Essential writing skills

Virtual program

learner workbook

plan • think • write • review

Queries

Please direct questions or suggestions about the learning materials to info@petersenink.com.au

Copyright

Please direct questions about copyright and reproducing the materials to info@petersenink.com.au

Version control

Version	Date	Author	Description
1.0	26 September 2022	Paul Petersen	Creation

Contents

Introduction

Welcome to our online *Essential writing skills* course. This course is for people who write documents that support action and decision. It will help you write efficiently and persuasively.

Learning objectives

After completing this program, you will be able to:

• develop content that is relevant to your readers

• use plain English to improve readability

• review documents for content and clarity.

Overview of program

		Topics/courses	Duration
Week 1	Tutorial 1	Introduction to program	90 minutes
Week 2	Self-paced online courses	*Purpose and planning* *Spotlight on structure*	2 to 3 hours
	Tutorial 2	Substance and structure	90 minutes
Week 3	Self-paced online courses	*Words that work* *Readers and readability*	2 to 3 hours
	Tutorial 3	Plain English and readability	90 minutes
Week 4	Self-paced online courses	*Sensible sentences* *Effective editing*	2 to 3 hours
	Tutorial 4	Active voice and editing	90 minutes

Self-paced online courses

The self-paced training comprises 6 short courses, which can be done at any time and in any place. You will receive a separate enrolment email with a link to access the self-paced courses. When you receive that email, do the following:

Step 1   Click on the button to 'confirm email'. This will take you to a new page.

Step 2   Type in or change your name. This name will be used for your certificates of completion. This name will also appear with any comments you make in the course discussion forums.

Step 3   Set a password.

Step 4   Click the button 'go to courses'.

Step 5   Choose your first course and start learning.

Accessing the self-paced courses

You can access your self-paced courses anywhere and at any time: at work, at home, on a computer, tablet or phone. You can move between devices, and you can stop or re-start a course as many times as you like.

You have access to the courses for one year, and you can repeat the courses at any time in that period.

System requirements

The self-paced courses run best on Google Chrome, Mozilla Firefox, Microsoft Edge and Apple Safari. They won't run on Internet Explorer.

We have learners from business, the NSW and ACT governments, and federal departments who access our materials without any problems. If, however, your network blocks videos or other course content, try switching to another device. Phones and tablets don't have access issues.

You do not need to access the courses from a government computer or device. You can use a personal device, even if you have a government email address registered on your account.

Many lessons include a comments/discussion section. Please use it to ask questions and share insights. Your name will appear next to any questions or comments you post. We moderate all posts.

If you have any questions about the self-paced courses or have problems accessing them, please email us at admin@petersenink.com.au

Online tutorials

The self-paced courses support the virtual tutorials. There are 4 tutorials, each scheduled one week apart. The tutorials are 90 minutes long and are delivered using either Microsoft Teams or Zoom.

Virtual training works best when participants engage with the facilitator and each other. To help get the best out of each tutorial we ask you to consider the following:

- If you are comfortable doing so, please leave your webcam on during the tutorial. This helps the facilitator and other participants to engage with each other.

- Use a mobile phone or tablet instead of a computer. Some government networks don't work well with Zoom or Microsoft Teams. If you are concerned about this, try using a personal device, such as a phone, to bypass this problem.

Session 1: Expectations

Good writing supports governance, accountability and decision-making. You might never meet your portfolio's minister or most senior executives, but everything you write supports them, and your organisation will be judged by the quality of its writing. You can't write too well.

While some business and government writing is routine, many documents address complex topics that require research, analysis and a position. These documents might recommend actions and decisions to ministers and senior executives, or they might communicate those decisions to affected parties. These documents include briefs, minutes, business cases, reports, letters and emails.

Regardless of which type of document you are writing, they all benefit from a structured approach to their development. This course provides you with that structure.

Reader expectations

Activity: Writing for business and government

What do your readers expect of a business or government document?

Activity: What is a good document?

Read the document on the next page. Would this document satisfy the expectations of its reader?

BRIEF

To: Minister for ███████████████

Through: Secretary

              First Assistant Secretary, Operations

              Director, Operational Support

Subject: Single-source limited procurement for digital mapping software licenses

Critical date: 1st June 2017, in order to commence the contract on the 1st of July.

Recommendation

That you:

- Agree to establish an Enterprise Licensing Agreement (ELA) with Geologic Australasia over a 3 year period.

- Agree to establish the ELA using single-source procurement.

<table>
<tr><td>Comment:</td><td align="right">Agreed/not agreed/discuss</td></tr>
<tr><td></td><td align="right">....................... ..../..../....</td></tr>
</table>

Background

Property Management Division use digital mapping software for critical asset management decision making purposes.

Geologic Australasia has been the Property Management Division's and the Department of ███████████████ Digital Mapping software provider for 15 years. They offer industry best practise software solutions in the digital mapping spectrum.

The introduction of an Enterprise Licensing Agreement will allow all Divisions across the Department of ███████████████ to access digital mapping software to support their business objectives.

These objectives include:

- Asset management

- Data analysis

- Reporting

- Mobile data capture

Operational Support Branch within Property Management Division has investigated the available industry options with regard to digital mapping products. It has been determined that Geologic Australasia is able to provide the full suite of products required within a single contract arrangement to support Government objectives. The full compatibility of the software suite is critical to the success of Property Management Division's asset management processes.

Issues

The current contractual arrangements between Property Management Division and Geologic Australasia are inadequate with regard to providing sufficient numbers of licenses across Government. This will have the impact of hindering future technologies and information self-serving opportunities.

There are business efficiencies to be gained by enabling Property Management Division staff to be able to self-service asset management data using the Geologic Australasia digital mapping software. These include;

- Decreased burden on Operational Support Branch for basic procedures.
- Less down time by operational staff within business units waiting for information.
- Greater uptake of available technologies to support business objectives
- Synergies with other government agencies with regard to data sharing

Financial Implications

The cost of the ELA is $312 000 per year, over 3 years. Currently Property Management Division has a contract with Geologic Australasia that is $250 000 per year.

Property Management Division have sourced additional funding agreement from Property Acquisition Division and Property Sales Division for the duration of the ELA contract (3 years). Additional Property Management Division funding will be sourced from the existing Property Management Division Information Technology Service Level Agreement. The annual breakdown of injection funding per year for three years is as follows:

- Property Management Division—$22 000
- Property Acquisition Division—$10 000
- Property Sales Division—$30 000

Internal Consultation

Operational Support Branch have undertaken internal business analysis with respect to software requirements for Property Management Division.

Property Division have also consulted with Property Acquisition Division and Property Sales Division staff to ensure that their business requirements are supported by the Enterprise License Agreement.

Shared Services ICT have been consulted with regard to current Service Level Agreements in place with Geologic Australasia.

External Consultation

Property Management Division have comprehensively investigated industry suitability within the digital mapping software arena, and have also consulted with Geologic Australasia and other providers to determine enterprise viability of software products.

Benefits/Sensitivities

The benefits of this Enterprise Licensing Agreement are as follows:

- Access to a greater number of software products/licenses for Department staff.

- Ability to create innovative business solutions.

- Simple contract management.

- Centralised support and maintenance as part of agreement

- Availability of training for Government staff as part of agreement

There are no sensitivities with regard to this arrangement.

Media Implications

There are no media implications arising from this brief as this matter is an internal administrative issue.

Name redacted   Project/Action Officer: Name redacted

Section Manager – Digital Mapping

Phone: Number redacted

Writing process

Writing is a task. You wouldn't start a complex task without preparing for it, yet many people start writing before they have thought about what they should say. This is inefficient and often leads to a frustrating cycle of 'red-penning' and re-writing.

Applying a process to document production will make you more efficient. The document production process we use during this course is PLAN – THINK – WRITE – REVIEW.

Plan

Planning helps you understand your task. It involves identifying timeframes and the work that must be done to produce the document. Planning ensures your document will be released on time.

Think

Thinking is where you decide your purpose, key messages and call to action. You gather enough information to satisfy the who, what, where, when, why and how of the topic, and then analyse this information. Thinking requires you to consider your reader's needs and how to meet them.

Write

Once you've developed your purpose, key messages and call to action, you can draft the document. You adapt the document's style, structure and tone to suit your purpose and your reader's needs.

Review

Before releasing the document for signature, you should check it to make sure it is clear, concise and correct. This involves reviewing for substance (content) and style (readability).

Key points

Readers expect business and government writing to be:

- clear
- concise
- accurate and factual
- relevant to their needs
- action-oriented with clear directions or recommendations
- easy to read
- honest, polite and respectful
- timely and actionable.

Regardless of the document type, using the PLAN – THINK – WRITE – REVIEW process will help you meet these expectations.

Session 2: Substance and structure

This session is supported by the following self-paced courses:
Purpose and planning
Spotlight on structure

Managing writing like a project will improve your productivity. Good project management reduces confusion, manages stakeholder expectations, and aligns effort in support of a single purpose. This makes it a good way of managing document production as well.

A writing project starts with planning the substance and structure of the document.

Planning

Planning helps you to manage time when you are under deadline pressure. It recognises that writing doesn't occur in isolation from other work, and that more than one person might be involved in document production.

Every document, even an email, should be planned before you write. For simple documents, planning might take a few minutes. For more complex documents, such as reports, planning might take several days. In all cases, it is important to initiate the writing process with good guidance.

Initiation

Initiating a writing project is where you define a document's purpose, scope and deliverables. It explains the need for the document, and sets out your expectations of the writer. Initiation might be triggered by a business case, meeting or discussion, executive direction, or it might be a response to another document.

Some writing projects will have a strict separation between initiation and the later parts of planning. For example, a writer would not plan an investigation report until the terms of reference had been issued. In other documents, there might be overlap between initiation and later planning tasks.

The way you initiate a project will depend on how complex the document is:

- Simple documents can be initiated by using a framework such as the SMART goal setting criteria.

- Complex documents should be initiated with either terms of reference or an author's brief.

SMART criteria for simple documents

Initiating guidance does not need to be long, but it should be clear and thorough. One way of achieving this is to check it satisfies SMART goal setting criteria.

Specific	What type of document is required? Who will be the writer(s) and sponsor?
Measurable	What is the purpose of this document, and how will you know if it achieves that purpose? What will you be looking for when a draft is provided to you?
Achievable	Do the writers have the time and ability to develop this document?
Relevant	Your writing team are already busy, so this document will be written at the expense of something else. Is the document that important? What priority have you allocated to this work?
Time bound	When is the document required for publication, and what milestones need to be met along the way?

Notes

Terms of reference and authors briefs for complex documents

In a complex writing project, initiation is provided as either terms of reference or an authors brief. These initiation documents provide detail on scope, background, purpose, audience, resources and timeframes. They should also describe the review, approval and release process.

You should think about the following points when drafting terms of reference and authors briefs:

- Identify the document sponsor. What is the mandate for this document, and who will sign it?
- Confirm the purpose of the document. You should write this as a sentence.
- Confirm the level and scope of the document:
  - Who will the document be written for?
  - What is to be covered?
  - What is *not* to be covered?
  - What action is required of the reader?
- Explain the need for the document, including background relevant to the topic.
- Specify the type of document to be produced, and the style you want used.
- Direct how the document will be released. Consider whether this will affect format, navigation, size, colour, imagery, accessibility and content.
- Allocate responsibilities for document production, especially who will do the research, writing and reviewing.
- Identify stakeholders. Who should be consulted, and who should be asked to review drafts?
- Specify key production dates. When is the first draft due, when is the final draft due, and what are the dates for review?
- Specify any constraints on the document. For example, is it classified or subject to special handling requirements?
- Specify any non-standard writing conventions or styles. See attachment A for an example of how to do this.
- Allocate resources to produce the document. Describe the support available to your team, and tell them the priority of this work.
- Specify any known information sources, and if there is a preferred method of research and consultation.

Document sponsors don't always provide good initiating direction. If you are the writer, you may need to draft your own terms of reference, and ask the sponsor to approve them.

Style guides

The main style reference for business and government writing in Australia is the *Style manual*. This is an online guide published by the Australian Government. This manual provides guidance on general style conventions including formatting, language, numbers, punctuation and titles. It can be accessed at stylemanual.gov.au[1]

Many organisations also have their own style guides. Where they exist, they take precedence over the *Style manual.* For most documents, they will be the only style guidance you need.

Large writing projects might need a more detailed task style guide. A task style guide supports the authors brief by providing guidance to the writers and editors about your writing style preferences. Its purpose is to achieve consistent writing style, especially if you are working on a team task.

The content of a task style guide will depend on the project. It could range from a one-page summary of preferences (for example use 'executive level', not 'executive-level') to a detailed guide. It should summarise preferred spelling, grammar, punctuation, banned or preferred words, headings and other style conventions.

An example task style guide is in attachment A.

Key points

Planning document production doesn't need to take long, but it should never be overlooked. Tips for planning your document include:

- back-briefing your manager about your writing plan
- engaging stakeholders early in the research process
- writing down your information needs and sources
- allocating time and responsibility to each stage of document production
- confirming who will clear the document and the time they will need to do this.

[1] https://www.stylemanual.gov.au

Substance

It is inefficient to start writing before you have thought about what content will be relevant to the reader. There are 3 areas of content you must decide before you start writing:

- purpose
- key messages
- call to action.

Purpose

Good content starts with a well-defined purpose statement. Developing the purpose statement isn't always easy, but time spent getting it right will save time for both the reader and the writer.

Most readers are very selective about what they read. A good purpose statement helps them decide how to approach your document and how much priority to give it.

The document might be important to you (the writer or manager), but that doesn't mean it will be important to the reader. Think about the purpose from the reader's perspective, and what problem the document solves for them. Not every document is equally important, so don't embellish your purpose. An honest and accurate purpose statement allows the reader to decide whether to study, read, skim or even ignore your document.

Purpose statements keep writers focused

Writers can veer off topic when writing about complex issues. They can be distracted by other issues, or they might introduce material that is of interest to them, but not to their reader. When you have been working on a document for a long time, it is often hard to stay focused on what the reader needs.

A clear purpose statement anchors a document by reducing the chance a writer will stray off course.

Keep the purpose confined to the document, and don't describe the background of wider issues. The purpose of the document will determine your content and your call to action. For this reason, it is worth getting the purpose statement exactly right

Make sure your purpose statement is explicit. If the purpose is not clear in your mind, it will not be clear to the reader.

Aim for a one sentence purpose statement.
This forces you to be clear about what the document will achieve.

Key messages

If you have done a good job of defining your document's purpose, then your key messages will flow neatly. It will be easier to decide what to include and what to leave out of your document.

Your reader doesn't need to know everything you know about your topic. It can be tempting to include messages 'just in case', but if you try to tell your reader too much you will overload them. They might then miss your key messages.

Deciding your key messages requires you to make some tough decisions about what to leave out of your document.

Remove anything your reader doesn't need

Your document must always place the reader's needs ahead of your own. There are many factors shaping these needs, including:

- How much risk is attached to this issue, and does the reader 'own' the risk?
- How much technical content is required for the reader to do what you are asking of them?
- What is the reader's appetite for detail?
- How busy is the reader? How much time can they give this issue?
- What information needs to be 'on record'?

Remove anything the reader already knows

Sometimes your reader will already know something about your topic. For example, your document might be the latest instalment in an ongoing issue. Your document should make sense to its reader without the need for reference to other documents, but this does not mean it needs to contain every background detail.

Don't be tempted to display your own knowledge of the issue. You are not writing an essay where your knowledge is being assessed. This means your document must be based on evidence, but it doesn't need academic level citations.

Think about what your reader already knows about your topic, and leave this information out unless you want to give it special emphasis.

Remove anything your reader can work out for themselves

No-one likes being told something obvious or something they could have easily worked out for themselves. Your reader's brain goes into low power mode when you make such statements. Don't include clichés and empty phrases, as your reader is likely to skip ahead of this content until they reach something interesting.

You should make sensible assumptions about what your reader can and cannot work out for themselves. If you are not sure about this, talk to your manager or colleagues to get their opinions.

Call to action

The last stage in thinking about your document is to decide what you want the reader to do. This is closely connected to your purpose statement, but it isn't always the same thing.

The call to action is sometimes implied, but briefs and reports need an explicit call to action. These use strong verbs that leave your reader in no doubt about what you want them to do.

When writing your call to action, check that:

- it is consistent with your document's purpose
- it is supported by your key messages.

Strong verbs

Not all verbs are equal. Some are open to interpretation and leave your reader to guess what you want them to do. Verbs such as 'encourage' mean different things depending on the context of the document and the seniority of the writer. Calls to action should use strong verbs to remove this risk of misunderstanding.

Using strong verbs does not mean being rude. The verbs in documents such as briefs, contracts and policies don't need to be accompanied by polite phrases. However, in documents such as emails and letters, polite phrases such as please' and 'thank you' are expected.

Auxiliary verbs

Auxiliary verbs are words that support other verbs. They indicate possibility, capability and necessity. In business and government writing they are used to indicate expectation and obligation. In important documents, such as briefs, reports and contracts, auxiliary verbs have legal significance.

Auxiliary verbs	Meaning
must, are to and is to	These verbs give the reader **no choice** about what to do.
should	This verb tells the reader to do something unless there is a good reason not to. It **recommends** or **advises** the reader.
may	This verb gives the reader **permission** to do something or a **choice** about what to do.
shall, need to and have to	These verbs **do not** mean **must**. Their meaning varies with context.
would, will, could and can	The meaning of these verbs varies with context. Be careful using these verbs in important documents such as contracts and policies.

Briefs

Briefs must have recommendations. Your organisation's template will specify the location of the recommendations, which could be at the beginning or end of the document. In a brief, each recommendation must have its own 'sign-off' line. The following table lists the most common options for the sign-off in briefs.

Verb	Meaning
noted/please discuss	
agreed/not agreed/please discuss	
approved/not approved/please discuss	
signed/not signed/please discuss	

Structure

A well-structured document presents content in a logical pattern. The traditional approach to business and government writing is based on the smooth flow of content from start to finish. In these documents, the progression through the document is essential to the reader's understanding of the conclusion and call to action. Academic and technical papers almost always use this approach because the journey through the document is as important as the destination.

A logically flowing approach can, however, lead to a long document. The modern approach to business and government writing therefore places more importance on putting key content in positions of emphasis. This approach accepts that busy readers might not read the whole document before they act upon it.

The two approaches are sometimes in tension with each other, forcing you to focus on either flow or position.

Traditional layout	Modern layout
Background Purpose Issues and analysis Conclusions Call to action/recommendations	Call to action/recommendations Purpose Background Issues and analysis
Advantages: • logical flow • comprehensive • easy to follow.	**Advantages:** • shorter • direct.
Disadvantages: • lengthy • reader cannot go directly to the 'bottom line'.	**Disadvantages:** • disjointed flow • harder to write.

In some documents, such as ministerial briefs, your organisation's templates will specify which layout to use. In other cases, such as an email, you can choose how to structure the document.

Briefs and minutes

Templates will dictate the structure of your brief or minute. Comply with the layout of the template, and don't vary it, as these templates are designed for specific readers. These readers rely on a predictable layout to help them find the information they want.

Modern templates have the recommendations up front. Traditional templates tend to have the recommendations at the end of the document. Apart from this, and within the constraints of the template, you still need to think about the flow and position of your content.

Sentences and paragraphs

A sentence is a complete thought. This means it must make sense on its own. Sentences are best structured using 'active voice', which flows from the subject to the action to the object of the action. We will look at sentence structure in more detail in the last session of this program.
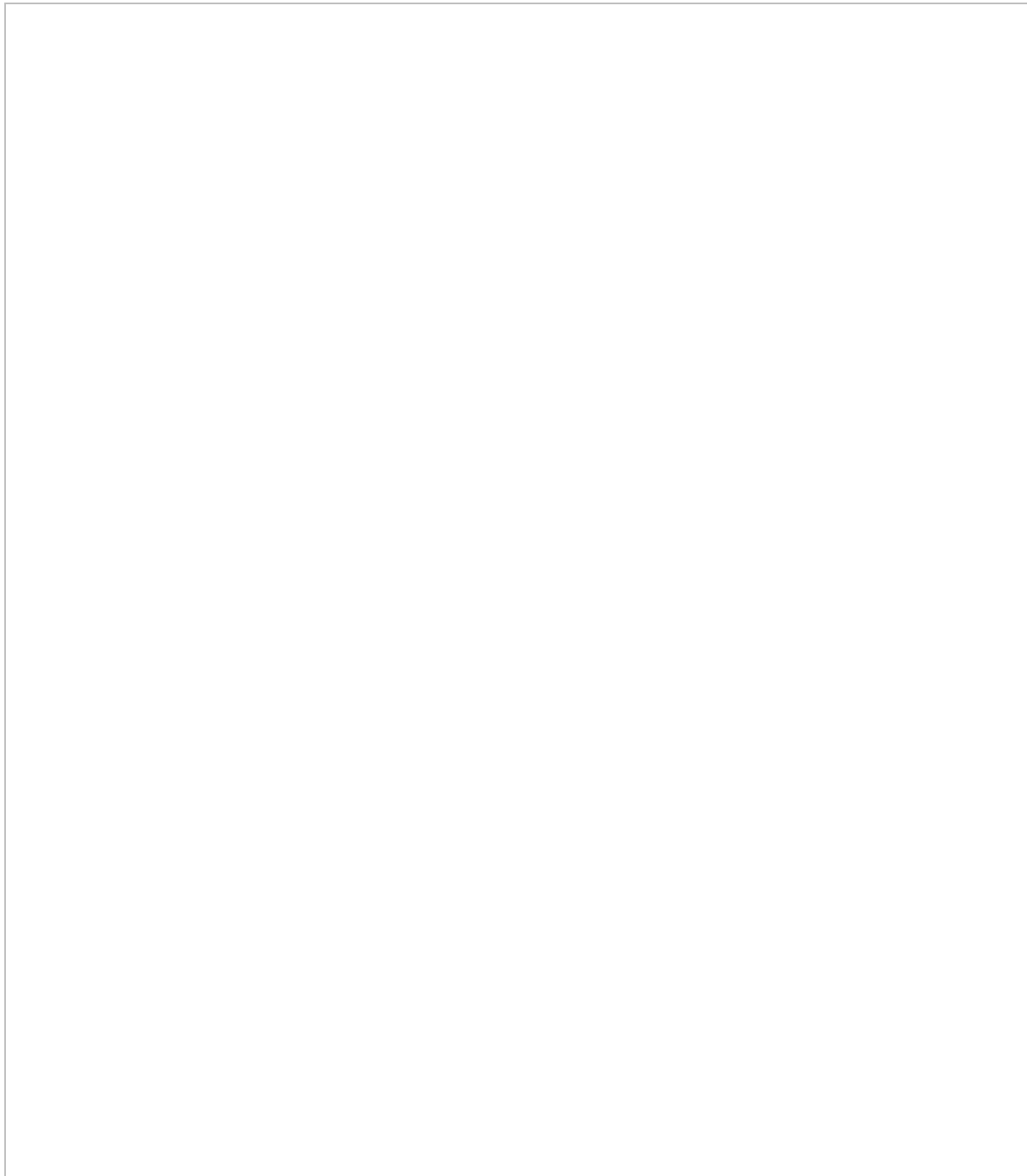
A paragraph is an idea or a complete point. If your point is complex, you might need several sentences to make it. In this case, one way to organise the sentences in your paragraph is:

- **Topic**. Use a topic sentence to state your point or what the paragraph will be about.
- **Evidence**. Provide the content which supports your point.
- **Explanation** or **example**. Elaborate on your evidence by providing an example.
- **Link**. Link back to your topic sentence, your conclusions or to your next paragraph.

Document peripherals

Many government documents contain peripheral information such as handling markers. This information not only helps the reader, it supports correct storage and distribution of the document. Attachment B explains some of these document peripherals, including protective markers, information management markers and attachments.

Notes

Key points

You must think about the content of your document before you start drafting it. This involves:

- defining the purpose of your document (write it as a sentence)
- deciding your key messages and ensuring they are all relevant to your reader
- directing your reader with a clear and assertive call to action
- structuring your document so it either flows logically **or** gets straight to the point.

Once you have done this, all that remains is to write these elements up in an easy to read style. This is the focus of the next session in this program.

Session 3: Plain English and readability

This session is supported by the following self-paced courses:

Words that work

Readers and readability

Documents must be based on good substance. This requires a well-defined purpose, relevant key messages and an assertive call to action. This substance must then be logically structured. It must also be written in a style that is easy to read. An easy to read writing style uses plain English, active voice and an assertive tone.

Plain English

All business and government documents should be written in plain English. This does not make them boring or unsophisticated – it makes them easy to read. The principles of plain English are:

- Use familiar, everyday words.

- Avoid unnecessary words.

- Vary sentence length, but keep to an average of 15 words.

- Prefer the active voice.

- Use personal pronouns such as 'we' and 'you', except in formal contexts.

- Use direct verbs instead of nominalisations (use 'explain' rather than 'provide an explanation'; 'apply' rather than 'make an application').

- Break up dense strings of nouns and modifiers (such as 'the outline development plan land package release conditions').

- Avoid euphemisms, clichés and overused or trendy words or phrases.

- Prefer simple sentences.

Use simple words

There are more than 600,000 words in the English language, but you don't have to use all of them. If you use a complex or unusual word, you might confuse your reader or even put them off. Complex language can make you sound arrogant and distant, whereas simple language is engaging and memorable.

Unfortunately, many documents at work are infested with overly complex language. This is habit. We are used to seeing longer words at work, and many people think this is expected in work writing. It isn't. Every organisation wants its people to use simple and familiar words in their documents.

Activity: Plain English

What are the plain English versions of these words and phrases?	
utilise	
initiate	
principal	
take into consideration	
conduct an investigation	
undertake an analysis	
carefully analyse	
rectangular in shape	
provide suitable options	
We will conduct an experiment on the students.	
Paul carefully removed the fuse from the bomb.	

Complex language isn't just distant, it's also confusing. Many English words have more than one meaning, such as 'sanction' and 'oversight'. Others sound similar but have different meanings. Examples of these words include:

- alternate and alternative

- effect and affect

- principle and principal

- advice and advise

- assure, ensure and insure

- discrete and discreet.

In most of these examples, there are simpler options that can be used. For example:

*The project team established a **discrete** budget for the Melbourne office.*

or

*The project team established a **separate** budget for the Melbourne office.*

In other cases, you might need to use more words to make your point clearly. For example:

*You should **ensure** the delegate is aware of their responsibilities.*

or

*You should **make sure** the delegate is aware of their responsibilities.*

In all these situations, don't use a word if you are not sure of its meaning. Your reader should not have to use a dictionary to understand your document.

Technical language

Technical language and jargon is appropriate for readers who are familiar with the topic. But readers who are not familiar with this language deserve plain English. This might mean using more words to get your point across. For example:

Technical language and jargon	Plain English
trivalent vaccine	three-strain vaccine
probity	transparency and accountability
hardstand	level and stable area that can support heavy vehicles

Abbreviations

Abbreviations are hard to read unless the reader is familiar with the abbreviation. This is true, even when abbreviations can be pronounced as a word.

If you use an abbreviation, you should explain it to your reader. The first time you use the abbreviation, spell it out in full and place the abbreviation in brackets after. For example:

> *We will send the draft environmental impact statement (EIS) to members of the working group next week. Once the working group has cleared the EIS, we will brief it to the Executive Director.*

A better option is to use a plain English word or phrase instead of the abbreviation. For example:

> *We will send the draft environmental impact statement to members of the working group next week. Once the working group has cleared the statement, we will brief it to the Executive Director.*

Don't use an abbreviation unless you are sure it will be easy for your reader.
If in doubt—spell it out.

Readability

Your reader should be able to understand your document after one reading. It doesn't matter how carefully you have planned and thought about your messages; your work will be wasted if your document is hard to understand. Documents that are hard to read are annoying and frustrating. This is not a good plan if you are trying to persuade your reader to do something.

Readability is the word that describes how easy a document is to read. Long sentences and long words are the main cause of readability problems. Readability can be measured using calculations based on the average number of words per sentence and the average number of syllables per word in your text.

This calculation is automated in the readability checker in Microsoft Word. The readability checker is part of the spelling and grammar checker, but must first be enabled using the following menu path:

File – Options – Proofing – Select 'show readability statistics'

Microsoft Word will then provide readability statistics at the end of every spelling and grammar check. There are two readability scores in Microsoft Word:

- **Flesch reading ease.** This rates text on a 100-point scale. The higher the score, the easier it is to understand the document.

- **Flesch-Kincaid grade level.** This rates text on a school grade level. For example, an eighth grader can understand a document that has a score of 8.0.

The Australian Government style manual recommends a Flesch-Kincaid grade level of 7 at work. This is a tough benchmark, and we recommend the following more achievable guidance:

Websites and information addressed to the general public	Flesch-Kincaid grade level 7
Other documents for the public	Flesch-Kincaid grade level 8–10
Internal work documents	Flesch-Kincaid grade level 10–12
Documents for busy decision-makers	Flesch-Kincaid grade level 8–10

Activity: Readability levels

Estimate the readability level of the following sentence. How could you improve its readability?

In the normal course of business, the department makes many procurement decisions, and in this circumstance, to ensure we fully complied with the Commonwealth Finance Framework, the decision was made to utilise the Department of Industry procurement panel.

38 words
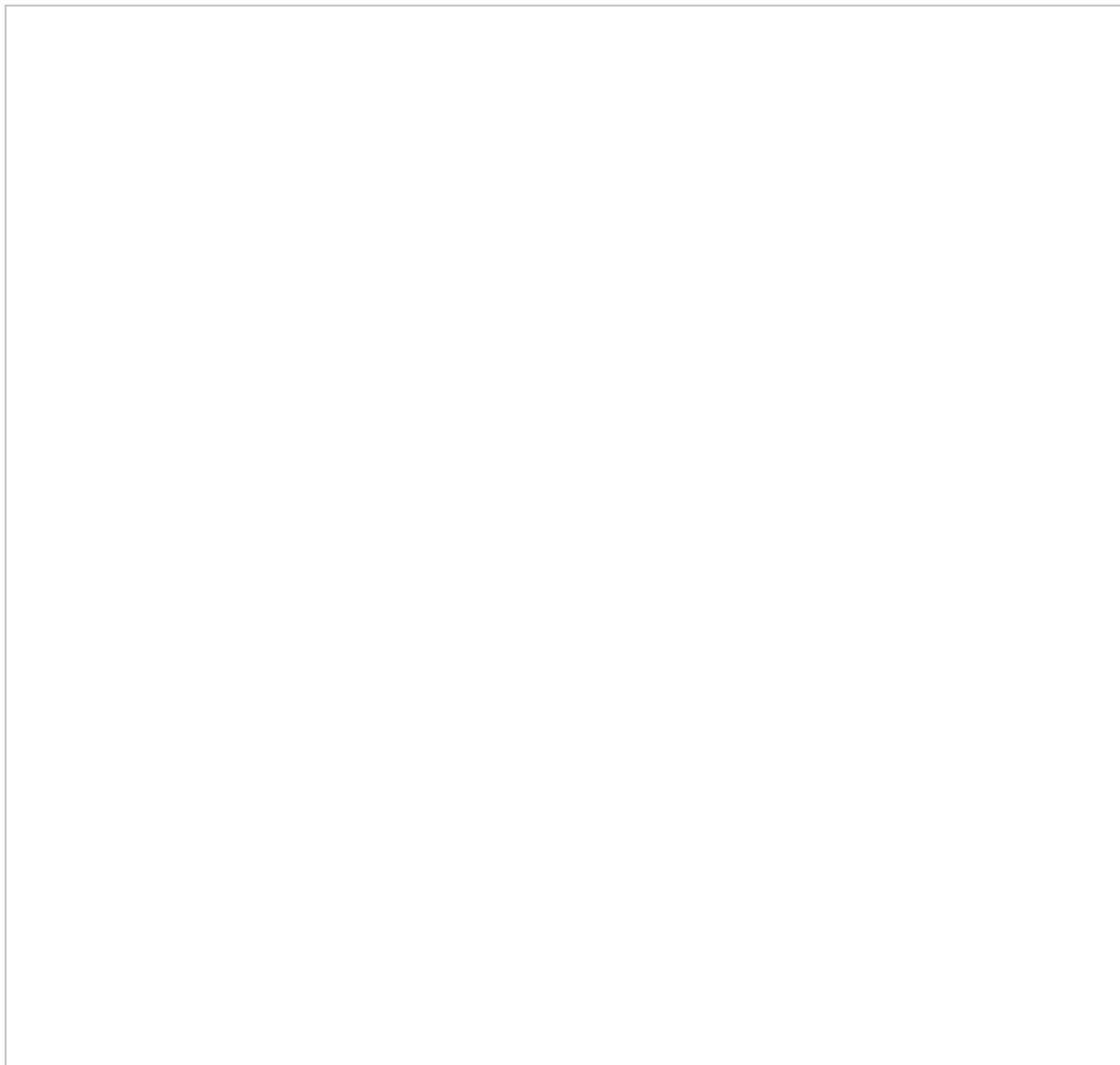
Flesch Kincaid grade level: 21.2

Improving readability

If you want to improve the readability of a document, you must use shorter and fewer words in your sentences. This can be done in three stages:

- remove unnecessary words, such as adverbs and fake verbs
- replace long words with shorter words, for example replace utilise with use
- reduce the length of your sentences by focussing on one thought for each sentence.

Don't be tempted to use more abbreviations in your text. While these might yield a better Flesch-Kincaid grade level, abbreviations are quite hard to read. Your document might be easier to read if these terms are written out in full.

Notes

Session 4: Active voice and review

This session is supported by the following self-paced courses:
Sensible sentences
Effective editing

This last session in our program explains why active voice writing is more accountable and assertive. It also shows how to review documents in an efficient and productive way.

Active voice

Active and passive voice are aspects of grammar that describe how the words in a sentence are arranged.

Every Australian government style guide recommends the use of active voice in preference to passive voice. This is because active voice is more direct than passive voice. It uses fewer words to communicate the same information, and it flows in a predictable direction.

When you communicate at home, you almost certainly use active voice. Business and government writing is, however, infested with passive voice. While this is appropriate in some situations, passive voice is mostly used in a misguided attempt to sound official. Like many of the other topics we have looked at in this course, over-use of passive voice is habitual and hard to spot.

Active voice is a direct way of constructing sentences that places the agent (the doer) ahead of the action. This makes the agent the subject of the sentence. The order of words in an active voice sentence is:

subject – verb – object

Active voice supports accountability because it emphasises the person (or thing) responsible for an action. An example of an active voice sentence is:

The whole team attended the working group.

Passive voice places the agent after the verb in a sentence. This is sometimes appropriate, but it de-emphasises responsibility. An example of a passive voice sentence is:

The working group was attended by the whole team.

Passive voice should be avoided unless:

- the agent is not important
- you don't know who the agent is
- you want to soften the tone of your message.

Agentless passive sentences

Agentless passive sentences don't have an agent. Sometimes this can't be avoided. For example, the following sentence has an implied agent:

Thank you for your email.

In this next sentence we don't know who the agent is:

Several computers were taken last night.

Government and business writing places special importance on accountability. For this reason, be careful with agentless passive sentences as they can hide who was responsible for an issue or action.

Activity: Active voice

Are the following sentences active, passive or agentless passive?

The project report was signed by the director.
In the normal course of business, the department makes many procurement decisions, and in this circumstance, to ensure we fully complied with the Commonwealth Finance Framework, the decision was made to utilise the Department of Industry procurement panel.

Focus on readability before grammar.
Documents that are easy to read have fewer grammar problems.

Review

Reviewing your document is the final stage of the writing process. It comprises editing and releasing your document, and can be done by the writer or by another person. In either case, good writers do not start this stage until they have finished writing. If you start reviewing too early, you might be wasting time reviewing work which does not end up in the final draft.

If you approach your review methodically, you will avoid a frustrating backwards and forwards revision cycle with clearance and release authorities. When you start your review, separate your checks into two stages:

- substance reviewing
- style reviewing.

Activity: Checklists for reviewing

What things should you check when you are reviewing a document?

Substance review	Style review

Reviewing for substance

Before you start checking grammar and typos, make sure you've got the content right. Check the purpose is defined, the key messages are relevant, and the required action is clear.

Substance reviews tend to be harder to do than style reviews. This is because they require a reviewer who understands enough about the topic to check if the document will achieve its purpose.

Attachment E is a checklist for a substance review.

Reviewing for style

Once you've got the content right, it is time to check the document's style. Make sure your grammar, spelling, punctuation and style conventions are appropriate. The main test for this is that your document can be understood after one reading.

Techniques for a style review depend on personal preference. Some people can review on screen, but others prefer to print the document for review. Some people start at the end of the document and work forward, but others are happy to start at the beginning.

Spelling and similar errors are unprofessional and may distract the reader from your content. They must be fixed, and it is easy to do so. But don't over-edit during the style review. You may think 'happy' is a better word than 'glad', or that the grammar needs fixing, but will these changes make the message clearer? If not, leave them alone.

Attachment F is a checklist for a style review.

Accessibility

One in five Australians has a disability that affects their ability to read, and your documents must be accessible to them. The standards to ensure your document are accessible are called Web Content Accessibility Guidelines.

Attachment G outlines your obligations in this area, and describes how to check that your document is accessible.

General hints for reviewing a document

You should manage the review process like any other task. Here are some hints to help you do this.

Fresh eyes

Ask someone else to review the document. Fresh eyes are always best when reviewing a document as they will pick up errors and gaps in logic that you have subconsciously filled in.

Substance followed by style

Be specific about which type of review is being done. Substance reviews are very different to style reviews, and it is hard to do them at the same time. Your subject matter experts and managers should normally be doing a substance review, not a style review.

Face-to-face feedback is best

Don't use track changes for a substance review. Track changes is good for a style review, but the comments function in Microsoft Word is better for a substance review. You can also use a separate comments sheet for a substance review. Better still, ask for feedback on the document's substance face-to-face.

Don't be passive about feedback

Don't be passive about feedback, especially if you ask someone to review a document for substance, but they comment only on style issues. Check they are happy with the substance before you make their suggested style changes.

Use the freezer

Put your document in the freezer. If you are reviewing your own document, set it aside for as long as possible before you review it. Overnight is good, but a few days is better. If you are under pressure, a few minutes in the freezer is better than no time at all.

Edit for clarity not vanity

Don't over-edit the document, especially if it was written by someone else. If you suggest too many minor changes, the author may stop trying with their documents because you are likely to change them anyway.

Attachments

Attachment A: Example task style guide

Sponsor:	First Assistant Secretary
Style manual/guide:	Australian Defence Force Writing Manual
Dictionary:	Macquarie and Australian Defence Glossary
Spelling:	Australian
Template:	Bridge – separate file for each chapter
Classification:	For Official Use Only

Other requirements

- check for WCAG 2.0 accessibility

- aim for level 9 readability

- publish document as a single PDF file on the department intranet

- document is to be readable electronically and in print

- some readers may not be able to access hyperlinks.

Style and usage

ABC	DEF	GHI	JKL
anaesthesia (not anaesthetics) con artist (not conmen, con men or con-men)	Defence member (not ADF member)	health services (not health professions)	legal officer (not lawyer)
MNO	**PQR**	**STU**	**VWX**
nursing officer (not nurse)	paramedic (not ambulance officer)	clinical director (not SMO or SHO)	workplace health and safety (not work health and safety)
YZ	**Numbers** Sticky space as separator (not comma)	**Date/Time** 03 January 2015 24-hour time	**Typeface** Times New Roman 12
Referencing Footnote and reference list	**Shortened forms** No full stops in any short form	**Punctuation** Minimal capitals in headings Titles of military publications in maximal capitals	**Other** Blue underline for hyperlink text. Also provide hyperlink in angle brackets

Attachment B: Document peripherals

Executives and ministers read a lot of documents, and the templates in your organisation have been designed to suit their needs. They know where to look for the information they seek, and changing the template makes it harder for them to do this.

This attachment provides guidance on how to populate a generic brief or minute template. The same guidance applies to emails and letters, but these documents have simpler structures.

Handling markers

Government documents often contain content that needs special handling. These handling restrictions are specified by two types of marker: protective markers and information management markers.

Protective markers

Protective markers describe the sensitivity or security classification of information. The protective markers used in Australia are:

- UNOFFICIAL
- OFFICIAL
- OFFICIAL: Sensitive
- PROTECTED
- SECRET
- TOP SECRET

These markers may be accompanied by caveats, which describe additional handling restrictions. Caveats are often used to protect intelligence sources and to restrict release of documents to foreign governments.

Information management markers

Information management markers (IMMs) are similar to protective markers but describe sensitivity instead of security. They are used to identify documents containing:

- information covered by legal professional privilege
- information covered by legislative secrecy provisions
- personal information as defined in the *Privacy Act 1988*.

IMMs are optional. If you decide to use an IMM, your document should also be **OFFICIAL: Sensitive** or higher.

The person who prepares the document is responsible for deciding the handling marker. The Australian Government's <u>Protective Security Policy Framework</u>[2] guides agencies on how to do this.

If your template does not have an embedded style for the handling marker, then insert the marker at the top and bottom of each page in a centred red bold font. A protective marker uses all capitals (for example **SECRET**); an information management marker uses sentence case (for example **Legal privilege**).

References and attachments

References and attachments are optional reading. They are used to provide supporting content for the reader and should never be used as the only way to communicate a key message.

Each document should have a file reference. This should be embedded in the template. Some agencies have file references in cover sheets, but best practice is to have the same reference on the document itself.

Recipients

The template you use will guide your approach to recording recipients. Some agencies have a clearance process (for example 'through'), and this is recorded on the template. If you need to distribute copies of the signed brief, you should list the cc addressees on the document.

Critical date

Some templates include a critical date. The critical date is the date by which the reader must act or decide. You should include the reason for a critical date.

Headings

Comply with your template's requirements for headings. For other documents, do not over-capitalise, as this makes the heading harder to read. Headings should get the reader's attention, be kept to one line and provide an indication of the following content. Think about the words someone would use in a search engine if they were looking for your content, and use these words to help phrase your heading.

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[2] https://www.protectivesecurity.gov.au/information/Pages/default.aspx

Background

The background section provides the background to the document – not the background to the problem. While these might overlap, you should not include background information that doesn't support your document's purpose.

The background section of a document states how the need for the document arose, and may include previous decisions and actions leading to the current situation.

Your reader is unlikely to have as much knowledge about the topic as you. Nonetheless, you must balance the need for background information with the need for brevity. Use attachments or references to provide additional background information, but wherever possible, draft your document so it stands alone as a consideration of the topic.

Flags

Flags draw the reader's attention to specific parts of your document. They are useful if you have places that require signature or if you need to cite evidence from attachments.

If you submit a document electronically, you would use internal hyperlinks and comments to flag content for the reader. If you are submitting a printed copy, you would use stick on flagging.

Head flags indicate each separate document that is attached to the main document. A side flag draws the reader's attention to a specific paragraph, field or sentence in an attachment.

You should list the flags at the end of the main document, under the signature block. For example:

Attachments:	
A.	Talking points [head flag A]
B.	Draft letter to employees [head flag C]
C.	Clinical advice on flu vaccinations [head flag C]
Side flags:	
C1	para 4
C2	para 27

Attachment C: Improving readability

There are three steps to improving the readability of a document:

- remove unnecessary words
- replace long words with simpler words
- keep sentences focused on one thought

Original text

In the normal course of business, the department makes many procurement decisions, and in this circumstance, to ensure we fully complied with the Commonwealth Finance Framework, the decision was made to utilise the Department of Industry procurement panel.

38 words
Flesch Kincaid grade level: 21.2

Remove unnecessary words

~~In the normal course of business~~, the department makes many procurement decisions, and ~~in this circumstance~~, to ensure we ~~fully~~ complied with the Commonwealth Finance Framework, the decision was made to utilise the Department of Industry procurement panel.

28 words
Flesch Kincaid grade level: 17.6

Replace long words with simpler words

The department makes many procurement decisions, and to ensure we complied with ~~the Commonwealth Finance Framework~~ *government finance rules*, ~~the decision was made~~ *we decided* to ~~utilise~~ *use* the Department of Industry procurement panel.

25 words
Flesch Kincaid grade level: 15

One thought = one sentence

The department makes many procurement decisions. To ensure we complied with government finance rules, we decided to use the Department of Industry procurement panel.

24 words
Flesch Kincaid grade level: 10.9

Attachment D: Active and passive voice

Active and passive voice is an aspect of grammar that describes how the words in a sentence are arranged. Sentences in the English language are designed to flow in the following order:

Subject – verb – object

The subject is the main *thing* in the sentence. The verb is the action, and the object is whatever is being acted upon. Unfortunately, this sequence isn't always obvious because:

- the subject and/or the object are implied instead of written

- there is more than one subject, verb or object in the sentence.

Despite these complications, sentences can be structured in three ways:

- active voice

- passive voice

- agentless passive voice.

Active voice

Active voice places the agent (the doer) as the subject of the sentence. This sentence structure reflects the way we describe most things in life.

Subject	Verb	Object
Flight 839	is departing	later than scheduled.
Alex	ate	porridge.
This email	explains	the new process.

Passive voice occurs when this order is changed:

Departing later than scheduled is Flight 839.
Porridge was eaten by Alex.
Explained in this email is the new process.

Every Australian government style guide states you should use active voice in preference to passive voice. This is because active voice is more direct than passive voice. It uses fewer words to communicate the same information, and it flows in a logical direction.

Passive voice

Passive voice isn't always bad. For example, it is appropriate when the doer in the sentence is not important:

'The project team was praised by the Secretary for their good work.'

Passive voice can also be used to soften an awkward or harsh message. For example:

'Your certificate was sent to the wrong address by an inexperienced staff member.'

A succession of short active voice sentences can be boring and repetitive. They can be relieved by an occasional passively voiced sentence. For example:

'Alex has been project manager for 6 months. They are ahead of schedule and under budget. Alex has achieved this despite being short-staffed. The project is being well managed by Alex.'

Agentless sentences

It is a short step from passive voice sentences to agentless passive sentences.

Active	The Department of Prime Minister and Cabinet has proposed a separate business model.
Passive	A separate business model has been proposed by the Department of Prime Minister and Cabinet.
Agentless passive	A separate business model has been proposed.

In some cases, the doer in your sentence will be implied, normally because you mentioned them in the preceding sentence. Even so, agentless passive sentences compromise accountability, especially over time, as you lose corporate knowledge about the document.

A sentence is a complete thought, which means it should be clear about who did what.

Attachment E. Substance review checklist

Item	Factors to consider
Purpose	• What is the purpose of the document? • Does the document achieve its purpose? • Does the document have a clear purpose statement?
Content	• Is every sentence relevant to the document's purpose? • Are all elements of the document complete: preliminary matter, contents, end matter and headers/footers? • Does the document contain obvious information which could be safely deleted? • Is the document's content based on evidence?
Action	• Are action statements clear and assertive? • Are action statements predictable based on document content? • Do action statements include a doer?
Structure	• Is the flow of information logical? • Is any important content buried where it might be missed? • Does the document use the correct template/layout? • What is the size of the file (for e-distribution)? • What is the document's method of distribution: print or electronic? • Can the document's headings be used as bookmarks?
Legal	• Are there risks associated with the document? • Are there doubtful or questionable statements in the document? • Has the document respected copyright? • Should the document list the references or authorities consulted? • Has the document respected privacy? • Is there defamatory content in the document? • Should the document have a handling marker? • Who is authorised to release the document?

Attachment F. Style review checklist

Item	Things to check
Plain English	• Check for unfamiliar words, jargon, too many words, repetition and long noun constructions. • Check for excessive passive voice, subject–verb agreement and tense. • Check sentence construction, run-ons, defining/non-defining clauses and placement of modifiers. • Check readability level (word length and sentence length).
Spelling	• Check for Australian spelling. • Check spelling in headings (especially when in all-capitals).
Punctuation	• Check commas, semi-colons, dashes, apostrophes and quote marks. • Check dot points have parallel structure and correct punctuation. • Check numbers, dates and names for sticky spaces. • Check spacing between sentences and vertical spacing between paragraphs.
Style	• Check capitals, italics, bold, underlining and coloured text. • Check numbers, dates, shortened forms and hyperlinks. • Check tone (assertive, aggressive, passive-aggressive, passive).
Accessibility	• See separate attachment.
Appearance	• Check layout is in accordance with organisation's preference. • Check heading levels, header and footer and page numbers. • Check cover pages, table of contents, widows and orphans and white space. • Check paragraph styles are numbered/unnumbered and aligned.

Attachment G: Accessibility

One in five Australians has a disability that affects their ability to read, and your documents must be accessible to them. Fortunately, modern assistive technology makes this possible. The standards to ensure your document are accessible are called Web Content Accessibility Guidelines (WCAG).

Most organisations have internal guides for preparing accessible PowerPoint slides, and Word and PDF documents. The style review checklist in Attachment E includes these basic accessibility checks.

If you are using Microsoft Office 2010 and higher, you can also run the accessibility checker to check your document.

- If the accessibility checker flags something as an 'error', then a person with impaired vision will not be able to read the content.
- If the accessibility checker flags something as a 'warning', the content is difficult for a person with impaired vision to read.

You can find the accessibility checker in Microsoft Office in the review tab of the ribbon.

These are minimum requirements for accessibility. Even if you achieve technical conformance you may still be in breach of the *Disability Discrimination Act 1992* if someone cannot access your services and is being discriminated against in practical terms.

If you would like to learn more about accessibility, please contact the Australian Government Digital Transformation Agency at www.dta.gov.au

Vision Australia also run courses on creating accessible documents www.visionaustralia.org

The following checklist covers the most common WCAG issues, but it is not a substitute for checking the full WCAG guidelines.

Item	Factors to consider
Accessibility	• Ensure format uses MS heading styles. • Check text boxes and columns. • Remove Smart Art and hidden text. • Check images have alt text with short descriptions and explanatory text. • Check there are no floating images (images should be in line with text). • Check tables have a simple and screen readable format. • Check text is high contrast, and colour is not used to convey meaning. • Check hyperlinks are descriptive rather than a URL or 'click here'. • Check hyperlinks open in a new screen and link to a stable site.

www.petersenink.com.au