<center>**Designing Forms**</center>

Content

!   Determine what the form is intended to do.

Try to keep the form to one purpose, whether it is logging check requests or keeping track of art show space assignments. Don't try to have the form do too much. For example, a form that tracks volunteer assignments to a department is fine, but if it also tries to track their hotel reservations, whether and when they receive and return their beepers, etc., it is being handled by too many people and will not be in one place for reference.

!   Consider how you will be logging the information received from the form.

For example, asking "What office supplies will you need?" and leaving several blank lines will result in idiosyncratic entries that will have to be entered individually. Providing a check-off list ending with two or three "Other" boxes enables you to add up common entries quickly.

!   Provide enough information in the question to make the answers useful without requiring a follow-up discussion.

For example, asking "What furniture will you need for your office?" and providing several blank lines may result in requests for furniture that is not available or is not part of a standard package provided by the hotel or convention center. This will likely result in the need for a follow-up conversation with the respondent. Providing a list of the standard furniture available and the cost for known exceptions enables the respondent to make an informed response.

!   Make the questions as specific as possible to ensure uniform responses.

For example, asking "How many hours of volunteer help will you need pre-con?" and then listing the days before the convention could be interpreted several different ways: cumulatively, by shift, by person, etc. Explaining the assumptions on which the volunteer hours are being compiled and providing an example will help you get compatible results.

!   State your questions as clearly as possible.

Note any unusual abbreviations. Explain what you mean by commonly found words like "standard" or "usual." For example, saying "Standard ribbons will be ordered by Division Heads so if you're below that level, don't worry about them" will likely result in requests for an explanation of what the standard ribbons are.

!   Consider the conditions under which the form will be used.

For example, a sheet of paper filled with lines to be entered for a phone log will likely be lost or misplaced on the desk featuring the phone. A pad of standard phone message pads is more likely to be found on the desk and used.

!   Help the environment -- save some trees!

Make sure you really need the information you're asking for in written format. Is a form asking for job descriptions necessary, or can each division head write job descriptions for the division in an idiosyncratic way for internal division use? Is a photocopy log necessary if the money for paper for the office is coming out of a common fund?

!   Only Ghu Is Omniscient!

Try showing the form to people inside the relevant area to make sure you've covered all the information necessary. Show the form to people outside the area and have them attempt to fill it out to pinpoint confusing questions or ill-designed response space. Get feedback on supply lists, furniture lists, and so on to make sure you include all the possibilities.

Physical Design

!   Use a typewriter or printer for all form layouts; your mother may be able to read your handwriting but not everyone else can.

!   The purpose of a form is to gather information, not to show off desktop-publishing skills. One or two typefaces are sufficient. Also, don't overuse bold or italic — they're meant for emphasis so using them everywhere dilutes the intended effect.

!   Keep margins for stationery as standard as possible. Outlines around the page or large logos down the left side may look artistic but you'll regret them when writing long letters or trying to print on a standard printer.

!   Consider possible photocopying problems when deciding on paper color, background illustrations, and so on.

!   Leave enough space for the longest possible entry to be made on a line.

!   Reference information should be on the first or front page; for example, the department for which the form is intended, and the person filling out the form (when relevant).

!   If you notice you are repeating information (days of the week, categories of responses) in several areas of the form, it can probably be designed more efficiently. Look for a way to combine the repeated information in a grid or table.