with limited reading skills, in particular, need documents that have a smooth and unbroken progression from one topic to the next through the entire document, with a minimum of cross-references. Figure 5-2-e shows how putting short blocks of text off to the side, apart from the main flow of text, makes navigation and comprehension hard for less-skilled readers.

Figure

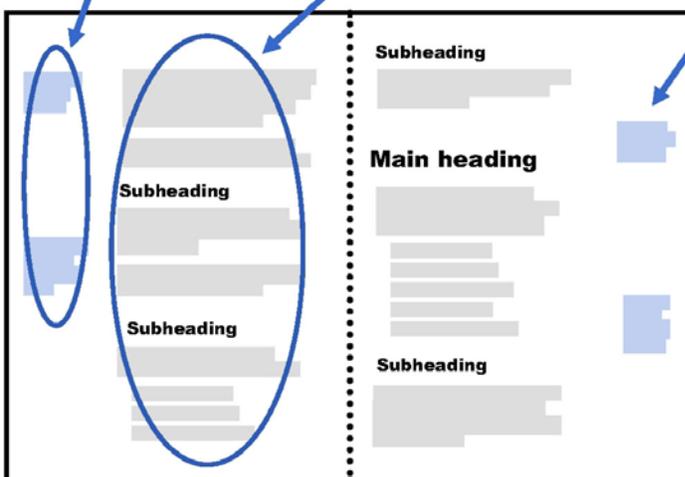
5-2-e. Why putting short blocks of text off to the side makes written material more difficult for less-skilled readers.

The format shown below is a popular one for written materials. This format is appealing and effective for skilled and motivated readers. But, as we explain below, it does not work well for less-skilled readers. The text that is off to the side competes with the main text, diverting the reader and making comprehension more difficult.

Each page has a **narrow outer column** and a **wide inner column**

used for intermittent short blocks of text

used for the continuous flow of main text



The short blocks of text can be used in different ways:

- For pull-out quotes
- To give examples of something covered in the main text
- For small pictures or other visual interest
- To add a point that is related to the main text
- To give a definition or a brief explanation
- To refer the reader to a different section of the material

Figure 5-2-e, continued.

Extra cognitive burden – connections are not spelled out

Since the main text and short blocks of side text are presented in separate columns, it's up to the reader to figure out how (if at all) they are connected. This adds an extra burden of complexity that is very hard for less-skilled readers.

Navigational challenge – no clear and obvious path to follow

The side text and main text compete for attention, which is hard on less-skilled readers. If they skip around the page, there is too much to remember and try to integrate. They are likely to get discouraged or overlook some of the text on the page.

Here are a few of the possible paths that readers might take:

Focus on the side text, ignoring much or all of the main text

- Often, side text is formatted in ways that make it look more interesting than the main text.
- Side text is short, so it may appear to be easier.
- If headings and subheadings for the main text stand out, they may also draw the reader's attention.

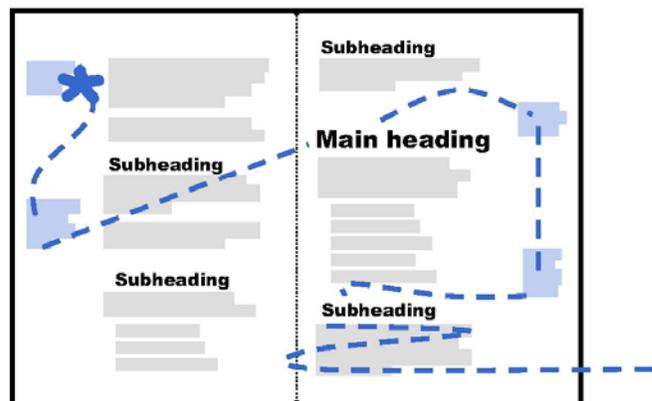
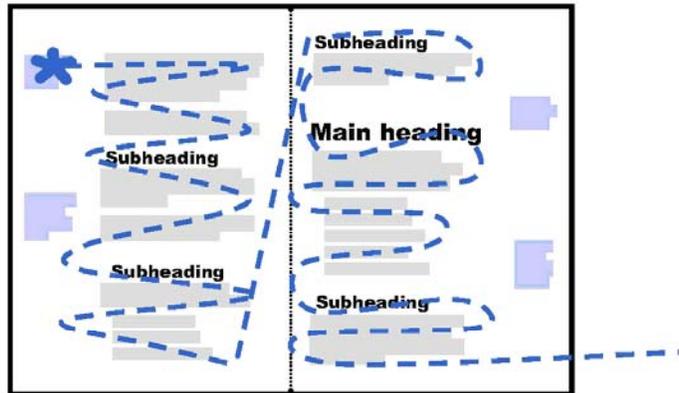


Figure 5-2-e, continued.

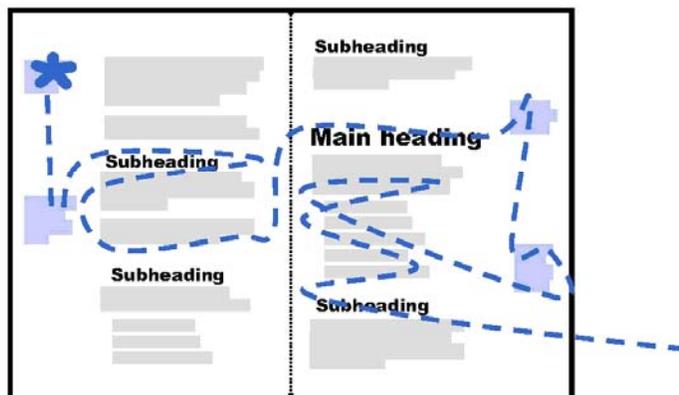
Focus on the main text, ignoring much or all of the side text.

- Often, side text is formatted in ways that prove hard to read, such as small print in a condensed font, or very short line lengths.
- Prominent headings and bullet points may draw more attention.



Skip around, looking at some of the main text and some of the side text.

- When there's no clear path through the material, readers may be more likely to jump around, looking at whatever catches their eye next.
- Skipping around from topic to topic makes it hard for less-skilled readers to learn and absorb new information.



Source: Created as an example for this Toolkit.

What to do instead of putting short blocks of text in the margin

As shown above in Figure 5-2-e, setting some parts of the text apart from the rest reduces cues about its relative importance and how and where it fits with other information on the page. This leaves it up to the reader to *notice* the text that is set apart, *read* it, and *try to figure out* if it fits-- and how it fits-- with the rest of what they were reading on the page. While this added burden may not pose problems for a skilled, knowledgeable, and attentive reader, it can be distracting or even discouraging for many readers. Given the burden that this formatting places on the reader, it seems best to avoid it (unless you are writing for an audience of skilled readers).

Let's suppose that your material that has pullout-quotes, definitions, or other short blocks of text in an outer margin of the page. What could you do to make it easier for your readers? It depends on the content and purpose of the short blocks of text:

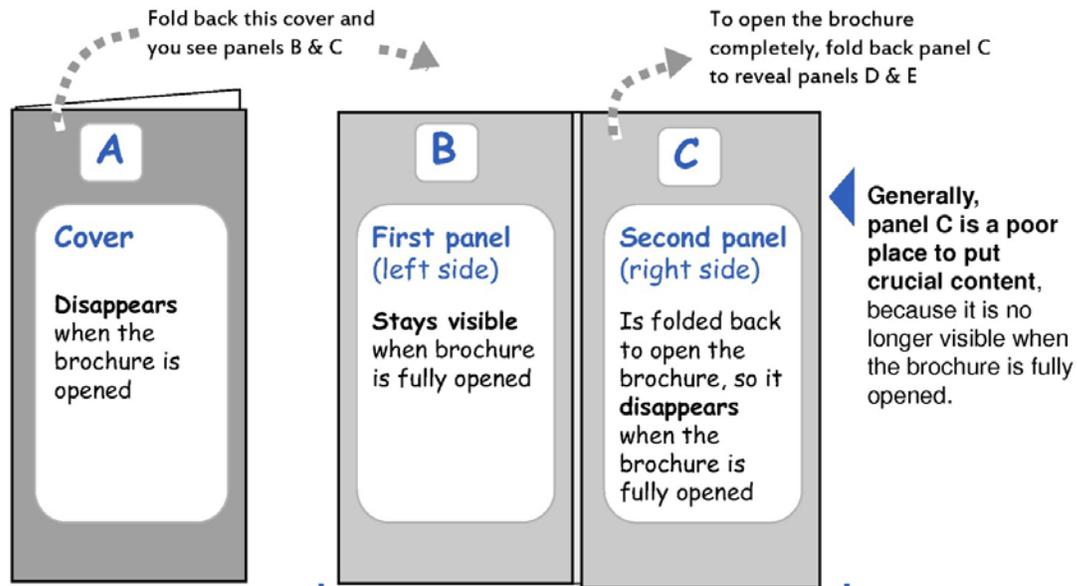
- **Whenever feasible, integrate it into an appropriate spot within the main body of text.** Often, the text that has been pulled out and set apart could just as easily be part of the main body of text. For example, if you are putting definitions into the margin, make it easier on your readers by moving them right to the place where the reader needs them (see Guideline 3.4 in Toolkit Part 4, Chapter 3, *Guidelines for writing style*).
- **Use effective ways to emphasize the main points.** Sometimes, text is pulled out to the margin to emphasize an important point. To ensure that your readers notice this point, put it where it belongs within the main flow of text and use another more effective way to add emphasis. For examples of ways to emphasize a block of text, see Figure 5-4-d in Toolkit Part 5, Chapter 4, *Guidelines for headings, bulleted lists, and emphasizing blocks of text*.
- **If there is no obvious place to integrate the text, consider dropping it. Perhaps the point is too minor to include.** Remember, the less you distract your readers, the easier it is for them to focus on the main points.

Tri-fold brochures pose special challenges for navigation

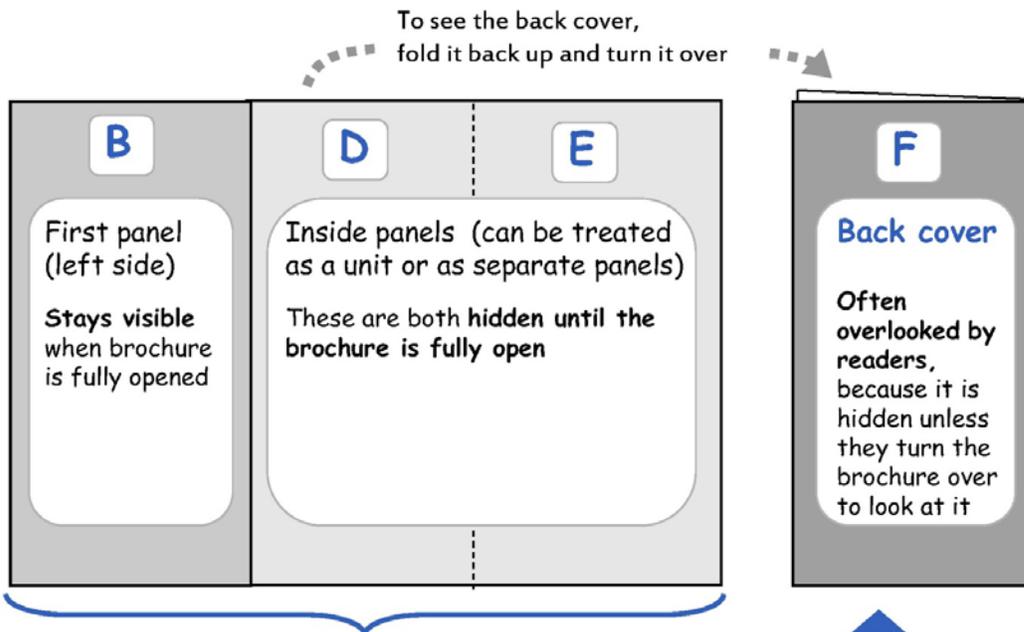
Figure

5-2-f. Why it is tricky to design a tri-fold brochure for ease of navigation.

Tri-fold brochures are very widely used, in part because they fit into literature racks. The diagrams below show why tri-folds that are folded in the conventional way tend to put extra burden on readers.



Design needs to be done with special care so that there's a **clear and obvious path through both panels**. Otherwise, they may compete for attention, and readers may miss part of the text.



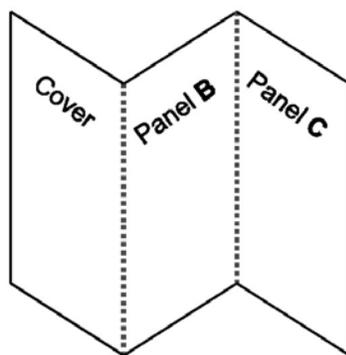
Design of the inside panels needs to work well with the design of the first panel B, so that they make sense together when the brochure is fully open and all three are visible.

The back cover is a **poor place to put crucial content**, because readers may miss it.

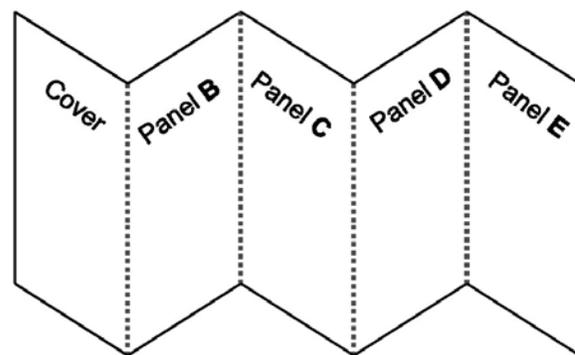
Consider an accordion fold instead

Depending on the material, you may be able to simplify navigation for your readers by designing a brochure that folds in a different way, such as using an accordion fold.

If you print on only one side of the paper, all panels stay visible when it's unfolded.



An accordion fold can work well for three or four panels.



If you use a large number of panels, the brochure will be quite wide when it's fully unfolded.



Source: Created as an example for this Toolkit.

Given the design and navigational challenges of the conventional tri-fold brochure, as shown above, think carefully about your readers before you use them:

- **Instead of automatically designing your material as a tri-fold brochure, consider other options.** There may be some better ways to package your material. Consider other shapes and sizes, especially those that offer a wider column width for improved ease of reading. For example, could you make the paper wider (or reduce the content) and fold it only once? The examples in Figure 5-2-b earlier in this chapter may give you some ideas.
- **If you must use a tri-fold, design it carefully:** Make sure that there is a clear and obvious path through the entire brochure. Don't put crucial content on the back cover or on the panel that is folded back when the brochure is fully opened. For a detailed example of addressing the navigational problems in a tri-fold brochure, see Toolkit Part 10, “*Before and after*” example: *Using this Toolkit's guidelines to revise a brochure.*

Maintain a consistent style and structure



Create an overall design for the material that has a clear and consistent style and structure.

For a clean and well-organized look, use a page grid and style sheets to guide your design. Line up your headings, blocks of text, lists, illustrations, and other design elements in a clear and consistent way. Keep the same style or “look” throughout the material.

When a layout is working well, readers find their way through it without conscious awareness or effort. They can focus on the content and main messages because there are no navigational barriers to distract them. To make your layouts work well, you need to work with your graphic designer to create an overall design that has a clear and consistent style and structure:

- **Clear and consistent structure.** Creating a neat and tidy arrangement of text and other elements on the page makes the material look well organized. Keeping the layout and look of the document consistent from page to page lends unity and makes the material easier to navigate.
 - **Makes it look well organized.** When headings, blocks of text, lists, illustrations, and other elements are lined up in a clear, strong, consistent way, the material looks “clean” and orderly and is easy to skim.
 - **Makes it more predictable.** Keeping the arrangement consistent from page to page makes the material much easier for readers to understand and use. Going through it becomes more predictable for readers, making them feel more comfortable and confident. Below, we explain how page grids are used to establish and maintain a consistent structure for your material.
- **Clear and consistent style.** Keeping the same design style or “look” throughout the material lends unity and avoids distracting readers from the key messages in your material. Many design features contribute to the overall look.

- **For example, it’s important to choose your fonts carefully and limit the number of fonts that you use** (see Guidelines 6.1, 6.2, and 6.3 in Toolkit Part 5, Chapter 3, *Guidelines for fonts, size of print, and contrast*).
- **Maintaining a consistent style of artwork and repeating key visual elements** also foster unity of design. For example, if you are using photographs or illustrations in your document, try to maintain a similar style throughout the document. For more about this, see Guideline 9.2 in Toolkit Part 5, Chapter 6, *Guidelines for using photographs, illustrations, and clip art*.

A page grid is a flexible tool for creating effective layouts

A **page grid** is like an invisible skeleton that forms the underlying structure of each page.

It’s a powerful, flexible tool for creating a tidy sense of order in your document.

Graphic designers use a page grid to establish and maintain consistent placement and strong alignment of text and graphic elements. A page grid marks the margins and columns of your document, imposing the same structure for every page. Typically, text and graphic elements are aligned to the edges of the grid, giving the pages a strong sense of structure and unity. Here is how it works:

- **Create a fixed number of columns.** You set up your page grid to have a fixed number of columns, such as three, four, five or more columns. The number of columns you use differs depending on the size and nature of the material and the amount of flexibility you need for the design you want to create.
- **To lend variety to your layout without sacrificing the underlying unity and tidy structure, you can combine the columns in different ways.** As shown in the examples in Figure 5-2-g below, the position of each column in your page grid remains the same throughout the document, but you can combine the columns in different ways from page to page.
- **The page grid controls alignment.** On each page, you use the columns (or combined columns) as the guide for aligning text and graphic elements. This gives a tidy sense of order to your document.

Figure

5-2-g. A page grid establishes consistent placement of text and design elements.

This top area is reserved for the main headings. If there is no main heading on a page, then this area is blank.

Bottom of the text for the main heading falls on this line.

On every page, there is this much space between the main heading and the regular text.

These two columns are used for the text and images.

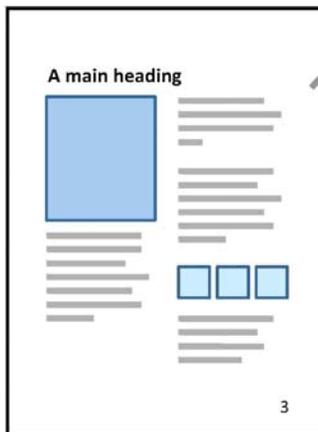
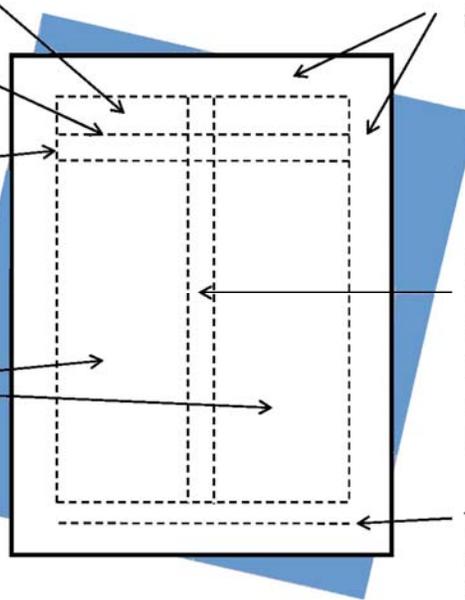
Although the grid imposes consistent alignment, there are many ways to combine text and images using the grid. One example of a layout that combines text and images is shown below.

Outside margins are the same on every page.

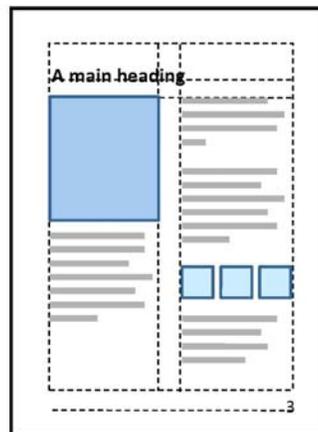
On every page, there is this much space between the two columns.

In each column, text is aligned on the left side ("left justification").

This bottom area is reserved for the page number or footer.



This version shows the underlying page grid.



How you can use page grids

Although you may not have the training and software capabilities of a professional designer, you can still make good use of page grids as a design tool. For example, you can:

- **Sketch a crude page grid to guide the initial design of a mockup of your materials.** When you are doing your mockup that shows the preliminary design for your print piece, sketch in a page grid to guide development of the layout. You can also ask your graphic designer to show you the page grid for your material and explain to you how it works.
- **Use a page grid as a tool to analyze effective layouts and improve your awareness of design.** When you see a layout that is attractive and effective, make a copy of it. Then, draw lines on the copy to reveal the underlying page grid. To do this, you will need to study how text and design elements are aligned on each page. Recreating page grids on published documents can help sharpen your sense of design and give you ideas about how to use page grids in your own materials.
- **Use a page grid as a tool to help identify and correct layout problems.** For example, suppose that you are not happy with the look of a page layout. Or perhaps you have learned that readers are having trouble navigating through the material. Draw the page grid on it, and study how the text and design elements are arranged on the grid:
 - **Is everything aligned** to the grid the way it is supposed to be? If not, fix it.
 - **Is there a way to rearrange the text and images** on the same grid that might make the layout more appealing and effective? Would it help to combine some of the columns on the page grid and use it in a different way?
 - **Does the page grid need revision** to give you more flexibility?



End notes

For excellent resources on overall design and page layout, see Figure 5-1-a in Toolkit Part 5, Chapter 1, *Tips for learning about design and working with design professionals*.

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