

Appendix B

This Appendix gives you a version of the Guide Checklist that is ready to copy and use in an actual assessment.

Please see Chapter 5, *The Guide Checklist for assessing print materials*, for information about the Checklist and how to use it.

Guide Checklist for assessing print materials

Name of material being assessed: _____

Name of reviewer: _____ Date: _____

Guide Checklist Part A: DESCRIPTION

The items in sections 1 through 4 below are open-ended. They describe the print material, its purpose, the intended audience, testing and evaluation. See Chapter 5, *The Guide Checklist for assessing print materials*, for information about this checklist and how to use it.

This form gives the page number in the Guide where each Checklist item is discussed.

1

Purpose of the print material

- 1.1 What is the purpose of the print material — what do you want the reader to know or do? *See page 127*

2

Description of the material (type of material, method of distribution, alternate formats, companion materials)

- 2.1 What type of print material is it? *See page 128*

Is this material: draft of new material
 revision of previously published material

How will it be used? (on-going reference, one-time use, etc.)

2.2 How and when is the print material being distributed and publicized?
see page 128

2.3 Are there other materials or personal assistance that go with this print material?
see page 129

- No
- Yes -----▶ what kinds?

2.4 Is the material available in alternative formats for non-readers and people with vision loss? *see page 130*

- No
- Yes -----▶ what kinds?

3 Describing and segmenting your intended audience

3.1 What research has been done to learn more about the intended audience, including their information interests and needs? *see page 130*

3.2 What are the literacy skills of the intended audience?
see page 131

3.3 What are the language translation needs of the intended audience?
see page 132

3.4 What are demographic and personal characteristics of the intended audience (age, sex, race, ethnicity, education, income, occupation, country of origin, geographical location, health status, etc.)? *see page 133*

3.5 What are the cultural, behavioral, and psychological characteristics of the intended audience (customs and traditions, health habits and lifestyle, media exposure, attitudes, values, etc.)? *see page 133*

4

Testing and evaluation

4.1 What testing have you already done to get your audience's reaction to the print material, and what did you learn from **it**? What additional testing do you plan?
See page 134

Testing that has been done: _____

What was learned: _____

Is additional testing planned?

- No
- Yes -----▶ what kinds? What will be the focus?

4.2 How will you judge the effectiveness of the print material?
see page 135

Guide Checklist Part 8: ASSESSMENT

Use the items in this part of the Checklist to assess your print materials.

- *"Yes."* A "Yes" answer means that the document substantially meets the criteria for the Checklist item.
- *"Needs improvement."* If you mark this answer, add comments that tell what kinds of improvement are needed.
- *"Not sure."* If you mark this answer, add comments that tell what kinds of improvement are needed.
- *"Not applicable."* The Checklist is a detailed tool that covers a wide range of attributes. Some things it asks about may not apply to your print materials. For example, if your document is in black and white, you would mark *"not applicable"* for all items in the section that covers use of color.

5

Content

5.1 Is the purpose of the material immediately obvious to the reader (clearly stated in the title, on the cover, or in the introduction)? *see page 143*

- | | |
|--|-----------|
| <input type="checkbox"/> Yes | Comments: |
| <input type="checkbox"/> Needs improvement | _____ |
| <input type="checkbox"/> Not sure | _____ |
| <input type="checkbox"/> Not applicable | _____ |
| | _____ |

5.2 Is the information concrete and action-oriented? *see page 146*

- | | |
|--|-----------|
| <input type="checkbox"/> Yes | Comments: |
| <input type="checkbox"/> Needs improvement | _____ |
| <input type="checkbox"/> Not sure | _____ |
| <input type="checkbox"/> Not applicable | _____ |
| | _____ |

5.3 Is the information limited to an amount that is reasonable for the intended readers?
see page 147

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

5.4 Is the information accurate and up-to-date? *see page 148*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

5.5 Does the content show awareness of and respect for diversity, and use culturally-appropriate words and examples?
see page 149

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

6

How content is sequenced, grouped, and labeled

6.1 Does the sequence and organization of information make sense to the intended audience (matches their logic and experience)? *see page 153*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

6.2 Does the material give people the background or context they need to understand new information? *see page 156*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

6.3 Is the information grouped into meaningful segments or sections of reasonable size? *see page 159*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

6.4 Does the material use headings, subheadings, or other devices to signal what's coming next? *see page 160*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

6.5 Are labels for sections, headings, and subheadings clear and informative to the intended audience? *see page 160*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

6.6 Does the material emphasize and summarize the main points? *see page 162*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

7

Writing style

7.1 Is the material written primarily in the active voice and in a conversational *style*?
see page 163

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

7.2 Is the reading level of the document appropriate for the intended audience?
see page 165

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

7.3 Are the words and sentences generally short, simple, and direct without being "choppy" or sacrificing cohesion and meaning? *see page 166*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

7.4 When you use technical terms, are they clearly explained with helpful examples? *see page 170*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

8

Engaging, motivating, and supporting the reader

8.1 Does the material have a friendly and positive tone? *see page 172*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

8.2 Does the material use devices to engage and involve the reader-such as & A, true-or-false, problem-solution, stories, dialogues, and vignettes?
see page 174

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

8.3 Are health statistics and similar data matched closely to the intended audience and community? *see page 176*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

8.4 Is information and advice linked to a source that intended readers find believable and trustworthy? *see page 177*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

8.5 Is the "how to" advice specific, urging behavior that is feasible and culturally appropriate for the intended audience? *see page 178*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

8.6 Does the material tell how and where to get help or more information? *see page 179*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

8.7 Does the material identify the organization that produced it, and include a publication date? *see page 179*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

9

Overall design and page layout, organization and ease of "navigation"

9.1 Does the size, shape, and general look fit with the purpose of the material? *see page 196*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

9.2 Does the material look appealing at first glance (uncluttered pages with generous margins and plenty of white space; something to catch the eye but not confuse it)? *see page 197*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

9.3 Is the way to "navigate" through the document immediately obvious to the intended audience? *see page 198*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

9.4 Are explanatory illustrations, diagrams, tables, charts, and graphs clearly labeled, and placed very near the text that introduces them? *see page 199*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

9.5 Are headings, blocks of text, lists, illustrations, and other elements lined up in a clear, strong, consistent way? *see page 199*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

9.6 Does the graphic design use contrast, indentation, bullets, and other devices to signal the main points and make the text easy to skim? *see page 204*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

9.7 Are bullets used effectively in terms of size, shape, spacing, and color?
see page 206

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

9.8 Does the overall design seem unified and consistent from page to page in its layout? *see page 206*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

10

Type style, size of print, and contrast with paper

10.1 Does the document use an effective combination of readable type styles to get good contrast between the text and the headings and titles?
see page 206

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

10.2 Is the type large enough, and the spacing between lines loose enough, for easy reading? *see page 208*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

10.3 Does the text use capital letters only when needed grammatically (no text in “*all-caps*”)? *see page 210*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

10.4 Does the document emphasize text by restrained use of italics, bolding, or devices like contrast in size or color accents (no underlining, no all-caps text)? *see page 210*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

10.5 Are lines of text an appropriate length for easy reading (no more than about five inches, set in columns if paper is wide, and no "wrapping" of text in awkward ways)? *see page 211*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

10.6 Is the right margin left uneven ("ragged right"), rather than forcing it into a straight edge on the right ("fully justified"), which can be harder to read? *see page 212*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

10.7 Does the text avoid splitting words across two lines? When headings take more than one line, does the break between lines reflect natural phrasing and avoid leaving a single word by itself on the second line? *see page 213*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

10.8 Does the document avoid printing text on shaded or patterned backgrounds or on top of photographs or illustrations? *see page 213*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

10.9 Is the document very restrained in any use of "reversed out" text (light-colored text on a dark background)? *see page 215*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

10.10 Is there enough contrast between the printed text and paper to be able to read everything easily (black text on white non-gloss paper works best)? *see page 216*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

11

Use of color

11.1 Are the particular colors chosen appealing to the intended audience and free from unwanted connotations or problematic cultural significance?
see page 216

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

11.2 Is color used sparingly for greatest impact, avoiding "color overload"?
see page 217

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

11.3 Is color used in a consistent and deliberate way to enhance the meaning and impact of the key messages? *see page 218*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

11.4 Do the particular colors chosen work well from a design standpoint (including for people who are color blind)? *see page 219*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

12

Tables, charts, graphs, and diagrams

12.1 Are tables, charts, graphs, diagrams, and explanatory illustrations clearly labeled and carefully explained, using examples, prominent legends, and step-by-step instructions? *see page 220*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

12.2 Do tables and charts include as few vertical and horizontal lines as possible to avoid a cluttered look? *see page 221*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

12.3 Have tables, charts, graphs, diagrams, and explanatory illustrations been pretested with the intended audience for comprehension and cultural acceptance?
see page 221

- Yes
 - Needs improvement
 - Not sure
 - Not applicable
- Comments: _____

12.4 Are matrix formats (charts with rows and columns) kept as simple as possible and used with great caution for lower literacy audiences?
see page 222

- Yes
 - Needs improvement
 - Not sure
 - Not applicable
- Comments: _____

13 Photographs, illustrations, and symbols

13.1 Are photos, illustrations, symbols, patterns and other visuals related to the information presented and used to reinforce key messages? *see page 226*

- Yes
 - Needs improvement
 - Not sure
 - Not applicable
- Comments: _____

13.2 Are the people and activities shown in photos or illustrations contemporary and representative of the intended audience in their demographics, physical appearance, behavior, and cultural elements? *see page 228*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

13.3 Are the photos, illustrations, and other images culturally sensitive and free from unwanted connotations or problematic cultural significance? *see page 236*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

13.4 Are the photos, illustrations, and other images simple and free from clutter and distracting detail? *see page 237*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

13.5 Are photos, illustrations, and other images consistent in style for a unified look?
see page 239

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

13.6 Are the facial expressions and body language of people in photos, illustrations, and other images appropriate to the situation and appealing to the intended audience? *see page 240*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

13.7 Do photos and illustrations have a high quality professional look (the images themselves, cropping, reproduction in the document)? *see page 242*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

13.8 Does the document avoid using cartoons, humor, and caricature (which may be understood or offensive)? *see page 243*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

14

Translation into other languages and adaptation for non-readers and people with vision loss

14.1 Is translation done for meaning and ease of reading, avoiding awkwardness of literal translation from English? *see page 249*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

14.2 Do translated versions of the document meet all the other guidelines for writing style, document design, cultural appropriateness, etc.? *see page 255*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

14.3 Does each document tell readers how to get alternate versions in other languages or alternative formats for those with vision loss? *see page 260*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

14.4 Is the language and date of the translated version identified by name in English somewhere on the document, for convenience of those who distribute it and speak only English? *see page 262*

- Yes
- Needs improvement
- Not sure
- Not applicable

Comments:

