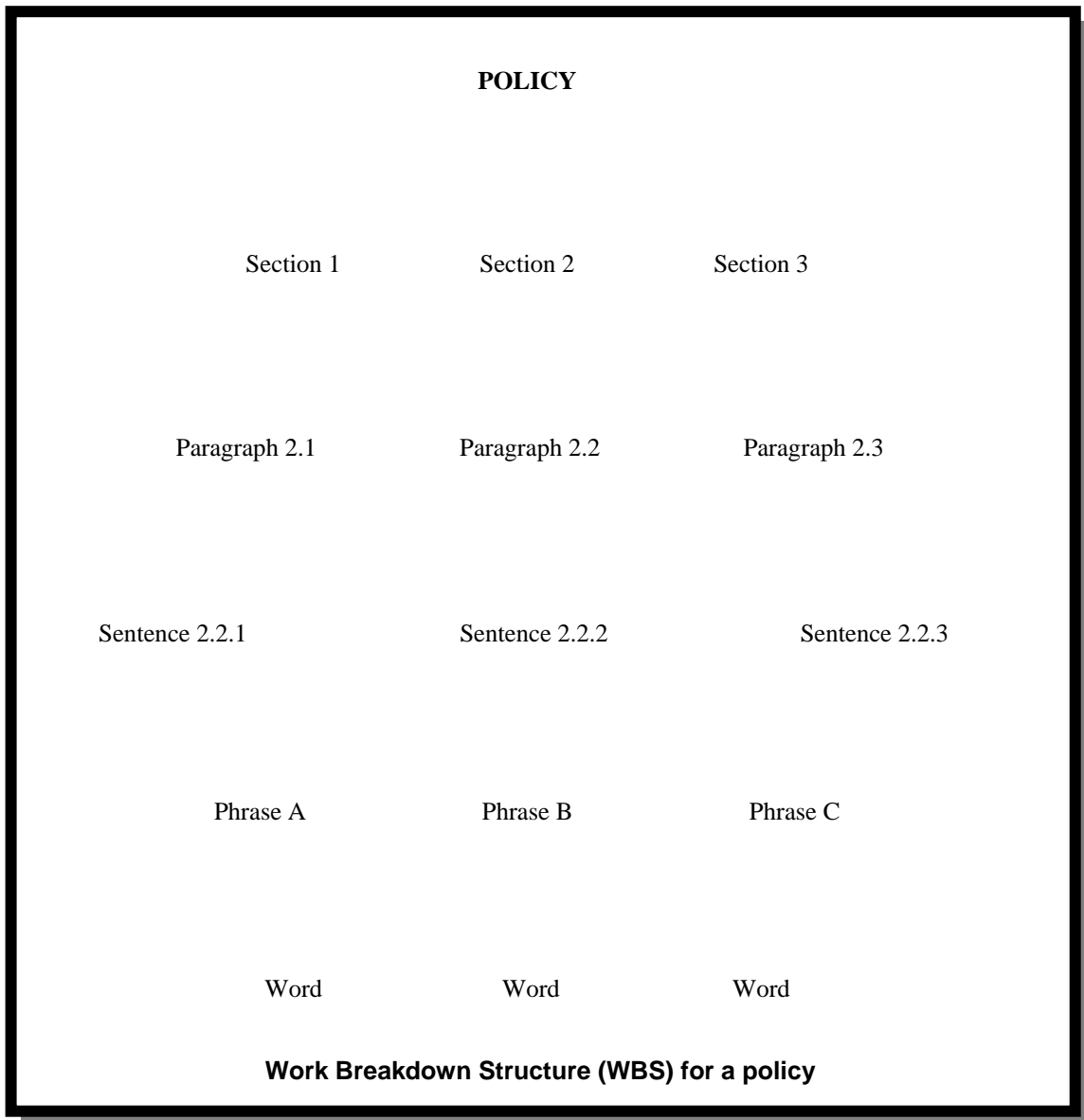


# Demystifying Policy – the WBS approach

George Clark (July 2002) for PPIC Workshop

<b>Demystifying Policy</b>	
<b>Step 1 = analysis</b>	<b>Step 2 = re-synthesis</b>
<b>Split the policy into its parts</b>	<b>Put the various parts together again</b>
Once you have understood the various parts, and how they fit together, then you will have understood the policy.	Think of a member of your target audience and re-write the policy in a way that will answer the questions that they ask.

It is best if you are systematic when you are analysing and re-synthesising. The concept of a work breakdown structure (WBS) can help. The idea is to split the one big task into many small tasks without losing sight of how they all fit together. The WBS is a powerful project management tool. If the problem is “How do you eat an Elephant?”, the solution is, “One mouthful at a time.”



# Digesting a Policy Document into Plain Language

George Clark for PPIC Workshop August 2002 [clark@srds.co.uk](mailto:clark@srds.co.uk)

Rewriting policy documents in plain language is as much an art as a science but there are some techniques and procedures that you can use to improve the quality of the product.

1. You must first read for understanding, and research for deeper understanding if this is necessary.
2. Having understood the thrust of the policy you have to visualize your target reader and write with him/her in mind.
3. The next, and most important task, is to have the authorities, and a sample of target readers, comment on your draft and then
4. rewrite, rewrite and rewrite until you have a story that does what it intends to do.

## ***Read for understanding***

1. If there is no detailed contents page then create one by listing all the paragraph headings
2. Use the contents page as a summary to develop an understanding of the thrust of the policy
3. Read each section (chapter) of the document and write a summary of its main points in your own words
4. Check to see if your understanding is the same as the one you developed from thinking about the contents page.

Notes:

- As you read the document you will find jargon words and abbreviations/acronyms that are not clear. Make a note of these and find out about them.
- Mark the margin of the document beside potentially 'quotable' sentences and paragraphs.
- If the document contains several contradictory lists then it helps to note the pages where they occur so that you can easily find, list and compare them and ask the authorities to say which version they prefer.

## ***Research for deeper understanding***

1. If the document frequently refers to other documents then read these to get a better understanding of the ideas in the main document, where they came from, and how they fit the 'bigger picture'.
2. It can be very useful to interview a range of officials who are associated with the Policy Document. This can help develop a better understanding of the background to the document and the shades of meaning and interpretation which it might contain. This is particularly important if the intention is to remain true to the tone and spirit of the original.
3. Sometimes the document will not sketch out the 'bigger picture', the interviews will not offer a suitable metacognitive framework<sup>1</sup>, and the topic of the document may not fall within your pre-existing fields of expertise. In such cases it is useful to read introductory texts on the subject matter and/or cruise the internet for useful and up to date thinking.
4. To make the text more attractive, informative, interesting and stimulating it is useful to add quotes, questions and explanations of concepts and jargon. You will have to gather and develop these in the process of researching and test them during the review process.

### **3-part structure for writing**

- tell them what your are going to tell them
- tell them
- tell them what you have just told them

## ***Write for a particular audience***

You have understood the thrust of the policy document and have listed its main points. The task now is to retell the story in a way that answers the questions and meets the needs of the intended audience. Who are you writing for and what will they want to know?<sup>2</sup>

<sup>1</sup> see the handout on *Poverty Reduction Strategies and STEEP Horizons*

<sup>2</sup> If the policy is a result of wide ranging consultations then you should be able to find lists of what ordinary people had to say about the topic.

1. Visualise your likely reader – male/female, old/young, rural/urban, degree of literacy, level of education and experience, race and religion etc
2. Use the journalist’s six questions (who, why, what, when, where and how<sup>3</sup>) to explore the topic from what you think might be your intended audience’s point of view
3. Design a contents page so that you will be answering the six questions in a logical order and at the same time offering the reader an executive summary of the story line.
4. Write the story using the new contents page as a guide.
5. Use a 3-part-structure (see box) wherever it seems relevant.

### **Test, rewrite, test, rewrite, rewrite, rewrite**

The secret of successful plain language writing is participatory user-testing, and rewriting.

1. Present your first draft to the authorities to make sure that you have captured all the main points and explained them accurately and with an appropriate tone and spirit.
2. Revise the first draft (a) as a result of feedback from the authorities and (b) by editing systematically using the Plain Language Rules as a checklist (see box)
3. Interview a range of ordinary people who have read the second draft and make notes about any problems they have with words, concepts, layout etc.
4. Revise the second draft (a) as a result of feedback from ordinary people and (b) by systematically editing using the Plain Language Rules<sup>4</sup> as a checklist.
5. Leave the third draft sitting for at least a day and then revise it by editing systematically using the Plain Language Rules as a checklist.
6. Leave the fourth draft sitting for at least a day and then revise it by editing systematically using the Plain Language Rules as a checklist.

#### **How to edit systematically**

Editing systematically involves scanning your document for one particular plain language feature at a time. For example:

- to eliminate jargon words
- to convert passive to active voice
- to make sure that all acronyms are spelled out
- to make negative statements into positive ones
- to break up long sentences

Notes:

By systematically using the techniques and procedures mentioned above you should be able to produce a fairly good plain language version of a policy document. The main attitudes required are humility and patience – you must not expect people to absorb whatever you happen to write carelessly and in a hurry. You will have to put a lot of time and effort into meeting the needs and tastes of your target readers.

The customer is always right.

If they haven’t understood it is because you didn’t explain it clearly enough

<sup>3</sup> See the handout on *Questioning Poverty*

<sup>4</sup> various sets of plain language rules are available on the internet – try [www.plainlanguagenetwork.org](http://www.plainlanguagenetwork.org)

## Design and Layout of Plain Language booklets

Once you are happy with the accuracy and readability of your plain language text you have to make it attractive to your readers. The goal is to make every page interesting to look at. You can do this by using a range of layout techniques and procedures.

### The basics

- Let your pages breathe. Don't crush all the words together so as to save space. Have generous margins and use some of the elements mentioned below to make white spaces on the page.
- Do not use a lot of different fonts. Use a 12 point serif font (eg Times Roman) for body text and a different one (possibly a sans serif one like Arial) for headings.
- Be miserly with **bold** and *italic*. Use them only occasionally to emphasize particular points. If you use them too much they lose their effect.
- Use bullet points for lists which do not have a logical sequence and numbers for lists that have a particular order. If the list has more than seven items then find a reason for splitting it into two sections.
- Use tables to present regularly repeated information that looks awkward when you write it as prose. But keep the tables simple (ie not too many columns or rows) because many people find them difficult to read.
- Try to limit your levels of paragraph headings to about three and make them distinctive and consistent (use the style command in Microsoft Word). They act as signposts through your text. You can edit them (format font, paragraph, borders and shading) so that they stand out clearly from the body text.

### The refinements

- Avoid single lines from a paragraph at the bottom of one page or the top of the next (widows and orphans). NEVER have a paragraph heading as an orphan at the bottom of a page. The latest versions of most word processors allow you to format fonts for expansion, condensing and kerning and to format paragraphs for line spacing. These features can usually help to get rid of widows and orphans.
- As much as possible begin a new section/topic/chapter at the top of a new page. You can use cartoons and quotations as 'fillers'.
- Footnotes and endnotes make your writing seem academic and unsophisticated readers may not know how to use them. Use text boxes when you feel the need to explain an idea but you do not want to break into the basic story line.
- You can use double or triple columns to reduce the distance the reader's eye has to travel. However, when there are elements (eg cartoons or tables) that cross the columns the reader might have difficulty following the flow of the text. For an unsophisticated audience it is best to keep the layout as simple as possible.

#### widow and orphan

A *widow* is the last line of a paragraph printed by itself at the top of a page. An *orphan* is the first line of a paragraph printed by itself at the bottom of a page.

### Special features

- A good picture is worth a thousand words. Illustrations and cartoons are easy ways to grab a readers attention and, if they are well made, they can promote understanding and stimulate deeper thinking.
- Carefully chosen quotations can also help to promote understanding and stimulate deeper thinking. There are three main types – those taken directly from the original document, those recording the voice of the people (from test readings, research reports, newspapers) and from other sources of literature. It is useful to carry a notebook with you at all times and to record quotations when you find them.
- If you have special sections at the end of the document (eg 'What the big words mean') you can use a different font or layout to make them stand out.

## Towards Plain Language – cutting out the padding

George G Clark, June 2002, [www.srds.co.uk](http://www.srds.co.uk)

Many official documents serve a diplomatic/political function and are therefore filled with words and phrases aimed at pleasing diplomats, politicians and the less astute ordinary people by weaving around the issues and sounding impressive. The poor person in the street, however, does not need or want the padding, s/he just wants to know what is *really* being said.

Converting a flowery speech into Plain Language involves dealing with one paragraph at a time. Highlight the main subject, (action) verb and object and ignore the adjectives and adverbs. The following example shows how a flowery medieval document can be converted into brutally short modern prose.

<p>Holding governance to account - The Declaration of Arbroath - 1320</p>	<p>This letter, sent to the Pope in 1320 to appeal for Scotland's independence, is one of the most famous documents in Scottish history. The nation had been excommunicated for continuing to war with England while Christendom was supposed to be on crusade against Islam. The declaration justifies this continuation in hostilities as a struggle for freedom. Since then it has become an edict on the nature of political freedom and the role of kingship in relation to the people of a nation.</p>
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<p><b>Declaration of Arbroath (1320) – translated from the Latin</b></p>	<p><b>Modern Summary</b></p>
<p>To the most Holy Father and Lord in Christ, the Lord John, by divine providence Supreme Pontiff of the Holy Roman and Universal Church, his humble and devout sons Duncan, Earl of Fife, Thomas Randolph, Earl of Moray, Lord of Man and of Annandale, Patrick Dunbar, Earl of March, Malise, Earl of Strathearn, Malcolm, Earl of Lennox, William, Earl of Ross, Magnus, Earl of Caithness and Orkney, and William, Earl of Sutherland; Walter, Steward of Scotland, William Soules, Butler of Scotland, James, Lord of Douglas, Roger Mowbray, David, Lord of Brechin, David Graham, Ingram Umfraville, John Menteith, guardian of the earldom of Menteith, Alexander Fraser, Gilbert Hay, Constable of Scotland, Robert Keith, Marischal of Scotland, Henry St Clair, John Graham, David Lindsay, William Oliphant, Patrick Graham, John Fenton, William Abernethy, David Wemyss, William Mushet, Fergus of Ardrossan, Eustace Maxwell, William Ramsay, William Mowat, Alan Murray, Donald Campbell, John Cameron, Reginald Cheyne, Alexander Seton, Andrew Leslie, and Alexander Straiton, and the other barons and freeholders and the whole community of the realm of Scotland send all manner of filial reverence, with devout kisses of his blessed feet.</p>	<p>Dear Sir</p>
<p>Most Holy Father and Lord, we know and from the chronicles and books of the ancients we find that among other famous nations our own, the Scots, has been graced with widespread renown. They journeyed from Greater Scythia by way of the Tyrrhenian Sea and the Pillars of Hercules, and dwelt for a long course of time in Spain among the most savage tribes, but nowhere could they be subdued by any race, however barbarous. Thence they came, twelve hundred years after the people of Israel crossed the Red Sea, to their home in the west where they still live today. The Britons they first drove out, the Picts they utterly destroyed, and, even though very often assailed by the Norwegians, the Danes and the English, they took possession of that home with many victories and untold efforts; and, as the historians of old time bear witness, they have held it free of all bondage ever since. In their kingdom there have reigned one hundred and thirteen kings of their own royal stock, the line unbroken a single foreigner.</p>	<p>We have lived in Scotland for a long time</p>
<p>The high qualities and deserts of these people, were they not otherwise manifest, gain glory enough from this: that the King of kings and Lord of lords, our Lord Jesus Christ, after His Passion and Resurrection, called</p>	<p>and are blessed in so doing through our patron Saint Andrew.</p>

<p>first to His most holy faith. Nor would He have them confirmed in that faith by merely anyone but by the first of His Apostles -- by calling, though second or third in rank -- the most gentle Saint Andrew, the Blessed Peter's brother, and desired him to keep them under his protection as their patron forever.</p>	
<p>The Most Holy Fathers your predecessors gave careful heed to these things and bestowed many favours and numerous privileges on this same kingdom and people, as being the special charge of the Blessed Peter's brother. Thus our nation under their protection did indeed live in freedom and peace up to the time when that mighty prince the King of the English, Edward, the father of the one who reigns today, when our kingdom had no head and our people harboured no malice or treachery and were then unused to wars or invasions, came in the guise of a friend and ally to harass them as an enemy. The deeds of cruelty, massacre, violence, pillage, arson, imprisoning prelates, burning down monasteries, robbing and killing monks and nuns, and yet other outrages without number which he committed against our people, sparing neither age nor sex, religion nor rank, no one could describe nor fully imagine unless he had seen them with his own eyes.</p>	<p>We are presently under vicious attack by the English.</p>
<p>But from these countless evils we have been set free, by the help of Him Who though He afflicts yet heals and restores, by our most tireless Prince, King and Lord, the Lord Robert. He, that his people and his heritage might be delivered out of the hands of our enemies, met toil and fatigue, hunger and peril, like another Macabaeus or Joshua and bore them cheerfully. Him, too, divine providence, his right of succession according to or laws and customs which we shall maintain to the death, and the due consent and assent of us all have made our Prince and King. To him, as to the man by whom salvation has been wrought unto our people, we are bound both by law and by his merits that our freedom may be still maintained, and by him, come what may, we mean to stand.</p>	<p>Our King is so far managing to defend us</p>
<p>Yet if he should give up what he has begun, and agree to make us or our kingdom subject to the King of England or the English, we should exert ourselves at once to drive him out as our enemy and a subverter of his own rights and ours, and make some other man who was well able to defend us our King; for, as long as but a hundred of us remain alive, never will we on any conditions be brought under English rule. It is in truth not for glory, nor riches, nor honours that we are fighting, but for freedom -- for that alone, which no honest man gives up but with life itself.</p>	<p>but should he decide to give in we will replace him.</p>
<p>Therefore it is, Reverend Father and Lord, that we beseech your Holiness with our most earnest prayers and suppliant hearts, inasmuch as you will in your sincerity and goodness consider all this, that, since with Him Whose vice-gerent on earth you are there is neither weighing nor distinction of Jew and Greek, Scotsman or Englishman, you will look with the eyes of a father on the troubles and privation brought by the English upon us and upon the Church of God. May it please you to admonish and exhort the King of the English, who ought to be satisfied with what belongs to him since England used once to be enough for seven kings or more, to leave us Scots in peace, who live in this poor little Scotland, beyond which there is no dwelling-place at all, and covet nothing but our own. We are sincerely willing to do anything for him, having regard to our condition, that we can, to win peace for ourselves.</p>	<p>If you can get the English off our backs</p>

<p>This truly concerns you, Holy Father, since you see the savagery of the heathen raging against the Christians, as the sins of Christians have indeed deserved, and the frontiers of Christendom being pressed inward every day; and how much it will tarnish your Holiness's memory if (which God forbid) the Church suffers eclipse or scandal in any branch of it during your time, you must perceive. Then rouse the Christian princes who for false reasons pretend that they cannot go to help of the Holy Land because of wars they have on hand with their neighbours. The real reason that prevents them is that in making war on their smaller neighbours they find quicker profit and weaker resistance. But how cheerfully our Lord the King and we too would go there if the King of the English would leave us in peace, He from Whom nothing is hidden well knows; and we profess and declare it to you as the Vicar of Christ and to all Christendom.</p>	<p>we could assist you in the fight against our common enemies in the east.</p>
<p>But if your Holiness puts too much faith in the tales the English tell and will not give sincere belief to all this, nor refrain from favouring them to our prejudice, then the slaughter of bodies, the perdition of souls, and all the other misfortunes that will follow, inflicted by them on us and by us on them, will, we believe, be surely laid by the Most High to your charge.</p>	<p>If you do not do something you will be part responsible for what happens.</p>
<p>To conclude, we are and shall ever be, as far as duty calls us, ready to do your will in all things, as obedient sons to you as His Vicar; and to Him as the Supreme King and Judge we commit the maintenance of our cause, casting our cares upon Him and firmly trusting that He will inspire us with courage and bring our enemies to nought.</p>	<p>Your (conditionally) obedient servants</p>
<p>May the Most High preserve you to his Holy Church in holiness and health and grant you length of days.</p>	<p>Lang may yer lum reek</p>
<p>Source of the original translation from the Latin:  <a href="http://www.bbc.co.uk/history/scottishhistory/independence/features_independence_arbroath.shtml">http://www.bbc.co.uk/history/scottishhistory/independence/features_independence_arbroath.shtml</a>            Modern Summary by <a href="http://www.banffshirehistory.co.uk">George Clark</a> of Portsoy (NW of Arbroath) <a href="http://www.banffshirehistory.co.uk">http://www.banffshirehistory.co.uk</a></p>	

"Once you recognise jargon as jargon you can then learn how each piece of jargon can be translated back into ordinary, everyday language."  
 (Dorothy Rowe (1997))

"If an expert cannot explain in ordinary language, he is either trying to mislead or he does not understand what he is talking about."  
 (Dorothy Rowe (1997))

"the description in plain language will be a criterion of the degree of understanding that has been reached"  
 (W Heisenberg, Physics and Philosophy)

"If you can't write your idea on the back of my calling card, you don't have a clear idea."  
 (David Belasco)

"Big men use little words; little men use big words."  
 (Anonymous)

"A man who uses a great many words to express his meaning is like a bad marksman who instead of aiming a single stone at an object takes up a handful and throws at it in hopes he may hit."  
 (Samuel Johnson.)

"Short words are best and the old words when short are best of all."  
 (Winston Churchill.)

"The adjective is the enemy of the noun."  
 (Voltaire.)

"Men of few words are the best men."  
 (William Shakespeare)

"If you can't explain something simply, you don't understand it well."  
 (Albert Einstein)

## Towards Plain Language – cutting out the padding (2)

George G Clark, June 2002, [www.srds.co.uk](http://www.srds.co.uk)

The text below is President’s Mkapa’s foreword to “Tanzania’s Development Vision 2025”. It contains 9 paragraphs and 669 words. As a first step in converting the article to Plain Language you have to decide the main thrust of each paragraph. Examples have been given for the first three paragraphs. Try summarising the remaining six paragraphs and write your ideas in the box. (Tip – underline the verbs in each sentence)

<p>We are standing at the threshold of the 21<sup>st</sup> Century, a Century that will be characterised by competition. It is clear, therefore, that it will be a Century dominated by those with advanced technological capacity, high productivity, modern and efficient transport and communication infrastructure and, above all highly skilled manpower imbued with initiative. If we are to be active participants in the global developments of the twenty-first century we must, as a Nation, find ways of improving and strengthening ourselves in all these areas.</p>	<p>We must find ways of being effective international competitors in the 21<sup>st</sup> century</p>
<p>In coming to terms with this challenge the people of Tanzania, led by their Government, recognised the need to prepare a New National Development Vision which will guide economic and social development efforts up to the year 2025. The objective of this Development Vision is to awaken, co-ordinate and direct the people's efforts, minds and our national resources towards those core sectors that will enable us attain our development goals and withstand and expected intensive economic competition ahead of us.</p>	<p>We recognised the need for a development vision to guide people</p>
<p>It is necessary, therefore, that this Development Vision is shared and supported by all Tanzanians. That is why we sought the views and consensus of a wide cross-section of our society during the formulation process. The draft Development Vision was discussed by various societal groups including Honourable Members of Parliament, all political parties, leaders of various religious denominations, women and youth organisations, chambers of commerce and industry, farmers, professional associations, renowned personalities in our nation's history and ordinary Tanzanians. A Development Vision 2025 formulated through such a process is an important pillar in building that level of national unity and cohesion needed to ensure economic development in an environment of peace, security and patriotism.</p>	<p>Everyone shared in developing the vision</p>
<p>The formulation of this Vision benefited from an in-depth assessment of our nation's history and direction. We made an evaluation of where we came from, where we are now, and where we want to go. We reviewed our politics, as well as our development planning framework and its implementation mechanisms. We have sought to learn from both our strengths and our shortcomings in these past initiatives.</p>	
<p>Development Vision 2025 has identified that kind of enabling environment that is essential for the nation to flourish economically, socially, politically and culturally. It has taken into account expected changes and trends in the world of tomorrow. The implementation of the Vision will have to include developing Tanzania's position vis a vis those changes, and the need to deal with them through hard work, initiative, skills, as well as to make use the many opportunities that will appear and the resources available in our country.</p>	
<p>Determination and discipline in planning and implementation is the key to success. In reaching a national consensus on this Vision, we have issued a declaration of our determination to disentangle ourselves form the scourge of poverty. The task before us, therefore, is for each one of us in our different roles in order to achieve the objectives we have set for ourselves. Ministries and other government institutions, the private sector, non-governmental organisations civil society, co-operative societies, villages and all social groups must direct themselves to contributing towards effective implementation of the objectives of this Vision.</p>	

<p>Peace, stability and security of citizens and their property constitute a fundamental and necessary environment for development. Without these prerequisites, this Vision will be meaningless and no development eschew anything which can divide Tanzanians, such as on the basis of religion, tribe, race, gender or place of origin. It is also the responsibility of each one of us to isolate and censure anyone who entertains, promotes or nurtures disrespect, disharmony, hatred and mistrust in our country. I believe that the majority of Tanzanians are patriotic people of integrity, ready to come together to fight these vices.</p>	
<p>I am confident that with the unity which we already have as a Nation, we will succeed in the implementation of this Vision. What can be done today should not wait for tomorrow.</p>	
<p>God bless Tanzania and abundantly provide us with the strength and capacity to implement our Vision.</p>	

## Towards Plain Language – when lists are better than sentences

George Clark, June 2002. [www.srds.co.uk](http://www.srds.co.uk)

The box gives a group of sentences describing the expected outcomes of a project. To convert this to a plain language list involves the two steps which are demonstrated below.

### Expected Outcomes in the Common Property Resource (CPR) management project

Building on a combination of recent research advances in the field of CPR management, this program will strengthen networks of African researchers and land professionals, to promote exchange of experience, dialogue and analysis, and identify ways of ensuring that local practice better informs legal reforms and policies regarding CPRs. At the end of the project, it is expected that a range of important actors in sub-Saharan Africa will better placed to understand the range of policy option regarding CPR management, and the importance of promoting local institutional development as a means to ensure more effective and equitable management. Equally, it is expected that the program will generate an interactive debate through its websites and range of other outputs, to strengthen arguments in favour of collective ownership of these resources, to ensure broader availability for poorer groups. This is of increasing importance, given global pressures in favour of economic liberalisation, land titling and privatisation of land and natural resources.

### Highlight the **action verbs** and *associated phrases*

Building on a combination of recent research advances in the field of CPR management, this program will **strengthen networks** of *African researchers and land professionals*, to **promote exchange** of *experience, dialogue and analysis*, and **identify ways** of *ensuring that local practice better informs legal reforms and policies regarding CPRs*. At the end of the project, it is expected that a range of *important actors in sub-Saharan Africa* will **better placed to understand** the *range of policy option regarding CPR management*, and *the importance of promoting local institutional development* as a means to ensure more effective and equitable management. Equally, it is expected that the program will **generate an interactive debate** *through its websites and range of other outputs*, to *strengthen arguments in favour of collective ownership of these resources*, to *ensure broader availability for poorer groups*. This is of increasing importance, given *global pressures in favour of economic liberalisation, land titling and privatisation of land and natural resources*.

### List and group the points using **bold** to highlight the main actions.

1. **Strengthened networks** of African researchers and land professionals which:
  - 1.1. promote exchange of experience, dialogue and analyses
  - 1.2. identify ways of ensuring that local practice better informs legal reforms and policies regarding CPRs
2. **Better understanding** among important actors in sub-Saharan Africa concerning:
  - 2.1. the range of policy options regarding CPR management
  - 2.2. the importance of promoting local institutional development as a means to ensure more effective and equitable management
3. **Generation of interactive debate** through websites and other outputs to:
  - 3.1. strengthen arguments in favour of collective ownership of these resources
  - 3.2. ensure broader availability for poorer people
  - 3.3. increase awareness of global pressures in favour of economic liberalism, land titling, and privatisation of land and natural resources