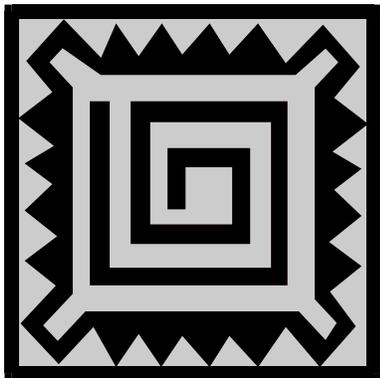


Developing, Translating and Reviewing Spanish Materials



Recommended Standards for State and Local Agencies



State of North Carolina
Department of Health and Human Services
Division of Public Health

Developing, Translating and Reviewing Spanish Materials

Recommended Standards for State and Local Agencies

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State of North Carolina

Department of Health and Human Services
Division of Public Health
Migrant and Refugee Health Programs



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This document was developed to provide public service agencies with guidance on developing, translating and reviewing Spanish materials before adopting them for use with clients. Not-for-profit use of these guidelines is encouraged. Feel free to reproduce or tailor the contents to your educational needs, but we ask that you credit the source.

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OVERVIEW

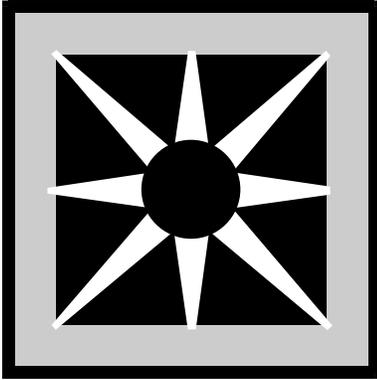
Public service agencies frequently experience difficulty in identifying appropriate Spanish-language materials for clients. These agencies also encounter problems when they translate or develop materials in-house. This document has been developed in response to the needs expressed by many state and local agencies for guidance and resources to help them ensure that appropriate Spanish-language materials are available to their clients.

These guidelines are organized to include:

- An **introduction** about the increasing need for Spanish-language materials and the importance of providing appropriate bilingual materials to clients.
- **Model standards** to assure that the bilingual materials agencies provide to Spanish-speaking clients are of comparable quality to the English materials distributed by the agency.
- A description of the **characteristics** of quality bilingual materials.
- **Guidelines** on developing, translating and reviewing bilingual materials for Spanish-speaking clients. Agencies also are provided guidance on the relative benefits and disadvantages of developing materials, translating existing materials, and using existing bilingual materials. Each section includes a step-by-step guide for developing, translating or reviewing Spanish-language materials.
- **Appendices** which include information on bilingual materials resources.

Have you ever needed medical attention while visiting a foreign country?

Consider for a moment what it would be like if . . .



You are visiting Mexico and you are able to use your high school Spanish and gestures to order meals and ask directions without too much difficulty. Then, after several days of sight-seeing, you develop a terrible, itching rash on your arms. Your hotel directs you to a local clinic. No one at the clinic speaks English. Someone at the clinic, you are not sure if it is a doctor or a nurse, asks you questions, but he speaks quickly and you understand only a few words of what he is saying. You point to your arm, but can't remember the words in Spanish for itch or how to say when the rash started.

The clinic gives you a bottle of liquid medicine. Grateful to have something, you try to understand what you are being told about the medicine. You understand that you take it twice a day. Back at the hotel, you realize that you don't know if you are supposed to take the liquid by mouth or rub it on the rash.

-
- ★ Fortunately, when we need medical attention, most of us are able to communicate with our health care provider. Having such a frightening experience as just described might help us to better understand what thousands of immigrants experience in this country when they seek medical care. Often there is no trained interpreter to translate essential information between health care providers and patients. Written instructions and information may be provided only in English or translated into Spanish at an inappropriate reading level.
 - ★ Lack of communication can have serious consequences for health care providers as well as patients. Making an accurate diagnosis and providing patient instructions and health education require good communication between the provider and patient. No health care provider wants to be in the position of depending on limited English, gestures and supposition to make critical decisions about the care of their patients. Neither do they want to take the chance of giving out inaccurate written information.

INTRODUCTION

Why Provide Materials in Spanish?

During the last decade, North Carolina experienced a 35% increase in its Hispanic population. The projected increase in the Hispanic population in the 1990s is 27%. A significant portion of this fast-growing population does not speak English or has limited English proficiency. As North Carolina public service agencies serve increasing numbers of Spanish-speaking clients, they recognize a critical need for Spanish-language materials so they can provide these clients with the same level of services available to other clients.

What Are the Benefits of Using Bilingual Materials?

The benefits of providing clients **appropriate** bilingual materials are considerable. They include:

- ✦ Improving clients' comprehension of education materials and instructions;
- ✦ Improving clients' ability to follow prescribed treatment and medication schedules;
- ✦ Avoiding preventable health crises and the inappropriate use of health care services (for example, the diabetic patient able to understand written instructions related to insulin dosage is less likely to need emergency room services);
- ✦ Reducing the waste of printed materials. All clients generally discard materials that are written in a language they cannot read or that are written at a reading level they cannot understand;
- ✦ Avoiding possible legal liability due to miscommunications; and
- ✦ Reducing administrative time needed to correct miscommunicated information.

Serious consequences can occur when clients are given materials they cannot understand or when clients receive poorly translated materials that provide inaccurate information.

MYTH It is always better to have something written in Spanish to give to Spanish-speaking clients.

FACT Giving clients poor quality materials in their own language may actually do more harm than good. Materials that contain inaccurate information, are poorly translated, or are written at an inappropriate reading level do not benefit clients.

What Are Quality Bilingual Materials?

Just as with materials written in English, multiple factors affect the quality and effectiveness of Spanish-language materials. Specific issues that relate to the translation of information in another language can be critical. For example, many agencies translate materials for clients but are not aware that usage and idiomatic expressions can vary considerably among and within Spanish-speaking countries.

We have only to consider the differences between British and American usage to understand the importance of this issue. It has been estimated that there are 4,000 common usage words in the United States that are different in British English. Imagine the confusion that could arise, if someone from England were writing information for Americans on home safety and used the term “loo” for bathroom and “torch” for flashlight.

Similar important language differences exist between Mexico and Puerto Rico as well as among the many other Spanish-speaking regions. For example, in Mexico and other countries the word “pena” means to be embarrassed. In Ecuador and Peru, pena means to be sad. The professional translator is aware of subtle language differences and knows when it is appropriate to use the common idioms of the country of the target audience. Peer review and field testing of a draft of the translated materials also provide valuable assistance in assuring that the appropriate vocabulary is used. Such testing is an essential component of producing quality bilingual materials.

Developing, translating and evaluating the quality of foreign-language materials requires consideration of several factors.

Quality Spanish Materials Should:

- ★ *Reflect current state/local recommendations and provide up-to-date information;*
- ★ *Accurately translate information into grammatically correct Spanish while reflecting the idiomatic characteristics of the target population;*
- ★ *Present the information in a readable and culturally appropriate manner; and*
- ★ *Be written at an appropriate reading level for target audiences.*

There are potentially serious consequences for agencies distributing materials that do not meet these criteria. These consequences can range from embarrassment for the agency to a potential lawsuit resulting from inaccurate information being provided to clients.

Public service agencies face potentially serious consequences when they distribute materials that do not meet these criteria. Agencies do not want to later learn that they have given clients mistranslated information that is incorrect. Neither do they want to discover that they have given clients materials that are offensive or insulting.

Introduction

Consequences for the agency can range from embarrassment to serious liability for providing incorrect information. The consequences for clients receiving incorrect information can be even more serious. This is particularly true when health issues are concerned. Each agency must establish quality standards for bilingual materials given to their clients.

How Can Spanish Materials Be Presented?

Agencies need to consider how they will produce the Spanish and English versions of printed materials. Will the Spanish and English versions be produced in one document or will they be separate documents? Your decision as to which option to choose depends on the length of the document and how much room the information and illustrations require; for example, is there enough room to add the Spanish translation on the same page? Field testing with clients and staff suggests that having both versions included in a single document is preferred. However, the appearance of the document is important, and adding the Spanish translation should not make the information appear cluttered and confusing to clients. Work with your concept of how the final document will look and can be used best by clients and staff.

Possible options for producing materials include:

- ★ Providing separate English and Spanish versions;
- ★ Producing a single document with Spanish and English text in different parts. For a one-page document, the Spanish could be on the back of the English version. For longer documents, the Spanish and English versions are in the same document but in separate sections.
- ★ Printing the Spanish under each line of English text (this can be more useful for forms); or
- ★ Placing the Spanish version as a block adjacent to the English version.

Agencies must remember that it is essential that all Spanish-language materials have an English version as well. Agency staff must always be aware of the exact content of any materials provided to clients.

GENERAL RECOMMENDED STANDARDS FOR BILINGUAL MATERIALS

For easy reference, here are all the standards being recommended throughout these guidelines.

- ★ **Define an agency policy regarding bilingual materials.** It is essential that agencies formulate policy and procedures related to the use of foreign-language materials. Policy should address the need to use a trained bilingual material specialist or translator and the need to establish a review process for evaluating materials before they are adopted.

Agency standards and criteria for review should require materials to:

- ▶ Be accurate in content;
- ▶ Provide clear messages;
- ▶ Comply with agency policy;
- ▶ Be written in grammatically correct Spanish;
- ▶ Have a format suitable for the target audience;
- ▶ Contain current and complete information or recommendations; and
- ▶ Be easy-to-read, written at a reading level appropriate for the target audience.

- ★ **Consider developing materials in Spanish rather than translating an English version.** Materials developed for English-speaking populations may not be culturally appropriate for Spanish-speaking clients.

- ★ **Check with the appropriate state agency before deciding to develop or translate materials.** The agency may be interested in collaborating on the project if there is wide interest and need for the materials.

- ★ **Always use a trained bilingual material specialist to develop or translate materials.**

- ★ **Do not depend on computerized translation programs to translate information. They are not accurate.**

- ★ **Never distribute Spanish-language materials to clients unless your staff has an English version.**

- ★ **When possible, include the English and Spanish versions in one document.**

- ★ **Review Spanish-language materials from outside sources for accuracy of content and accurate translation before providing them to your clients.**

- ★ **Send Spanish-language materials that you have developed or translated out for review to bilingual professionals representing a broad spectrum of disciplines.**

GENERAL RECOMMENDED STANDARDS... *continued*

- ★ **Field test Spanish-language materials you have developed or translated before final production.**
- ★ **Consider pre- and post-testing any educational materials you produce in Spanish.**
- ★ **As a final check on the accuracy of the translation, have another translator translate the Spanish version back into English.** This second translator should not be given the English version. Comparing the two English versions will help you determine if the content has been accurately conveyed by the Spanish-language translation.
- ★ **Always identify the title, topic, language, target audience and source on bilingual materials.** If English and Spanish versions are produced as separate documents, then the reader needs to know the material is available in another version. For example, on the Spanish version of the brochure below, the author shows that an English version is available and gives the English title. The source is only provided in English.

EXAMPLE FOR SPANISH BROCHURE

A statement appears on this Spanish brochure to identify a companion piece by its English title:

General brochure for older Spanish-speaking women in North Carolina.
Content is similar to the English brochure “Early Detection is Your Best Protection.”

State of North Carolina, James B. Hunt Jr., Governor
Department of Health and Human Services, H. David Bruton, M.D., Secretary
Division of Community Health, N.C. Comprehensive Breast and Cervical Cancer Control Program
2,000 copies of this public document were printed at a cost of \$1,877 or \$0.94 per copy. 8/99

EXAMPLE FOR ENGLISH BROCHURE

A statement appears on this English brochure to identify a companion piece by its Spanish title:

General brochure for older women in North Carolina.
Content is similar to the Spanish brochure
“La mamografía y la prueba de Papanicolaou pueden salvar su vida.”

State of North Carolina, James B. Hunt Jr., Governor
Department of Health and Human Services, H. David Bruton, M.D., Secretary
Division of Community Health, N.C. Comprehensive Breast and Cervical Cancer Control Program
2,000 copies of this public document were printed at a cost of \$1,877 or \$0.94 per copy. 8/99

- ★ **Notify appropriate staff and agencies as Spanish-language materials become available** so others can be aware of what exists.

What can happen when clients receive culturally inappropriate materials?



The clinic physician talked with her prenatal patient Maria Gonzales about breastfeeding her baby. Maria said that she would like to breastfeed and was given a pamphlet in Spanish on breastfeeding. At the next prenatal visit, her physician could not understand why Maria's attitude toward breastfeeding had changed.

What happened to change Maria's attitude about

breastfeeding? The pamphlet given to Maria was translated into Spanish from a popular pamphlet already used in the clinic. Mrs. Gonzales speaks English but is more comfortable reading Spanish. The information on breastfeeding covered the important advantages

of breastfeeding and tips on techniques. It was illustrated with attractive photographs of women nursing their babies in both a family and park setting.

What the clinic physician did not understand was that Mrs. Gonzales was bothered by the pictures in the pamphlet that showed women exposing a portion of their breast while feeding their babies in a public setting. She was uncomfortable at the thought of exposing herself like the women in the pictures, and she knew that her husband would not approve.

- Because the pamphlet was popular with their other clients, the clinic assumed that it would be appropriate for their Spanish-speaking clients. It was unfortunate that the clinic did not first evaluate if the English materials were suitable for Hispanic women. Field testing could have made them aware that the photographs would be perceived very differently by many Spanish-speaking clients. It would have been more appropriate to produce a Spanish version that showed a respect for cultural differences. Pictures could have been used that illustrated how easy it is to use a blanket or make a simple adjustment to clothing to assure modesty when breastfeeding.

MYTH Translating English materials directly into Spanish is the best way to provide materials for Spanish-speaking clients.

FACT Printed materials often lose clarity when translated. Concepts and appeal differ between cultures. Illustrations in English materials may be confusing or offensive to clients from another culture. It is very often best to develop materials in the language of the target audience.

1 DEVELOPING SPANISH MATERIALS

Developing materials in Spanish means that the information is first written in Spanish and not just translated from an English version.

What Are the Advantages of Developing Spanish Materials?

There are many advantages to developing materials in Spanish. These include:

- Greater clarity than a word-for-word translation from an English version;
- Greater assurance that the content is accurate and consistent with agency and state recommendations;
- Materials that more appropriately reflect the culture of clients and are not confusing or offensive;
- Opportunities for field testing and revising materials to improve their effectiveness;
- Materials that are tailored to the needs of special populations, such as migrant farmworkers;
- Development of materials that are readable and at a reading level appropriate for the intended audience; and
- Incorporation of regional idiomatic language differences when appropriate and essential to convey information.

Are There Other Agencies That Need the Same Materials?

Before developing bilingual materials, local agencies should contact the state-level agency responsible for the content area of the proposed materials, for example, TB Control Branch, Division of Public Health, to discuss their need for bilingual materials and see if other local agencies are interested in the same type of bilingual materials. If there is a wide need for the material, the state-level agency may decide to assist in producing that material.

Who Will Develop the Materials?

The development of original materials in Spanish requires a bilingual professional with advanced writing skills in both languages as well as some knowledge of the subject area. This person also needs experience in producing quality educational and informational materials (see *Appendix A* for recommended qualifications and information on recruitment and hiring). Few local or state agencies will have staff with the necessary qualifications to produce quality Spanish-language materials.

Are Written Materials the Best Way To Convey the Information?

Before assuming that a written pamphlet is the best way to provide information to clients, consider that the information might be more effective if provided in another format. Clients may prefer, and the information may be more clearly conveyed by, a videotape, audiocassette or **fotonovela** (this is a presentation of information in a dramatic novelized “comic book” format using photographs rather than drawings) than by using a standard pamphlet.

Before developing your materials, seek input from clients on the type of materials they are most likely to use, such as a written brochure, fotonovela, audiocassette or videotape. You might consider using focus groups with your target population to learn what types of materials they prefer. You will need to make this decision before hiring for production to ensure that the person you hire has the specific skills needed to produce your desired final product.

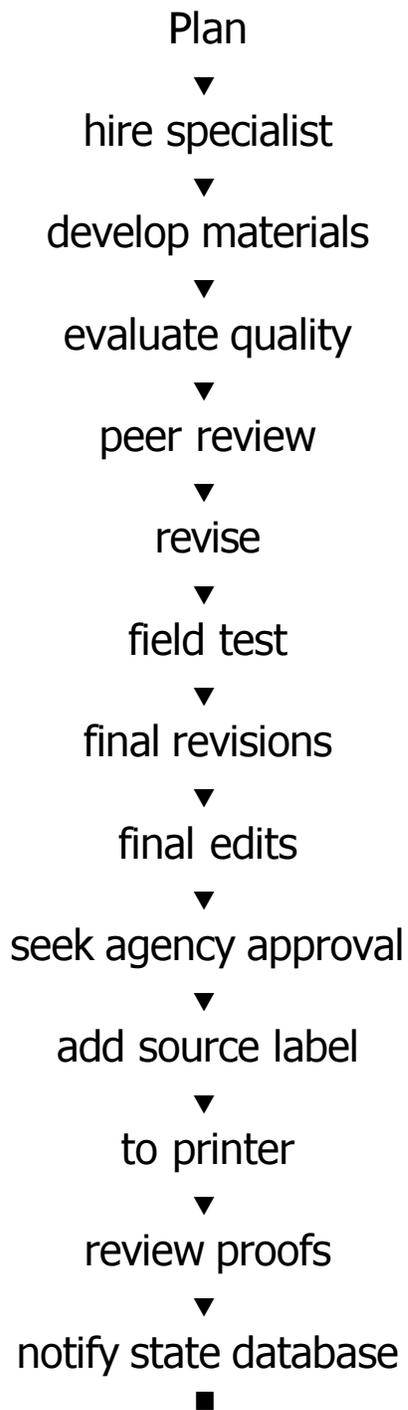


Quality Spanish Materials Should:

- *Reflect current state/local recommendations and provide up-to-date information;*
- *Accurately translate information into grammatically correct Spanish while reflecting the idiomatic characteristics of the target population;*
- *Present the information in a readable and culturally appropriate manner; and*
- *Be written at an appropriate reading level for target audiences.*

There are potentially serious consequences for agencies distributing materials that do not meet these criteria. These consequences can range from embarrassment for the agency to a potential lawsuit resulting from inaccurate information being provided to clients.

Developing Spanish Materials



RECOMMENDED STEPS FOR DEVELOPING SPANISH MATERIALS

Preliminary Agency Planning

Investigate to see if any translated version of desired materials exists in- or out-of-state. (Check the *Bilingual Materials Database*.) If existing materials are identified, then decide how you will evaluate them (*Section 3*).

Identify the target audience and determine quantity needed.

Use client focus groups or other process to determine the scope of your content and the best way to convey the information to your audience.

Determine Hiring Options

Contact the appropriate state-level agency to determine if the state could assume responsibility for producing needed Spanish-language materials.

Otherwise, decide the best option for hiring a bilingual material specialist. Possibilities include: contract; hiring for a short term or in a temporary position; or use of a volunteer with the required skills necessary to produce bilingual materials.

Recruit Qualified Applicant

Recruit a qualified individual to produce bilingual materials. Recommended credentials are in *Appendix A*.

Agencies requiring assistance in locating trained bilingual material specialists can refer to *Appendix H*.

Determine Applicant's Qualifications

For assistance in evaluating the language skill level of applicants – paid or volunteer – use the interview form (*Appendix C*).

Request assistance from trained bilingual professionals in evaluating the application (*Appendix A*).

Negotiate Terms

Negotiate the terms of the work. Cost for hiring a bilingual material specialist may approximate or exceed the cost of hiring someone to produce similar materials in English.

1 DEVELOPING

Negotiate Terms *cont.*

Negotiations should specify the bilingual material specialist's responsibility to supervise all stages of the material's development. This includes working with graphic artists, field review of the product, representation at any review boards and final production proofing.

Development Phase

The bilingual material specialist works in close partnership with appropriate staff members and assumes a lead role in developing the document. Agency staff should remain actively involved in the content development stage, since even the most qualified bilingual material specialist will lack expertise in technical areas. Content accuracy is the responsibility of the agency producing the material, but the accuracy of the Spanish is the responsibility of the bilingual material specialist. Specify the target audience and the appropriate reading level for the materials.

Review the tips on making materials easy-to-read. These can be useful at different stages. It's a good idea to tailor this checklist to your own needs (*Appendix F*).

Readability Evaluation

Evaluate readability of any written materials (*Appendices E and F*).

Professional Peer Review

At the completion of a draft product, send out materials for peer review to state and local bilingual professionals. Remember to include an English version of any materials so that the accuracy of the translation can be evaluated.

Ask a different trained translator to translate the Spanish version back into English. This person **should not** be given the English version. This is an excellent way to check for mistranslation. Compare the back-translated version with the original English version for retention of content accuracy.

Revisions

The bilingual material specialist and staff meet to discuss recommendations of the peer review. Make necessary revisions. Agencies often find that there are differences in reviewers' edits of foreign-language materials. This can make it difficult to decide on the most correct usage. Remember that the same thing happens when you send English materials for review because of differences in writing styles and vocabulary preferences. It is important at this point to distinguish between differences in grammatical construction and

| | |
|--------------------------------------|--|
| Revisions cont. | usage, and incorrect grammar and spelling. Rely on the translator to make final decisions. However, if there are unresolved concerns about the accuracy of the translation, contact the N.C. Bilingual Resource Group for consultation regarding alternatives. |
| Field Test | Field test the revised material with the target audience. The material should be tested for clarity, readability, cultural appropriateness and accuracy. Consider pre- and post-testing to evaluate the materials for effectiveness. |
| Final Revisions | The bilingual material specialist meets with staff to discuss the results of the field testing and make any necessary revisions. |
| Final Editing | With assistance from the bilingual material specialist, complete final proofreading of document for errors. In English, identify the title, topic, language, source and audience on the materials. Include cost statement, if required. |
| Agency Review Process | Submit final draft to any internal review process required by your agency. |
| Production | Proceed with final production of materials. |
| Review of Camera-ready Proofs | Review camera-ready proofs before proceeding with printing. This is particularly important if the materials were typeset by the printer and not printed from your disk. Typographical errors can easily occur at this point, and the Spanish punctuation must be carefully checked for completeness and accuracy. |
| Notification | Notify appropriate staff and agencies as Spanish-language materials become available. Send a copy of the materials (English and Spanish versions) to the DHHS Bilingual Materials Database, Division of Public Health, Refugee Health Program, 1915 Mail Service Center, Raleigh, N.C. 27699-1915 or by Courier 56-20-11. |

1 DEVELOPING

RECOMMENDED STANDARDS FOR DEVELOPING SPANISH MATERIALS

- **Define a policy for your agency that sets standards for developing bilingual materials.** This policy should address minimum qualifications for staff developing bilingual materials; the need for a review process and field testing; and the need for pre- and post-testing of educational materials.
- **Consider developing materials in Spanish rather than just translating an English version.** Doing so will better assure that materials are culturally appropriate.
- **Use a trained bilingual material specialist to develop materials.** See *Appendix A* for recommended qualifications.
- **Always produce an English version of any Spanish-language materials.**
- **When possible, include English and Spanish text in the same document.**
- **On all materials identify the title, topic, language, target audience and source.**

EXAMPLE FOR SPANISH BROCHURE

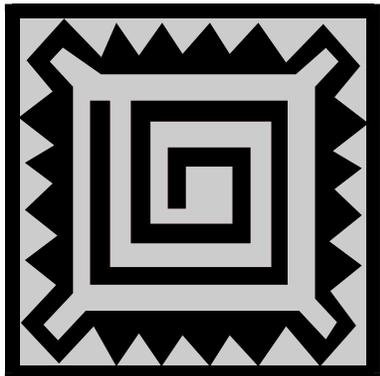
A statement appears on this Spanish brochure to identify a companion piece by its English title:

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2,000 copies of this public document were printed at a cost of \$1,877 or \$0.94 per copy. 8/99

- **Send drafts of the document to bilingual professionals representing related disciplines.** Include an English version and your version of the checklist (*Appendix F*).
- **Field test materials with your target audience before final production.** This is essential to ensure vocabulary choices, message clarity, readability and cultural appropriateness.
- **Consider pre- and post-testing** to evaluate educational materials for effectiveness with the target audience.
- **Notify appropriate staff and agencies as Spanish-language materials become available** so others can be aware of what exists.

What can happen if materials are not accurately translated into Spanish?



Nurse: *Your baby looks as though she has not been bathed. Do you have a place to bathe her?*

Mother of two-week-old infant: *After she was born, the hospital gave me a paper, and it said that I should not bathe her.*

What happened here?

At the time of discharge from the hospital, this Spanish-speaking new mother received a pamphlet written in Spanish. The pamphlet said, “No bañe a su bebé.” In Spanish the phrase means “do not wash the baby at all.” Following these directions, the mother had not washed the baby at all. What the hospital intended was for the mother to keep the umbilical cord dry by not giving the baby a tub bath.



This is an example of an unfortunate miscommunication. Had the instructions involved medications, this mistranslation could have had even more serious consequences for this newborn baby. Translating information into another language requires that the translator recognize very subtle differences in the meaning of words and phrases in both languages. This requires a very high level of writing expertise in both languages. It also requires familiarity with idiomatic differences that exist among different Spanish-speaking populations.

MYTH The interpreter for an agency is the ideal person to translate educational materials and forms into Spanish.

FACT Accurate written translations require an advanced level of writing composition skills in both Spanish and English. Few interpreters have the technical skills necessary to produce quality written materials.

2 TRANSLATING MATERIALS INTO SPANISH

When Should Materials Be Translated into Spanish?

Before translating any existing materials for use with Spanish-speaking clients, agencies must consider first if the English material's content is appropriate for this population. If existing materials are not appropriate, then original or adapted materials should be developed in Spanish.

Once a decision has been made to translate existing materials into Spanish, there are several factors that should be considered. It is a common mistake for an agency with an interpreter on staff or with a bilingual staff member to give the task of translating written information to that person. In most cases, that person will not have the necessary writing skills in both languages to produce an accurate translation. Written translations require an advanced level of linguistic skills in both languages as well as an awareness of the different idioms that exist among Spanish-speaking countries. *Appendix A* provides information on evaluating the qualifications of translators.

Agencies must also consider how to present the translated version. Your decision as to which option to choose will depend on the length of the document and how much room the information and illustrations require; for example, is there enough room to add the Spanish translation on the same page? Field testing with clients and staff suggests that having both versions in the same document is preferred. However, the appearance of the document is important, and adding the Spanish translation should not make it appear cluttered and confusing to clients.

When deciding how to produce English and Spanish versions of materials, possible options to consider include:

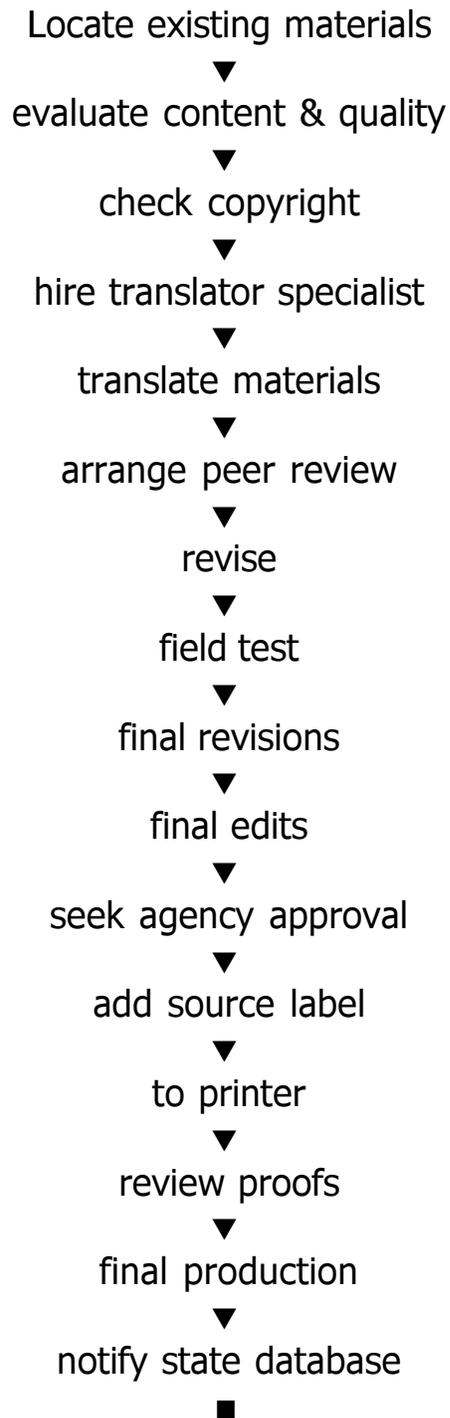
- Providing separate English and Spanish versions;
- Producing a single document with Spanish and English text in different parts. For a one-page document, the Spanish may be on the back of the English version. For longer documents, the Spanish and English versions are in the same document but in separate sections;
- Printing the Spanish under each line of English text (this can be more useful for forms than running text); or
- Placing the Spanish version as a block adjacent to the English version.

Quality Spanish Materials Should:

- *Reflect current state/local recommendations and provide up-to-date information;*
- *Accurately translate information into grammatically correct Spanish while reflecting the idiomatic characteristics of the target population;*
- *Present the information in a readable and culturally appropriate manner; and*
- *Be written at an appropriate reading level for target audiences.*

There are potentially serious consequences for agencies distributing materials that do not meet these criteria. These consequences can range from embarrassment for the agency to a potential lawsuit resulting from inaccurate information being provided to clients.

Translating Materials into Spanish



RECOMMENDED STEPS FOR TRANSLATING MATERIALS INTO SPANISH

| | |
|---------------------------------------|--|
| Locate Existing Materials | Find out if a translated version of materials desired already exists in- or out-of-state. (Check the <i>Bilingual Materials Catalog</i> .) If materials are identified, then decide how to evaluate (<i>Section 3</i>). |
| Evaluate English Materials | <p>If quality translated materials are not available, then determine if the English version is suitable for translation. Look at content accuracy, cultural appropriateness, readability and compliance with state policy.</p> <p>If translation of the materials as they are written would not be appropriate for your Spanish-speaking clients, then refer to <i>Section 1</i>.</p> <p>Because it is a waste of resources for multiple agencies to pay for translations of similar materials, contact state and regional consultants regarding the possibility of interagency coordination to produce needed translations.</p> |
| Check Copyright | Determine if the materials to be translated are subject to copyright restrictions and, if necessary, obtain written permission to translate and reproduce. |
| Determine Hiring Options | <p>Decide the best option for hiring a translator. Possibilities include: contract; hiring for a short term; a temporary position; or possibly using a volunteer with the qualifications described in <i>Appendix A</i>.</p> <p>Explore the possibility of sharing a translator position with another office in your agency that also has materials to be translated.</p> <p>Contact the N.C. Bilingual Resource Group (<i>Appendix I</i>) for persons to contact with experience in the hiring process, referrals, resources or costs.</p> |
| Recruit a Qualified Translator | Recruit an individual with the necessary qualifications to translate English materials into Spanish. Refer to the recommended credentials described in <i>Appendix A</i> . If the materials needing translation include technical terms, the person should have knowledge and experience in translating materials in that subject area. |

2 TRANSLATING

Recruit a Qualified Translator (cont.)

Agencies requiring assistance in locating a professional translator can refer to *Appendix H* for sources for professional translators or may contact the N.C. Bilingual Resource Group (*Appendix I*).

Evaluate Applicant's Credentials

For assistance in evaluating the skill level of potential translators – paid or volunteer – use the interview form (*Appendix C*).

If necessary, seek assistance from trained bilingual professionals to evaluate the application (*Appendix A*).

Negotiate Terms

After determining the most qualified applicant, negotiate the terms of the work. Translators may charge based on a per word or per page basis or may charge by the document, particularly in the case of pamphlets or posters. The cost for translating highly technical or specialized materials may be higher.

Negotiations should stipulate that the translator remains involved to see the project through to completion, from proofreading the translation to making final revisions after the review process. Content accuracy is the responsibility of the agency producing the translation, but the translation of the document is the responsibility of the translator.

Professional Peer Review

At the completion of a draft translation, the document should be sent out for peer review to state and local bilingual professionals. Remember to include the English version of any translated materials so that the accuracy of the translation can be evaluated.

Ask a different trained translator to translate the Spanish version back into English. This person **should not** be given the English version. This is an excellent way to check for mistranslations. Compare the back-translated version with the original English version for retention of content accuracy.

The translator meets with staff to discuss recommendations of the peer review.

Revisions

Agencies will often find that there will be differences in reviewers' edits of translated documents. This can make it difficult to decide on the most correct usage. Remember that because of differences in writing styles and

| | |
|---|--|
| Revisions (cont.) | <p>vocabulary preferences, the same thing happens when you send English materials for review. It is important at this point to distinguish between differences in grammatical construction and usage, and incorrect grammar and spelling. Any review comments should be discussed with the translator, and unless there is consistent disagreement in the review comments, you should probably leave final edits to the discretion of your translator. However, if there are unresolved concerns about the accuracy of the translation, contact the N.C. Bilingual Resource Group for consultation regarding alternatives.</p> |
| Field Test | <p>Field test the revised document with the target population. The document should be tested for clarity, cultural appropriateness, readability and accuracy. Pre- and post-testing can greatly enhance evaluation of the translation.</p> |
| Final Revisions | <p>Meet with the translator to discuss the results of the field testing. Make any necessary revisions.</p> <p>Ensure that the title, topic, source, language and audience are identified in English on Spanish materials, and indicate if an English version exists.</p> |
| Final Editing | <p>With the assistance of the translator, complete final proofreading of document for errors.</p> <p>Include a cost statement, if required.</p> |
| Agency Review Process | <p>Submit final draft to any internal review process required by your agency.</p> |
| Production | <p>Proceed with production of translated materials.</p> |
| Review of Galley Proofs from the Printer | <p>Review camera-ready galley proofs from the printer before proceeding with printing. Have translator also review proofs for errors. This is particularly important if the materials were typeset by the printer. Typographical errors can easily occur at this point and must be corrected by the translator.</p> |

2 TRANSLATING

Notification

Notify appropriate staff and agencies as Spanish-language materials become available.

Send a copy of the materials (English and Spanish versions) to the DHHS Bilingual Materials Database, Division of Public Health, Refugee Health Program, 1915 Mail Service Center, Raleigh, N.C. 27699-1915 or by Courier 56-20-11.

RECOMMENDED STANDARDS FOR TRANSLATING MATERIALS INTO SPANISH

- **Define a policy for your agency on translating materials into Spanish.** This policy sets minimum standards for translator qualifications, peer review and field testing.
- **Before translating any materials, first evaluate their appropriateness for the target audience.**
- **Use a trained bilingual material specialist to translate materials.**
- **Do not use a computerized translation program to translate materials. They are not accurate.**
- **Provide an English and a Spanish version of the materials.**
- **When possible, include the English and Spanish text in the same document.**
- **On the materials identify the title, topic, language, target audience and source.**

EXAMPLE FOR SPANISH BROCHURE

A statement appears on this Spanish brochure to identify a companion piece by its English title:

General brochure for older Spanish-speaking women in North Carolina.
Content is similar to the English brochure “Early Detection is Your Best Protection.”

State of North Carolina, James B. Hunt Jr., Governor
Department of Health and Human Services, H. David Bruton, M.D., Secretary
Division of Community Health, N.C. Comprehensive Breast and Cervical Cancer Control Program
2,000 copies of this public document were printed at a cost of \$1,877 or \$0.94 per copy. 8/99

- **Send translated materials for review by bilingual professionals** representing a broad spectrum of disciplines. Include an English version and your version of a checklist (*Appendix F*).
- **Field test new materials with your target audience before final production.** This is essential to ensure vocabulary choices, message clarity, readability and cultural appropriateness.
- **Consider pre- and post-testing** to evaluate educational materials for effectiveness with the target audience.
- **Notify appropriate staff and agencies as Spanish-language materials become available** so others can be aware of what exists.

Aren't Existing Spanish Materials OK To Use?



The communicable disease nurse at a local health department realized that in the past few years, the number of Spanish-speaking clients coming to the health department had increased tremendously. Staff providing HIV testing needed materials in Spanish that explained HIV testing and counseling. The nurse ordered copies of a brochure in Spanish on HIV from another state and was very pleased to have something in Spanish to give to clients to explain HIV testing and counseling services.

What is the problem with this scenario?

- ◆ The brochure in Spanish did not have an English version. Although the brochure was about HIV testing, the staff did not know that it addressed what to do if you are HIV positive. Any clients given this brochure would think they were HIV positive.
- ◆ The brochure had several serious translation errors that could confuse clients. The staff assumed that since the brochure was produced by a state department of health, it had been reviewed for accuracy of translation and cultural appropriateness. Very few states have any review process for bilingual materials. Just because it was produced by a state health department was no assurance that it was translated accurately into Spanish.
- ◆ The reading level of the brochure was far above the average reading level of the health department's clients.

All materials from outside sources should be submitted to a review process before being published. All agencies need to define their review process for foreign-language materials. They need to assign responsibility for ensuring that materials distributed to the intended audience are accurate in content and translation, and are appropriate in reading level and presentation.

MYTH You can assume that Spanish-language materials obtained from catalogs or agencies are high quality and accurately translated.

FACT Ordering bilingual materials from an agency or catalog is no assurance of quality. Few state agencies have review criteria or a process for evaluating the quality of bilingual materials.

Why Review Existing Spanish Materials?

Agencies may obtain Spanish-language materials from a variety of outside sources. Often, agencies are desperate for something in Spanish to give to clients, and they may order or copy materials without first evaluating them. It is essential that agencies have a review process to determine if the materials:

- ◆ Are accurately translated;
- ◆ Are culturally appropriate;
- ◆ Reflect agency and state guidelines;
- ◆ Contain content that is accurate and current;
- ◆ Are at an appropriate reading level; and
- ◆ Are written with idioms known to the Spanish-speaking population being served.

If agencies use materials without first carefully reviewing them, they have no assurance as to the materials' content accuracy, suitability, or quality. Later, an agency may find that it has provided materials to clients with information that was incorrect or presented in a way that was offensive. For example, a brochure on Hepatitis B produced in New York might be used in North Carolina to fill an urgent need for something about Hepatitis in Spanish. However, generally Hispanics/Latinos in New York arrive from Cuba and Puerto Rico, unlike most Hispanics/Latinos in North Carolina who arrive from Mexico. The New York brochure may not be appropriate because of differences in the target audiences' language and culture. This is why reviewing all materials before providing them to clients is so important.

Agencies have long recognized the importance of reviewing English-language educational materials before distributing them to clients. It is equally important to evaluate Spanish-language materials against established agency standards for clarity, accuracy of content, readability, visual appeal and reading level.

Quality Spanish Materials Should:

- ◆ *Reflect current state/local recommendations and provide up-to-date information;*
- ◆ *Accurately translate information into grammatically correct Spanish while reflecting the idiomatic characteristics of the target population;*
- ◆ *Present the information in a readable and culturally appropriate manner; and*
- ◆ *Be written at an appropriate reading level for target audiences.*

There are potentially serious consequences for agencies distributing materials that do not meet these criteria. These consequences can range from embarrassment for the agency to a potential lawsuit resulting from inaccurate information being provided to clients.

3 REVIEWING

What To Consider When Reviewing Spanish Materials

As English materials are reviewed for certain criteria, Spanish-language materials should also meet standards (see **Standards** in this section). The material should focus on the following criteria:

Content

- ◆ Is the message clear?
- ◆ Is the text too long? Does it contain too many concepts?
- ◆ Is the content accurate and consistent with current agency and state recommendations and guidelines?
- ◆ Is an English version of the material available or will you have to translate the material into English to evaluate the accuracy of its content?
- ◆ Does the material contain information or illustrations that might be offensive to the audience?

Language

- ◆ Is the Spanish grammatically correct? Are words spelled correctly?
- ◆ Are the idioms appropriate for your Spanish-speaking clients; for example, if your clients are from Mexico, is this information written using the idioms common in Mexico or is it intended for a Cuban audience?

Readability

- ◆ What assurances do you have that the reading level of the final product is appropriate?
- ◆ Is the format easy-to-read? For example, it has no more than 3 or 4 concepts balanced with white space and graphics. (*Appendix F* is a checklist that can be tailored to your needs.)

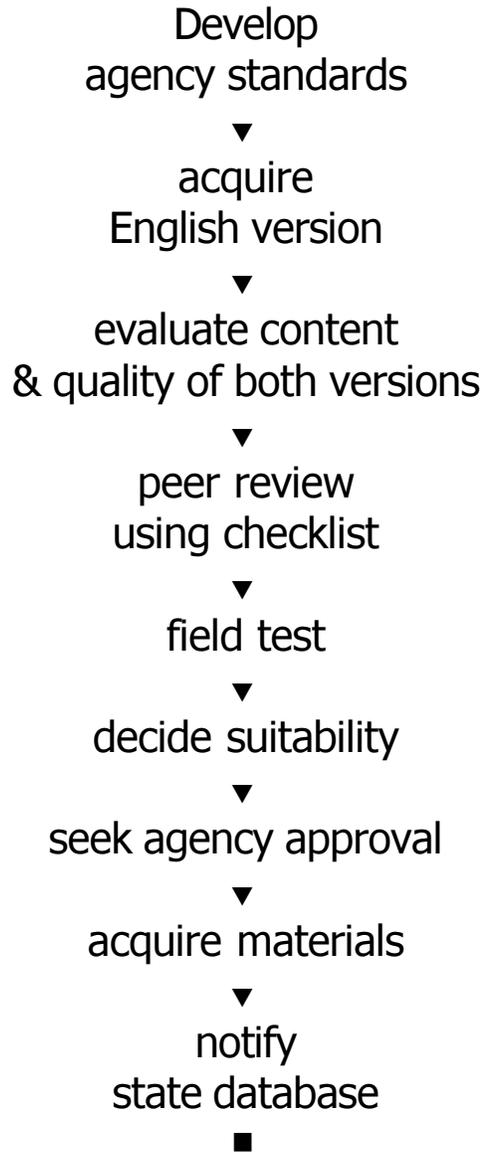
Cultural Appropriateness

- ◆ Is the **information** presented in a culturally appropriate way, including gender, age and lifestyle?
- ◆ Is the **message** culturally appropriate? Is there anything in the text or illustrations that might be offensive to your clients?
- ◆ Are the **illustrations** and **recommendations** appropriate if your clients are a special population, such as migrant farm workers?
- ◆ Is the **format** appropriate for the target audience, such as a printed brochure vs. an audiotape? Is the target audience familiar with the format used and prefer it as a source of information? Is it a credible source of information?

Compliance with Agency Policy

- ◆ Is there an English version?
- ◆ Does the material require a cost statement?
- ◆ Will the material need to be submitted to any internal review process?
- ◆ Are the source, topic, language, title and audience identified in English?
- ◆ Is the content in line with agency policy and recommendations?

Reviewing Spanish Materials



3 REVIEWING

RECOMMENDED STEPS FOR REVIEWING SPANISH MATERIALS

| | |
|--|--|
| Develop Standards and Checklist | <p>Develop agency standards for Spanish-language materials that must be met before distribution to the target audience.</p> <p>Develop a Writer’s or Reviewer’s Checklist that can be used whether writing or reviewing materials (<i>Appendix F</i>).</p> <p>If an English version is not available, have a trained translator translate information into English.</p> |
| Acquire English Version | <p>If you do not have someone on staff capable of evaluating materials for quality, see the bilingual resources listed on page 54.</p> |
| Evaluate Content of English Version | <p>Determine if content is accurate and current. If not, reject.</p> |
| Evaluate Spanish Version | <p>Have a trained Bilingual Professional determine</p> <ul style="list-style-type: none">... if the Spanish is grammatically correct and the idioms are appropriate... if the language, illustrations and reading level are culturally appropriate... if the materials are easy-to-read (<i>Appendix E</i>)... if there are any errors in punctuation, spelling, or accent marks |
| Professional Peer Review | <p>Send English and Spanish versions of the materials and your checklist to bilingual professionals for their review and comments.</p> <p>Review for – content accuracy; completeness of information; consistency with current recommendations; compliance with state policy; message clarity</p> <p>Evaluate reviewers’ comments and decide if material merits further consideration.</p> |

Client Field Testing

Field test the materials with a select group of your target audience.

If these are educational materials, the use of pre- and post-testing are also recommended.

Review for – readability; offensive language, illustrations, graphics; message clarity; number of easy-to-identify points; cultural appropriateness

Refer to *Appendix F* for a sample checklist of criteria to determine if materials are easy-to-read.

Make Final Assessment

Review the field testing results and decide if materials are suitable for your target audience.

Seek Agency Approval

Submit proposed materials to any required agency review process.

If the English version is separate, add a label that identifies the name of the Spanish version.

On the Spanish version, if it is not printed on the document, add a label with: title, topic, source, language and target audience in English.

If you are planning to print, see if you need to add a cost statement.

Acquire Materials

Proceed with acquiring materials by printing, purchase or donation.

If necessary, obtain permission to copy or reprint from the copyright owner.

Notification

Notify appropriate staff and agencies as Spanish-language materials become available.

Send a copy of the materials (both English and Spanish versions) to the Bilingual Materials Database, NC DHHS Division of Public Health, Refugee Health Programs, 1915 Mail Service Center, Raleigh, N.C. 27699-1915 or by Courier 56-20-11.

Remember

Like English materials, Spanish pieces need to be reviewed regularly to ensure that recommendations, guidelines and regulations are still current.

3 REVIEWING

RECOMMENDED STANDARDS FOR REVIEWING SPANISH MATERIALS

- ◆ **Define a policy for your agency for reviewing bilingual materials.**
- ◆ **Do not provide clients with any Spanish materials unless you have an English version.** If none is available, you will need to have the information translated into English before the materials can be reviewed.
- ◆ **Review materials with bilingual professionals** representing a broad spectrum of disciplines. Include an English version and your version of the checklist (*Appendix F*).
- ◆ **Field test new and existing materials with your target audience.** This is essential to ensure appropriate vocabulary choices, message clarity, readability and cultural appropriateness.
- ◆ **Consider pre- and post-testing** to evaluate educational materials for effectiveness with the target audience.
- ◆ **Before distributing to clients, label the materials** to identify the title, topic, language, target audience and source.

EXAMPLE FOR SPANISH BROCHURE

A statement appears on this Spanish brochure to identify a companion piece by its English title:

General brochure for older Spanish-speaking women in North Carolina.
Content is similar to the English brochure “Early Detection is Your Best Protection.”

State of North Carolina, James B. Hunt Jr., Governor
Department of Health and Human Services, H. David Bruton, M.D., Secretary
Division of Community Health, N.C. Comprehensive Breast and Cervical Cancer Control Program
2,000 copies of this public document were printed at a cost of \$1,877 or \$0.94 per copy. 8/99

- ◆ **Notify appropriate staff and agencies** as Spanish-language materials become available so others can be aware of what exists.

- A Recruitment of Bilingual Professionals**
 - Rationale
 - Recommended Qualifications for Paid or Volunteer Bilingual Material Specialist for Spanish
- B Questions To Ask a Potential Translator**
- C Spanish Interpreter/Translator Application and Interview Form**
- D Readability and Spanish Materials**
 - How Important Are Easy-To-Read Materials for Clients?
 - Readability and Readability Formulas
- E Readability Resources**
 - Distinctions Between English and Spanish Text
 - Tips for Making Spanish Materials Readable
 - Recommendations for Determining Reading Grade Level Without Using a Readability Formula
- F Sample Checklist for Developing Easy-to-Read Print Materials**
- G References**
- H Resources: North Carolina, National**
- I The N.C. Bilingual Resource Group**

APPENDIX A

Recruitment of Bilingual Professionals

Rationale

The quality of currently available Spanish-language materials can vary considerably. Machine translations tend not to be accurate. Evaluating foreign-language materials for many agencies is an unfamiliar process and requires specialized skills beyond the scope of most agencies.

Developing and translating materials into Spanish requires an even more advanced level of specialized skills than those required for oral interpretation. Few agencies have the staff with the necessary skills to perform these tasks.

Translating and developing Spanish-language materials cannot be delegated to someone merely on the basis of fluency in Spanish. Native speakers do not necessarily have the skills essential to produce Spanish materials that meet the recommended criteria for quality, and they may not be aware of important idiomatic and cultural variations that exist among various Spanish-speaking countries.

Recommended Qualifications for Paid or Volunteer Bilingual Material Specialist for Spanish

Producing materials for public distribution requires considerable expertise and experience in the subject area as well as technical skills related to materials production. Requirements may vary depending on the desired format of the materials and the technical complexity of the subject matter.

Recommended qualifications include:

- ▶ A college degree with a high level of fluency in writing *both* English and Spanish;
- ▶ A demonstrated ability to write in Spanish at a reading level appropriate to intended target audiences;
- ▶ Considerable knowledge of the subject area, vocabulary, and technical terms, and experience in producing materials in that area;
- ▶ Knowledge of idiomatic language differences among Spanish-speaking countries;
- ▶ Technical skills related to materials development, including computer literacy and copyediting;
- ▶ Familiarity with graphic arts so specialist can work with a graphic artist in ensuring readability and in determining appropriateness of illustrations, photographs and other elements;
- ▶ Familiarity with the culture and reading level of the target audience; **OR**
- ▶ An equivalent combination of education and experience.

Applicants should be asked to provide samples of materials produced and should be required to provide a writing sample in both English and Spanish.

Unfortunately, at present, there is not a national or state certification process to assist agencies in evaluating the qualifications of translators. Agencies should require that persons – paid or volunteer – agreeing to translate should meet the minimum recommended qualifications just described.

Questions To Ask a Potential Translator

- 1. Are you a native speaker? If not, how did you learn the target language?**
If the target language is not the translator's native language, then you should have a native speaker proofread the translation. Some translators will include proofreading services when quoting a translation.
- 2. What country are you from? Were you born, raised and/or educated there?**
To keep a native language alive, a person must speak it with other native speakers. If a person lives in the United States for a long time and does not practice the language continuously, his or her skills deteriorate.
- 3. Have you had formal education (college) in the target and/or source language?**
Some translators may not have received formal education in a Spanish-speaking country. Educated Spanish speakers have no problem understanding one another, even if they are from different Spanish-speaking countries, and so will be more likely to produce "Generic Spanish."
- 4. Are you a professional translator? Can you provide professional credentials and references?** Some translators work between jobs or as a spare-time activity. Look for a long-term history of translation experience, not simply a person who has free time and speaks both languages. The translator should be affiliated or accredited by the American Translators Association (ATA) or its local chapter, The Carolina Association of Translators and Interpreters (CATI).
- 5. How do you charge: per word? per page? per project?** Usually translations are charged by the word, but it depends on the final product. The translator may be expected to be creative when translating a brochure or an ad piece, and a fee per project may apply.
- 6. What is your normal turn-around time?** The average for 10 pages or less is 2 days, or 10,000 words per week. Generally speaking, the longer you give a translator to work on a project, the higher quality he or she will deliver. It also helps to provide your translator with as much reference material as possible.
- 7. What word processing system do you use?** Is it compatible with your system or the printer's system? Will you provide a hard copy and a floppy disk?
- 8. Do you use Spanish translation computer software?** Computer translation packages do not translate words correctly in every context. A professional translator must proofread a computer translation.
- 9. If final copy needs to be printed in a special format, is there an additional charge for proofreading?** Some translations may have a more complex format than others, such as fitting text around graphics. Spanish text is 25% to 30% longer than the English version. If you are changing the format of the disk provided by the translator, verify that the accents were kept. The translator needs to see camera-ready material.

SOURCE: Bilingual Communications, Inc., Cary, North Carolina. 1996.

APPENDIX C

Spanish Interpreter/Translator Application and Interview Form

This form is to supplement the agency application form to assist in evaluating an individual's bilingual skills. Refer to page 54 for assistance in reviewing these applications.

Name _____
First Middle Last

Address _____

Phone (Day) () _____ **(Evening)** () _____

SECTION A: INTERPRETATION /TRANSLATION EXPERIENCE

1. Area(s) of Expertise: Check as many as appropriate:

Business Health/Medical Legal Government

Other (please specify) _____

2. Résumé enclosed? Yes No

3. Using only the space below, briefly describe or list your experience(s) working as an interpreter and/or translator. Include number of years, types of agencies and position titles. Also note whether it was full-time or part-time.

| Position | Agency | # Years | Full- or Part-time | Supervisor / Phone |
|----------|--------|---------|--------------------|--------------------|
|----------|--------|---------|--------------------|--------------------|

| | | | | |
|-------|-------|-------|-------|-------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

SECTION B: WRITTEN TRANSLATION EXPERIENCE

(If this does not apply to you, skip to Section C.)

1. List translations completed: (If there are too many, just include a sample list of health-related work completed.) Please enclose a copy of your work, i.e., a completed translation and its original English version.

| Title | No. of Pages | Language | Organization | Year |
|--------------|---------------------|-----------------|---------------------|-------------|
|--------------|---------------------|-----------------|---------------------|-------------|

SECTION C: EDUCATIONAL BACKGROUND

Please include specific interpretation/translation and/or certification-related training.

| Schools Attended | Location | Area of Study | Degree/Yrs. Attended |
|-------------------------|-----------------|----------------------|-----------------------------|
|-------------------------|-----------------|----------------------|-----------------------------|

APPENDIX C

SECTION D: LANGUAGE PROFICIENCY

Please rate your language skills using the scale below. Compare yourself to native speakers.

very limited = have much trouble talking with native speakers who have high school education

limited = could use help in talking with native speakers who have high school education

adequate = like the average native speaker with a high school education

good = like most native speakers with college education

superior = better than most native speakers with college education

Language One _____ Country/Region _____

| | very limited | limited | adequate | good | superior |
|------------------------------|--------------|---------|----------|------|----------|
| verbal ability, oral | | | | | |
| verbal ability, written | | | | | |
| vocabulary, general | | | | | |
| idioms, regional differences | | | | | |

Language Two _____ Country/Region _____

| | very limited | limited | adequate | good | superior |
|------------------------------|--------------|---------|----------|------|----------|
| verbal ability, oral | | | | | |
| verbal ability, written | | | | | |
| vocabulary, general | | | | | |
| idioms, regional differences | | | | | |

Language Three _____ Country/Region _____

| | very limited | limited | adequate | good | superior |
|------------------------------|--------------|---------|----------|------|----------|
| verbal ability, oral | | | | | |
| verbal ability, written | | | | | |
| vocabulary, general | | | | | |
| idioms, regional differences | | | | | |

Please Sign: Name _____ Date _____

APPENDIX D

Readability and Spanish Materials

How Important Are Easy-To-Read Materials for Clients?

Many written materials in Spanish already exist. There are also many English materials awaiting translation into Spanish. One of the main questions before using either of these materials is whether or not the material is readable. For many reasons, these materials may not be appropriate.

Regarding English materials, research shows that many health education materials and consent forms are written at a college and scientific level of reading. However, in the United States, people read generally at or below the 8th-grade level. Therefore, a serious gap exists between the level at which such materials are written and the reading and comprehension levels of the general public. The gap between reading and comprehension in **English** clients has created problems for clients who are unable to understand their rights and responsibilities as explained in consent forms, for example. It has also caused frustration for staff who administer these forms or provide supporting health education materials.

Within any population, individuals' reading levels will vary. Based on research, recommendations are available for writing English materials that are readable. These include good organization, a clear writing style, a familiar format and an appropriate reading level (on average, between 6th and 8th grade in North Carolina). Research also shows that when given the choice at health fairs or in doctors' offices, most people, regardless of reading level, will select materials that are attractive (i.e., appear easy to read with appropriate illustrations, white space and type size). Research shows that individuals who read at the 5th-grade level and below can be better reached by using materials other than written, such as videos and tape recordings.

Quality Spanish Materials Should:

- ▶ *Reflect current state/local recommendations and provide up-to-date information;*
- ▶ *Accurately translate information into grammatically correct Spanish while reflecting the idiomatic characteristics of the target population;*
- ▶ *Present the information in a readable and culturally appropriate manner; and*
- ▶ *Be written at an appropriate reading level for target audiences.*

There are potentially serious consequences for agencies distributing materials that do not meet these criteria. These consequences can range from embarrassment for the agency to a potential lawsuit resulting from inaccurate information being provided to clients.

Readability and Readability Formulas

Readability formulas are widely used to determine the reading grade level of written material. They measure the structural difficulty based on factors such as word length, sentence length and number of words having three or more syllables. But they reflect only one part of the readability picture: complexity of structure. Other factors play key roles but are more subjective – writing style, format, organization, audience’s prior knowledge of the topic and motivation, to name a few.



A popular written material for Hispanics/Latinos is the fotonovela, where information is presented as a dramatic novelized “comic book” format using photographs rather than drawings.

Although measuring reading grade level has its place in helping to determine readability, it is only one of several tools. While these formulas are quick and useful tools for English materials, a suitable formula for measuring reading grade level of Spanish materials has been difficult to develop due to the nature (word length and language complexity) of the Spanish language. The N.C. Bilingual Resource Group, as author of these guidelines, has found that adequate tools to measure the reading grade level of Spanish materials are not available at this time.

So how do we determine if materials are readable by Hispanics in North Carolina? Refer to the tips in *Appendix E*.

APPENDIX E

Readability Resources

Studies show that people can understand what they read only if it is effectively designed and written at their reading level. Whether you are developing your own materials or acquiring existing materials, it is important that your target audience be able to read and understand the material.

As noted in Appendix D, the N.C. Bilingual Resource Group, as author of these guidelines, has found that adequate tools to measure the reading grade level of Spanish materials are not available at this time. The goal, then, is to gain a sense of your audience's reading grade level, and use that information to make materials as readable as possible. The following tips can help guide your bilingual material specialist when determining the reading grade level of the target audience without use of a mathematical formula. Also included are tips for making materials readable, including a checklist that can be adapted for use with writers or reviewers.

EXAMPLE of directions for bathing a newborn baby

English: Do not bathe your baby (meaning immersing your baby's umbilical cord in bath water).

Translation: "No bañe a su bebé," which literally means "Do not bathe your baby at all."

Result: Parents were not bathing their babies.

Distinctions Between English and Spanish Text

Not only do the words written in Spanish and English vary in word length, but also some of the message concepts may need to be written differently. Here are a few examples, followed with some tips on making Spanish text readable:

- ▶ Words written in Spanish generally are longer than those in English so will require more space.
- ▶ A Spanish audience may be more familiar with the metric system (kilograms for pounds, liter for quart).
- ▶ The spoon size may be different from what is used in the United States. Check with the target audience for preferred terms.
- ▶ The family is highly valued. When developing messages, show honor to the family as well as to the culture. Try to present the message in the context of the family or culture. A good example is the National Cancer Institute's brochure "Your family deserves the best foods" or its cookbook "Celebrate the Hispanic Kitchen."
- ▶ Graphics, diet lists and procedures may not translate with the same meaning in other languages.

Tips for Making Spanish Materials Readable

Many resources are available for making English materials readable. In many cases, these can be adapted to Spanish materials with these distinctions, to name a few:

- ☑ Include more culturally sensitive illustrations that reflect the audience. This means any pictures would show members of the target audience in a situation that is realistic and credible. For example, when older Hispanic women gather to talk, do they meet around the kitchen table? Can the women targeted in the brochure relate to the women around the table? Don't assume that one picture can be used for different target groups.
- ☑ Artwork needs to be medically accurate such as showing the dentist wearing gloves and a face mask.
- ☑ Allow more room. Words written Spanish often take up more room than written English.
- ☑ Layout needs to be attractive and appealing.
- ☑ Design materials that convey messages without the use of words. Remember that a photo caption may be all a person has time to read.
- ☑ “Cultural acceptability: Is the message in any way offensive? Is it perceived as true? Are there any annoying elements? Hair styles, jewelry, dress and background settings will all enhance or detract from cultural suitability. The ways that deeper aspects of culture may be presented or alluded to also strongly influence cultural acceptance. Such aspects include child-rearing practices, roles of men and women, views about birth and death.” (Root, p. 169)

Formats Other than Written Materials

“Many patients don’t read well in any language. Before deciding to [produce written materials,] ask an interpreter to talk with a sample of the target population to see if the content (e.g., instructions) needs to be in that language or whether another format like a video or a simplified written version with lots of illustrations could meet their needs just as well.”

(Doak, Doak and Root, 1996, 67.)

Recommendations for Determining Reading Grade Level Without Using a Readability Formula

If you choose to use some of the suggestions here, remember that once English materials of a specific reading grade level are translated into Spanish, the reading grade level may change. Also, recall that translating word-for-word from English into another language is seldom productive because of cultural differences and literacy limitations. The first step, then, in keeping materials readable is to know your audience.

Know Your Audience.

To gauge the appropriate reading level, you have to know your target audience. Your agency can determine the reading level, cultural differences and preferred language of your target audience. These factors will influence the text and format of what you write. Are they migrant farm workers, construction workers, pregnant women, college students?

Some techniques that can help you get a profile of your audience are:

- ▶ Use a focus group to learn characteristics like age, cultural diversity and preferred language.
- ▶ Use census data of neighborhoods where clients live for demographic, social and economic characteristics.
- ▶ Research with questionnaires or sample groups.
- ▶ Pull a sample of charts or medical records. Review the school grade completed.

Develop materials that are culturally appropriate.

Ethnic and cultural differences may require using a different format, additional examples, use of familiar language, definitions of terms or possibly adding a glossary. For example, a glossary could show different translations of a specific term. Start with the actual word used in the text. Present that word in the glossary with alternatives as they would appear in a similar language or dialect.

Other tips:

- ▶ “Obtain advice from members of the culture during planning or development.
- ▶ Produce materials in the languages of your target population.
- ▶ Use practitioner panels from the culture to develop health materials.” (Doak, Doak and Root, 1996)
- ▶ Assess the suitability of draft and finished material using a checklist (*Appendix F*).

☑ Design for Readability

Simple organization of text, effective format and design can increase comprehension and reduce reading grade level, regardless of any readability test results. Here are some suggestions for ensuring readability.

- ▶ Whether you're developing or translating material, have several (at least three) members from the culture work with you in the overall design and approach.
- ▶ Use a checklist of attributes that define easy-to-read materials.
- ▶ Use patients to test suitability of materials.

☑ Use a trained bilingual material specialist.

Seek a trained professional who is sensitive to the readability criteria being sought, such as: how well the text is organized; type of visual aids in text; whether the text is tapping into the knowledge base of the audience.

☑ Work with a readability formula.

When working with Spanish-language materials, there are mixed views on the use of readability formulas, mainly since none is suitable for Spanish. One view is to try to keep the use of a readability formula out of the writing process itself. Instead, use the formula early in your writing as a source of feedback to see if the reading level is on track. Another is to use a readability formula as a screening tool for English materials. The steps would be to “write – test with a readability formula for English materials – rewrite – test again – translate (but not word for word) – field test with the audience – rewrite.”

Another view is to “do a readability test on existing English version and trust that the readability results carry over into Spanish” (1996 telephone conversation by Vicki Hill with the editor S.J. Samuels, *Readability: Its Past, Present and Future*). A good translator will be sensitive to the readability of the target audience.

☑ Field test new and existing materials with your target audience before final production.

No readability formula takes the place of field testing with the audience. Depend on the field test to find out if any parts are not clear, and to improve vocabulary choices, readability and cultural appropriateness. Field testing materials also helps determine if clients can read or follow the directions.

APPENDIX F

Sample Checklist for Developing Easy-to-Read Print Materials

This **sample** checklist can be adapted to your needs, such as developing one with criteria that can be used at the writing or reviewing stage, or both. The bilingual material specialist can use it as a guide when working with the graphic artist. **Feel free to copy this checklist.**

Directions: Place a check next to each item that meets the described attribute.

Title of material _____

Target audience _____ **Estimated reading level** _____

- Content and Style**
- The material is interactive and allows for audience involvement.
 - The material presents “how-to” or “need to know” information rather than “nice to know” information. Desired behavior changes are stressed and clearly stated.
 - Not more than three or four main points/concepts are presented.
 - Peer language is used whenever appropriate to increase personal identification and improve readability.
 - A summary that stresses what to do is included.
 - The writing is in conversational style, active voice. Tone is friendly.
 - There is little or no technical jargon.
 - Words are familiar to the reader. Any new words are defined clearly.
 - Sentences are simple, specific, direct and written in the active voice.
 - Each idea is clear and logically sequenced (according to audience logic).
 - The material uses concrete examples rather than abstract concepts.
 - The text highlights and summarizes important points.
 - Material is current and scientifically accurate; based on current agency recommendations.
- Layout**
- The cover is attractive. It indicates the core content and intended audience.
 - The material uses headers to help the reader organize material.
 - Headers are simple and close to text; show organization and provide message repetition.
 - Layout balances white space with words and illustrations (50:50); appears uncluttered.
 - Text uses upper and lower case letters.
 - Type size and style of print are easy-to-read; type is at least 12 point. No fancy type.
 - Layout attracts attention.

- For emphasis, **boldface** type is used rather than underlining, *italics* or ALL CAPS, which are harder to read.
 - Text moves horizontally more than vertically.
 - Each list contains 5 items or less.
 - Contrast between paper and ink color is evident.
- Visuals**
- Visuals reinforce the text (are not decorative), are meaningful to the audience and are located close to the text.
 - Visuals are shown in context (e.g., a picture of the entire upper body vs. an arm or a hand).
 - Visuals have captions. Each visual illustrates and is directly related to one message.
 - Visuals use adult rather than childlike images. No cartoons.
 - Visuals show positive rather than negative examples.
 - Visuals are accurate (e.g., dentist with gloves and face mask).
 - Illustrations show familiar images that reflect cultural context.
 - Illustrations and photos are of high quality, i.e., use simple photos or line drawings without background clutter or distraction.
 - Different styles, such as photographs without background detail, shaded line drawings or simple line drawings, are tested with the audience to determine which is understood best.
 - Cues, such as circles or arrows, point out key information.
 - Colors used are appealing to the audience (as determined by testing).
- Readability**
- Research on the audience’s education and literacy levels has been used in materials development.
 - Materials have been field tested for readability with the audience.
- Compliance with State Policy**
- Source of this material is provided along with appropriate logos.
 - Cost statement appears, if necessary.
 - Material has been screened for appropriate use of any policy statements.
 - Material has been copyedited using a state-approved style manual, if appropriate.
 - Material indicates title, topic, target audience and source in English somewhere on the document.
- Appeal and Cultural Appropriateness**
- The material is culturally, gender and age appropriate.
 - The material closely matches the logic, language and experience of the intended audience.
 - Interaction is invited via questions, responses, suggested action.
 - Language and graphics are acceptable to audience and not offensive; avoid negative stereotyping; and are presented in an unbiased way.

Source: Adapted by the N.C. Department of Health and Human Services, Public Health Communication office mainly based on materials from the Allied Health Education Center in Biddeford, Maine.

APPENDIX G

References

The recommendations in this document are based on experience and currently available reading education, health education and medical research, including, but not limited to, the following references:

Bilingual Materials Catalog. N.C. Bilingual Resource Group. 1996. N.C. Department of Health and Human Services. Division of Community Health.

Clear & Simple -- Developing Effective Print Materials for Low-Literate Readers. 1994. National Cancer Institute. Free. 1-800-4-CANCER.

“Look Here First... Guidelines on Developing and Writing Easy-to-Read Consent Forms for Public Health Programs.” 1995. N.C. Department of Health and Human Services. Office of Local Health Services. (*Note: This publication no longer in print. Please see instead, Public Health Forms Manual*. 2000. N.C. Division of Public Health Forms Committee. Available on the web at <http://www.dhhs.state.nc.us/dph/formsmanuals.htm>)

Making Health Communications Work – A Planner’s Guide. 1989. National Cancer Institute. Free. 1-800-4-CANCER.

Readability: Its Past, Present and Future. Zakaluk, B.L. and Samuels, S.J., editors. 1988. International Reading Association.

“Review Checklist for Written Health Education Materials Designed for Persons with Literacy Skills Between 5th-8th Grade.” 1995. N.C. Department of Health and Human Services, Division of Community Health.

Teaching Patients with Low Literacy Skills. Doak, C.C., Doak, L.G., Root, J.H. 2nd edition. 1996. J.B. Lippincott Co.: Philadelphia.

North Carolina Resources

LOCATING BILINGUAL MATERIALS

Bilingual Materials Database in NC DHHS

This database lists bilingual health and social service materials and forms used in North Carolina public service agencies. The majority of entries are for Spanish materials, but listings in other languages are included. Abstracts of materials with information on ordering can be provided. The office does not provide copies of the materials and no catalogue is available. These materials have not been reviewed for accuracy. Agencies should follow the guidelines provided in section 3 of this document before providing any materials to clients. Requests for a specific topic and for a specific language can be faxed to Suzanna Young, Refugee Health Program, at (919) 715-3144 or by e-mail to suzanna.young@ncmail.net.

Farmworker Health Resource Library at N.C. Primary Health Care Association

This library and database contains printed materials and videos related to farmworker health issues. Many of the materials are available in Spanish. This library is a resource for agencies providing health services to migrant and seasonal farmworkers. Some materials are available in bulk, others are listed in the database with information on ordering, and videos may be checked out. Call (919) 469-5701 for more information.

North Carolina AHEC Latino Health Information and Latino Cultural Resources Website

Resources for Hispanic health and cultural information and for Spanish language training and interpreter training is available on this website: <http://www.hhcc.arealahec.dst.nc.us>.

TECHNICAL ASSISTANCE FOR DEVELOPING, TRANSLATING OR REVIEWING BILINGUAL MATERIALS

Office of Citizen Services, NC DHHS

The Hispanic Ombudsman in the Office of Citizen Services can direct you to appropriate members of the NC Bilingual Resource Group for consultation about issues related to developing, translating or reviewing bilingual materials. Call the CARE-LINE Information and Referral Service at 1-800-662-7030 (English/Spanish), or 733-4261 in the Triangle area (TTY: 1-877-452-2514, or 733-4851 in the Triangle area). The service is available 8 a.m. to 5 p.m. Monday through Friday, except holidays.

LOCATING TRANSLATORS

CARE-LINE's Hispanic Ombudsman (1-800-662-7030 or 919-733-4261; TTY 1-877-452-2514 or 919-733-4851) can provide information on translators belonging to the Carolina Association of Translators and Interpreters (CATI) or other experienced translators in your area. If you wish to obtain a Directory of Translators/Interpreters for your agency, you may contact:

Carolina Association of Translators and Interpreters (CATI) This is a professional association of translators and interpreters for North and South Carolina. Call (919) 577-0840 or e-mail C.A.T.I.@pobox.com for more information.

The American Translators' Association is a national organization providing accreditation to translators. ATA's number is (703) 683-6100.

APPENDIX H

EVALUATING TRANSLATORS' QUALIFICATIONS

Because it can be difficult for agencies to evaluate someone's Spanish-language skills, an application and interview form (*Appendix C*) were developed by the Interpreter Task Force. For assistance in reviewing applications, contact CARE-LINE's Hispanic Ombudsman (see above) to provide information on individuals in your area with the credentials and Spanish skills necessary to help you. Other resources to assist in reviewing applications might be the faculty in your local high school, community college, college or university.

RESOURCES FOR INTERPRETERS

- The N.C. Migrant Health Program provides access to a toll-free medical interpreter service for public and private providers of health care services to migrant farmworkers and their families in the state. Call 1-800-255-8755 Monday through Friday, 8:30 a.m. to 4:30 p.m.
- The N.C. Refugee Health Program provides health departments access to the AT&T Language Line for services to newly arrived refugees. For more information, call Suzanna Young at (919) 715-3119.

National Bilingual Materials Resources

Following is a limited list of possible resources for health-related bilingual materials for patient education. There may be a charge for some of the resources listed. Catalogues of materials can be requested by calling the numbers provided. Agencies should not assume that bilingual materials they order contain current information or are accurately translated. Agencies should follow the reviewing guidelines provided in Section 3 of this document before providing any materials to clients.

- Multilingual Health Education Resource Guide, Center for Applied Linguistics, (202) 362-0700 (www.cal.org)
- National Center for Farmworker Health, Inc. (512) 312-2700 (www.ncfh.org)
- Novela Health Education tools, Radio KDNA, (509) 854-1900 (Select Novelas or Multimedia at www.homestead.com/radiokdna/files/index.htm)
- Resources for Cross-Cultural Health Care, (301) 588-6051 (www.diversityrx.org)
- Texas Department of Health, (512) 458-7111 (www.tdh.state.tx.us)
- National Maternal and Child Health Clearinghouse, (888) 434-4MCH (434-4624) (www.nmchc.org)
- Education Resources for Health Promotion, Krames Communications, (800) 333-3032 (www.staywell.com)
- Utah Department of Health, Office of Ethnic Health (801) 538-6360 (http://hlunix.hl.state.ut.us/ethnic/html/pamphlet_list.html)
- U.S. Office of Minority Health Resource Center, (800) 444-6472 (www.omhrc.gov)
- Farmworker Nutrition Education Resource Guide, U.S. DHHS, (703) 528-4141 (www.hhs.gov)
- National Cancer Institute, 800-4CANCER (www.nci.nih.gov)
- Channing L. Bete, Inc. Health Education Materials, (800) 628-7733 (www.channing-bete.com/CLB)

ADDITIONAL WEBSITES

- University of Washington "EthnoMed": healthlinks.washington.edu/clinical/ethnomed
- State University of New York "CulturedMed": www.sunyit.edu/library/html/culturedmed
- Queensland Health (Australia): www.health.qld.gov.au/hssb/cultdiv/home.htm
- Migrant Clinicians Network: www.migrantclinician.org

THE N.C. BILINGUAL RESOURCE GROUP

Helping public service agencies overcome language barriers

In November 1995, representatives from 27 state-level public service agencies came together to establish the NC Bilingual Resource Group. Recognizing the needs of public service agencies serving the fast-growing Spanish-speaking population in the state, the group serves as a resource, helping agencies develop the capacity to provide quality services to clients lacking fluency in English. Agencies interested in becoming a part of the Bilingual Resource Group may contact Katie Pomerans at (919) 515-9151 or katie.pomerans@ncsu.edu. Below is a description of some of the resources available to public service agencies. More detailed information on these and other resources are in Appendices A-H of this document.

Interpreter and Provider Training The Spanish Language and Cultural Training Initiative is supported by the Duke Endowment and coordinated by NC AHEC. Additional information is available at the NC AHEC website, www.hhcc.arealahec.dst.nc.us. The Initiative includes:

- **Interpreter Training:** Training for interpreters working in health care and social service agencies is offered three times a year at various locations around the state. Participants should have demonstrated competency in English and Spanish. The Level I training is a two-day introductory training course for community interpreters. Topics covered in Level I include the role of the interpreter, different modes of interpreting, interpreter ethics, specialized vocabulary, and community resources. Level II, a one-day training, provides additional intensive training and practice sessions. The training is offered at a modest cost to participants. For information on future trainings, see the AHEC website or contact the Interpreter Training Coordinator at the N.C. Office of Minority Health, (919) 715-0992.
- **Provider Training:** A one- or two-hour curriculum is available for health and human service providers that prepares them for working effectively with interpreters. For more information, see the AHEC website or contact the Interpreter Training Coordinator at the N.C. Office of Minority Health, (919) 715-0992.
- **Spanish Language Training for Professionals:** Four levels of Spanish-language training are provided in a variety of formats to assist health professionals in communicating with Spanish-speaking clients. This component of the Initiative is coordinated by the University of North Carolina School of Public Health in Chapel Hill. For information, see the AHEC website or call (919) 966-7381.
- **Website:** Information on Hispanic/Latino health resources and the interpreter and Spanish-language trainings is on the AHEC Latino Resource Center website, www.hhcc.arealahec.dst.nc.us.

Bilingual Materials A bibliography database of bilingual health and social service materials and agency forms has been established by the Bilingual Resource Group. See *Appendix H*.

Consultation on Bilingual Issues Technical consultation is available by phone from members of the Bilingual Resource Group. Consultation on topics related to serving non-English-speaking clients includes interpreter hiring and training, identifying quality Spanish-language materials, and cultural diversity training. For referrals to consultants, call the CARE-LINE Information and Referral Service at 1-800-662-7030. In the Triangle area call 733-4261. (TTY: 1-877-452-2514, or 733-4851 in the Triangle.)

Developing and Translating Materials The Bilingual Resource Group created the booklet *Developing, Translating and Reviewing Spanish Materials* – first in print and now on the web (<http://www.dhhs.state.nc.us/dph/formsmanuals.htm>) – to provide agencies with general guidance on bilingual materials.

THE N.C. BILINGUAL RESOURCE GROUP

AGENCY MEMBERS

Bilingual Communications, Inc.
Carolinas Association of Translators & Interpreters (CATI)
Choice Translating & Interpreting LLC
Diocese of Raleigh Catholic Social Services
Duke University Medical Center
Governor's Advisory Council on Hispanic/Latino Affairs
Interact
National Health Law Program
N.C. Area Health Education Centers (AHEC)
N.C. Association of Local Health Directors
N.C. Association of Public Health Nurse Administrators
N.C. Community College System
N.C. Cooperative Extension Service, NCSU
N.C. Department of Correction
N.C. Department of Health and Human Services
Division of Child Development
Division of Medical Assistance
Division of Mental Health
Division of Public Health
Division of Services for the Blind
Division of Social Services
Office of Citizen Services
Office of Minority Health
Office of Public Affairs
Office of Research, Demonstrations and Rural Health
N.C. Department of Labor - Division of Agricultural Safety & Health
N.C. Department of Public Instruction
N.C. Healthy Start Foundation - First Step Campaign
N.C. Primary Health Care Association
North Carolina State University School of Veterinary Medicine/Public Health Epidemiology
Orange County Parent Education Initiative
The Telamon Corporation
University of North Carolina at Greensboro
University of North Carolina - Department of Health Policy and Administration
Wake Area Health Education Center (AHEC)
Wake County Human Services