Creating case studies about using ISO's plain language standard: a step-by-step guide

Purpose of this guide

Case studies are a useful tool to demonstrate the value of applying a standard or a process. Creating a case study that illustrates your experience using the ISO plain language standard serves several purposes:

- It highlights the benefits and effectiveness of the standard in your context.
- It helps you arrange approval for your organization's next plain language project.
- It will expand your resumé or CV.
- It will help you promote your services.

This step-by-step guide is designed to help organizations, teams, and individuals to create a case study. The guide will help you do these 2 things:

- identify and implement a project using the principles and guidelines of the ISO plain language standard, and

- create a case study based on the results of the project.

Step-by-step guide

There are 2 examples provided after this section, which illustrates each of these steps.

Remember that each case study will have its own unique requirements and may need additional or fewer steps or considerations. You can adapt this step-by-step guide to suit your specific needs and objectives when creating case studies about using the plain language standard.

If this is the first time that you are implementing plain language in your organization, it is likely best to start with a small project, for example revising a key employee document into plain language. Align your project with the resources that are available to you. This will ensure that the project is realistic and easy to achieve.

Step 1: Purchase the standard

Scan the QR code to purchase the standard.

 https://www.iso.org/standard/78907.html

2

Step 2: Identify a project

Step 2.1: Define the challenge or problem

Identify a communication challenge or problem that your organization, your team or your client's organization is currently facing. This could involve overusing complex language between departments, confusion among consumers/citizens or other users, low compliance rates, or any other issues that the standard may address.

Step 2.2: Gather information

Collect relevant information about the communication challenge or problem. This may include previous documentation, reports, user feedback and complaints, or any other data that can help you establish a baseline. Analyse it to see relevant patterns that you can address using the standard.

Step 2.3: Identify the purpose and scope

Define the purpose and scope of the project. Ask the following questions:

- What is the aim of the project? What do we want to achieve?
- Who is the target audience(s)?
- What will we focus on?

Your project may include one or several outcomes, such as these:

- creating documents for consumers to understand a particular process,
- rewriting existing key document or series of related documents, and
- creating a style guide based on the standard to ensure consistency within your organization.

Clearly define the scope of your project, to ensure it remains focused and relevant.

Step 3: Implement the project

Step 3.1: Describe the plain language solution

Use the standard to describe how you will address the problem or challenge you identified. Ensure that you focus on all 4 principles of the standard when designing your solution.

Step 3.2: Develop an implementation plan

Before you start with the project you need to plan. Think about the resources you need to implement the project. For example, think about the budget, skills, organizational processes, documents, and technology needed. Think about who will need to be consulted about the new document and who may need to sign it off. Assign roles and responsibilities to ensure individuals and teams are held accountable for certain actions.

Ensure you have measurable indicators in place at the start of your project to understand the impact of using the plain language standard. This means you should be able to count, analyse or test the change you want to see. Examples could be more forms completed, fewer queries submitted, increased sales, or higher understanding or compliance.

You can consider qualitative and quantitative data.

- Quantitative data means things you can count like numbers and statistics. This can include measurable improvements such as increased comprehension rates, reduced errors or enquiries, or enhanced user satisfaction.

- Qualitative data captures the things people said that allow you to explore their experiences further. This can include things like feedback on a document that tells you how it can be improved.

Version 6, 19 January 2024

Step 3.3: Implement, monitor and adapt the plan

Ensure your implementation process is flexible to allow you to identify and adapt to any challenges.

Consider the following:

- Is something not working well? What can you do to overcome this?
- Has something happened that you did not anticipate?
- How can you make sure that these challenges don't compromise the project?
- Can these challenges improve outcomes?
- What lessons have you learned from this?

Version 6, 19 January 2024

Step 4: Create the case study

Step 4.1: Present the results

Share the outcomes and results of implementing the ISO plain language standard. Highlight the significance of using the standard and its impact on the organization and the target audiences of the project, even if it is just initial observations or feedback.

Step 4.2: Include real-life examples

Support your case study with real-life examples that illustrate the benefits of using the standard. Here are some examples:

- before and after comparisons of documents,
- user testimonials or success stories that highlight the positive experiences and outcomes, or
- a story about how people responded to using the standard.

Step 4.3: Document and share the case study

Compile your case study into a short document of no more than 500 words. Use plain language principles in the presentation of the case study itself.

Send the case study to the International Plain Language Federation (IPLF) so that they can share what you learned on their website and on social media. Sharing with stakeholders, organizations, and individuals means that many people can benefit from your insights and lessons learned.

Version 6, 19 January 2024

Examples

Steps	Example 1: Small project Conversion of IT set up brochure for new employees	Example 2: Large project Plain language Covid-19 communication
Step 1: Purchase the standard	Standard purchased July 2023	Standard purchased July 2023.
Step 2.1: Define the challenge or problem Identify the communication challenge or problem that your organization, your team or your client's organization is currently facing.	IT department at organization Y is inundated with queries from new employees about how to set up and sign onto their email account and use the shared folders. Queries from new employees equate to approximately 10% of all queries received, with 48 calls per month taking 12 hours to deal with (average 15 mins per call).	The spread of Covid-19 continued within vulnerable communities, with hospital admission rates rising in the southeast of XYZ. Now that mandated public health orders have stopped, there are low compliance rates with suggested isolation times for those infected.
Step 2.2: Gather information Collect relevant information about the communication challenge or problem.	Data shows that new employees contact the IT help desk with these queries at least 1.5 times on average within their first two weeks. New employees' feedback indicates that the handouts are too technical and assume a high level of IT knowledge.	Limited Covid-19 information is available in an accessible format for multicultural communities. Information sourced on the internet is out of date and complex. Feedback from our multicultural community champions is that there is a lack of simple processes to follow. Our communities also believe that those infected with Covid-19 can still socialize outdoors. Information and misinformation from friends and family overseas is often sourced via Facebook. Hospital admission rates among multicultural communities, particularly those from refugee backgrounds, are twice the rate of those from English-speaking backgrounds.

Version 6, 19 January 2024

Steps	Example 1: Small project **Conversion of IT set up brochure for new employees**	Example 2: Large project **Plain language Covid-19 communication**
Step 2.3: Identify the purpose and scope Define the purpose and scope of the project. Clearly define the scope of your project to ensure it remains focused and relevant.	We decided to focus on using the ISO Plain Language Standard to help us to create a revised IT set up brochure for new employees. It will have simple and clear instructions so they can easily find the information they need, understand the information and use it to successfully set up their equipment on their own.	Applying the standard to available information about Covid-19, we identified 2 documents to develop: "Symptoms" and "Staying safe." Target audience was multicultural communities in our catchment. This involved rewriting the official public health information with intelligence from the community, to identify any risks related to their cultural practices.
Step 3.1: Describe the plain language solution Use the standard to describe how you will address the identified problem or challenge. Ensure that you focus on all 4 principles of the standard when designing your solution.	**Principle 1: Readers get what they need (relevant)** Employees need to set up their email accounts and shared folders within the first week, so our brochure contained information to complete these 2 tasks **Principle 2: Readers can easily find what they need (findable)** We used clear and meaningful headings, sub-headings and images (screenshots with highlights) to help new employees work through the set-up with ease. **Principle 3: Readers can easily understand what they find (understandable)** We removed technical and unfamiliar terms and explained terms they needed to know. We used shorter sentences and dot points / numbered steps.	**Principle 1: Readers get what they need (relevant)** We produced 2 documents: one to remind readers of the symptoms of Covid-19 and one to advise readers of safe practices. This includes safe cultural practices (such as safe picnicking, safe worshipping, etc). The documents were translated into multiple languages. **Principle 2: Readers can easily find what they need (findable)** The documents were produced in simple brochure design and format. Sub-headings were included to ensure the readers (many with limited literacy) could easily find the information they need. **Principle 3: Readers can easily understand what they find (understandable)**

Version 6, 19 January 2024

Steps	Example 1: Small project **Conversion of IT set up brochure for new employees**	Example 2: Large project **Plain language Covid-19 communication**
	Principle 4: Readers can easily use the information (usable) The information was provided on the new employees' first day with their new laptop. It enabled new employees to set up their laptops with ease but also provided the IT help desk number if they had any problems.	Plain language was used throughout the documents and the documents were tested with multiple communities to ensure they could be easily understood. A cultural perspective was also overlaid with the documents to ensure language was culturally appropriate and would be understood. **Principle 4: Readers can easily use the information (usable)** The information was provided to enable readers to undertake safe covid practices while still enjoying the freedom that the downgrading of the pandemic promised. It was targeted at keeping themselves and their loved ones safe while adopting some simple safeguards. The brochures were handed out with free facemasks at community events.
Step 3.2: Develop an implementation plan Before you start with the project you need to plan.	The IT support officer was given the task of applying the ISO standard to produce the new employee brochure. The percentage of total calls, plus the number and length of calls from new employees to the help desk, were measured for 2 months after the release of the brochure and compared to baseline.	A project plan was developed and implemented, and a plain language project manager was assigned. Metrics were developed and measured at the start of the project. This included measuring satisfaction with the existing information available and the plain language versions via survey. We also decided to speak to community members and our community champions to gather their opinions and experiences.

Version 6, 19 January 2024

Steps	Example 1: Small project Conversion of IT set up brochure for new employees	Example 2: Large project Plain language Covid-19 communication
Step 3.3: Implement, monitor and adapt the plan Ensure implementation processes can identify and adapt to any challenges.	In preparing the brochure for employees the IT support officer found some functions and weblinks in the organisation that were not working properly or were outdated. This required other departments to get involved and fix these issues which delayed the delivery of the project. Lesson learned: involve the departments or teams that our project aligns with early in the process.	Ideally the plain language brochure would be finalised in English first and then translated as translation costs can be very expensive. This created an issue with community testing amongst culturally diverse communities as we could only use bilingual community testers with a reasonable understanding of the English language. It can be argued that this is not representative of the audience. The project team decided to include some community testing of the finalized translated versions to confirm understanding (for a sample size of 2 members of each of 3 communities). This process did increase costs slightly but as the testing by bilingual communities was so comprehensive community members were pleased with the final products.
Step 4.1: Present the results Share the outcomes and results of implementing the ISO plain language standard.	Calls relating to the set-up of email accounts and shared folders were had these improvements: ● These calls were reduced from 10% to 3% of the total calls received by the help desk. ● They dropped from 48 to 14 calls per month. ● The calls were shortened on average from 15 minutes to 3 minutes because new employees who called could work out most of what they needed to do.	Our community champions assessed the official public health documents versus the plain language (PL) documents with a sample of 10 members of their communities (50 community members in total across 5 cultures). On a scale of 1 (poor) to10 (excellent), they rated both documents.

Version 6, 19 January 2024

Steps	Example 1: Small project Conversion of IT set up brochure for new employees	Example 2: Large project Plain language Covid-19 communication
	Total IT staff time involved in handling calls reduced from 12 hours to 42 minutes a month.	**<u>Symptoms</u>** 		Relevant	Find	Understand	Use
---	---	---	---	---
Official public health information	4	2	6	3
PL resources	8	8	10	8 | **<u>Staying safe</u>** |	Relevant	Find	Understand	Use
---	---	---	---	---
Official public health information	1	1	4	1
PL resources	10	9	10	7	 Across all domains the plain language documents rated well above the official public health information. It is too soon to tell if this will impact behaviour change and hospital admissions.
Step 4.2: Include real-life examples Support your case study with real-life examples that	A sample of new employees were interviewed, and all reported a positive experience with the set-up of their laptops. A couple of minor edits were recommended to the information.	User testimonials from community members: "I had no idea that COVID was still dangerous. I thought it was finished."

Version 6, 19 January 2024

Steps	Example 1: Small project **Conversion of IT set up brochure for new employees**	Example 2: Large project **Plain language Covid-19 communication**
illustrate the benefits of using the standard.	"It was a great brochure, and I could easily set up my laptop on my first day. It felt like I got off to a great start."	"I knew some people were still getting sick, but I was ignoring it. I didn't want to go back to being in lock-down. I hadn't realised that there were simple things I could still do to stay safe." "The documents are so easy to understand. I know what to look out for and how to stay safe." "There are measures we can put in place with our worshippers to keep them safe. There are practical things we can do."
Step 4.3: Document and share the case study	This could be written up in a few paragraphs to demonstrate the great outcomes from this small case study.	This study could be written up as a comprehensive report or in a few paragraphs. A potential option would be to include a video to showcase the testimonials and experiences of users. This would then be shared with the IPLF for their website and for social media posts to showcase this work.

Please note: When we load your case study to the IPLF website, the following paragraph will appear at the start of your case study. This statement provides context for those who download and share the case studies.

Introduction

This case study is published by the International Plain Language Federation (IPLF) to provide a real-world example of how organizations are implementing the ISO 24495-1 plain language standard.

You are free to share this information, but if you reference it in a publication, please cite the website of the International Plain Language Federation. The content is the copyright of the authoring organization and the IPLF, who developed the case study template. For more information, contact chair@iplfederation.org.