Inclusivity Through Documentation: Using Gestalt Principles and Plain Language to Create Effective Documents

Jennifer Turner and Jessica Schomberg
Minnesota State University, Mankato
#ARLD18
Where We Are

Map from http://www.pbs.org/circleofstories/
For more information, visit native-land.ca
Overview

• Instructional design & document design
• What accessibility concepts do you need to keep in mind?
  • Difference between accessibility and accommodation
  • Universal Design
• Design concerns (read our *In the Library with the Lead Pipe* article)
  • Gestalt Theory
  • Image selection
  • Plain language
• Group activity
• Accessibility & design tools
Instructional Design & Document Design

• What is being communicated?

• Who is consuming the information?
  • What do they need to know?
  • What are audience characteristics?

• Where and how will the information be consumed?

• What are the best tools for the job? How can you clearly communicate the information?

• When done, how did it work? How could it be better?
Document genres

• Training materials
• Proposals
• Policy statements
• Forms
• Web sites
• Research articles
• Press releases
• Cover letters and resumes
This work, "Visual Gestalt," is a derivative of "7 Laws of Gestalt" by Valessio used under CC BY 4.0, via Wikimedia Commons. "Visual Gestalt" is licensed under CC BY 4.0 by Jennifer Turner.
Poor Proximity

Improved Proximity

Images should be helpful!
Fonts matter

• Use 12-point font or larger
• Use familiar fonts
• Be consistent

This relatively easy for many people to read. (Calibri 20-point font)
This may be more difficult to read because it is small. (Calibri 9-point font)
This may be more difficult to read because it is unfamiliar. (Berlin Sans FB 20-point font)

Sans-serif fonts are generally recommended over serif fonts.
Plain Language and Accessibility

• Purpose of Plain Language

• Will users understand the language? Does the document highlight information that is important to them?
  • If you don’t know enough about your users to be able to answer those questions, find out! Demographic information, diverse focus groups, and surveys can all help you find out more about your patrons.
Plain Language Guidelines: Content

• Present the context before going into the details
• Use descriptive headers and sub-headers
  • Start headings with action verbs
  • Use questions instead of noun phrases
  • Be consistent within heading levels
  • Make liberal use of white space

• If using library jargon or acronyms, explain what it means each time it’s used*

Get a Library Card
  How do I get a library card?
  What can I do with a library card?
Reserve a Room
  What kinds of rooms are available?

04/27/18
Plain Language Guidelines - Words

You can use a library card to check out books.
OR
Library cards can be used to check out books.

Sentence structure

• Use short sentences and active voice
• Use subject-verb-object order
• Avoid embedded clauses and parenthetical statements
• Stay positive, avoid “not”
• Use everyday words
• Speak to the reader
• Draw a picture with your words – and possibly also with a picture, chart or table!
Plain Language Guidelines - Online

• Link language should describe what your reader will get if they click the link
• Use even shorter paragraphs and more headings than on paper
• Use descriptive section headings to help your reader navigate
• Header Styles are your friend
• Use alt-text for images
Version Control

• Add the date!
• Avoid multiple versions
• Avoid multiple versions in multiple locations
• Use archive folders, if needed
Editing Your Documentation

• What is missing? What is unneeded?
• Does it make sense to you? Does it make sense to other people?

Next step: Testing
• Accessibility for people with visual, motor, or cognitive impairments
• Readability
• Comprehensibility
Self-testing

Some usability tests can be conducted on your own.
• Start by questioning the purpose of everything in the document
• Use accessibility and design tools
Usability Testing

Get feedback from document users!

• Formal or informal
• Paraphrase testing
• Focus groups
• Task-based activities
“Library Quick Sheet” Before Usability Testing
“Library Quick Sheet” After Usability Testing
Document Redesign Workshop

• What is the core purpose of the document?
• What information is necessary to accomplish this purpose? Is there missing information? Extra information?
• Who is the audience? What do they care about?
• Is this the appropriate format for this information?
• Does the document use sound design principles?
• What changes are needed to improve accessibility and inclusivity?
Accessibility & Design Tools

• Microsoft Word accessibility checker
• Microsoft Word “speak” feature
• Microsoft Word styles
• Online color blindness simulators
• Online contrast checkers
• Invest in accessibility software
• Guidelines from other institutions
Microsoft Office Accessibility Checker

I Want ALL THE WORDS

Protect Presentation
Control what types of changes people can make to this presentation.

Inspect Presentation
Before publishing this file, be aware that it contains:
- Document properties and author’s name
- Presentation notes

Check for Issues
- Check the presentation for hidden properties or personal information.
- Check the presentation for content that people with disabilities might find difficult to read.

Check Accessibility
- Check compatibility for features not supported by earlier versions of PowerPoint.
MS Word Styles

- Help users of assistive technologies navigate
- Allow for standardization
- Ease design burden
- Customizable
# Online Color-Blindness Simulators

- **Type**: c
- **ELVL**: l
- **Form**: m
- **Comp**: mc
- **TriAr**: Tr
- **Desc**: a
- **FMUS**: c
- **LText**: n
- **DiSt**: s
- **Dates**: 1973

## Standard

**Scores**: 19870602

## Blue-blind/Tritanopia

**Scores**: 19870602

Image simulation source: [Coblis—Color Blindness Simulator](https://www.coblis.com/)
Ranganathan (1931) / Turner (2015)

Five Laws of Library Science
• Books are for use.
• Every reader his/her book.
• Every book its reader.
• Save the time of the reader.
• The library is a growing organism.

Five Laws of Document Design
• Design is for use.
• Every document its design.
• Every design its purpose.
• Save the time of the user.
• Documents are [should be] changeable organisms.
Discussion