



BETTER FORMS FOR A BETTER DEMOCRACY

Designing Government Forms
That Work for the Public



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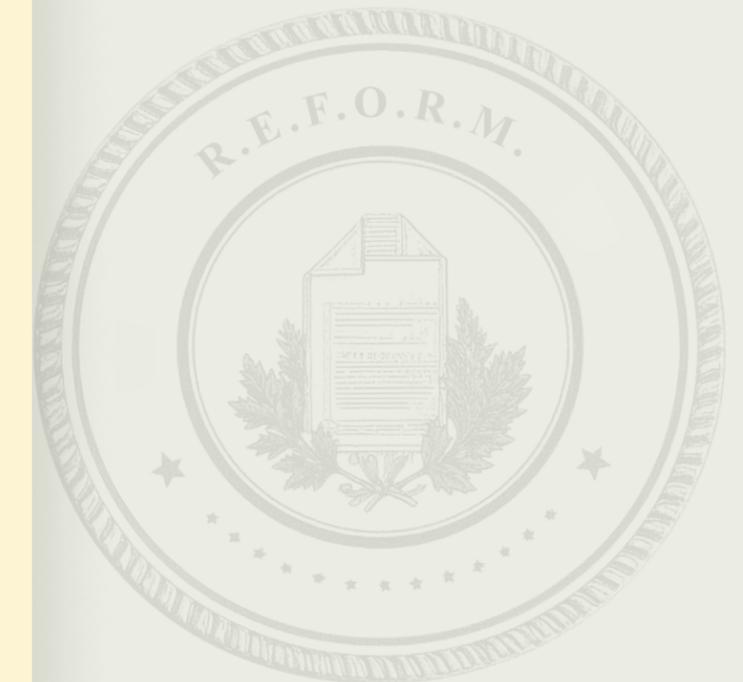
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Series to Update Essential R.E.Q.U.E.S.T.)

Review, and Management (R.E.F.O.R.M.)





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Requisition of External Queries to Update Essential Standardized Templates (R.E.Q.U.E.S.T.)

Issued by the Regulatory Entity for Form Oversight, Review, and Management (R.E.F.O.R.M.)





REQUISITION OF EXTERNAL QUERIES TO UPDATE ESSENTIAL STANDARDIZED TEMPLATES (R.E.Q.U.E.S.T.)

PLEASE READ ALL INSTRUCTIONS CAREFULLY BEFORE COMPLETING THIS FORM. Please print legibly using a **0.75 mm blue ballpoint pen** only. If you make any errors, please start over using a new form. All questions are required and **must be completed in one sitting** unless otherwise indicated by a prior exemption. Submit the ORIGINAL and NOTARIZED copy to R.E.F.O.R.M. Please note that an **administrative filing fee of \$50** will be due upon submission; only personal checks will be accepted. If you do not completely fill out this form or fail to submit the required documentation, your request may face significant processing delays, and/or the denial of your request, and/or other consequences not specified here. If you have any questions or issues, please submit a **handwritten letter** with your ID number to our customer service department, which will review your request. A representative may get back to you **within the calendar year**.

1a. Given Name:	1b. M.I.:	1c. Family Name:
2a. Current Mailing Address:	2b. Alternate Mailing Address:	
3. Social Security Number:	4. Bank Account Number (please print clearly):	

5a. Title of Form:	5b. Issuing Agency:
5c. Rationale for Form Improvement Request (additional documentation required below):	

6. Proposed Recommendations for Form Optimization and Efficacy (minimum of **five** recommendations):

I. _____

II. _____

III. _____

IV. _____

V. _____

Additional recommendations are not required, but highly recommended. Please append Part II. Additional Recommendations.

7a. Nature of Previous Interaction with Form (make **only** the applicable selections):

Self-completion of Form

Completion of Form on behalf of another individual

Utilization of information obtained from Form

Creation, development, and management of Form

No previous interaction with Form

7b. Date of Most Recent Interaction with Form:

MM / DD / YYYY

Additional evidence is required to validate your responses above, else they will be considered unsubstantiated and rendered void. Please submit the following documents with your request:

- Five (5) photocopies of the Form
- A copy of your Employee ID
- Signed supporting statement from Board-approved Official Representative of Entity (BORE)

I hereby attest, under penalty of perjury, that the above information is true to the best of my recollection. I acknowledge that my responses may be shared publicly and that I am transferring exclusive, perpetual rights to this data to R.E.F.O.R.M., waiving any and all claims I may have now or in the future.

Signature X _____ Date _____

DO NOT WRITE BELOW THIS LINE. FOR USE BY AUTHORIZED PERSONNEL ONLY.

___ approved ___ denied ___ archived ___ forwarded ___ discarded ___ composted

NOTE: **This version of the form is out-of-date and no longer accepted for submission.** Please see the next page for the latest instructions.

How could this form be improved?

Turn the page to see our tips.

TER FORMS A BETTER IOCRACY

os for Designing Forms

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what's next.

pports Completion

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what matters.

Ensures Engagement

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and/or other consequences not specified here. If you have any questions
to our customer service department, which will review your request. A r

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have now or in the future.

Signature X

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2 Explain what's next.

Let people know what happens next, how they'll hear back, and how long it might take. This helps demystify processes that can feel intimidating.

5 Offer human help.

Even the most well-written form can't address everyone's needs. Sometimes, it's more helpful to talk to a real person. This can go a long way in getting people the support they need.

4 Ask only what matters.

Make sure every question is absolutely necessary. Requiring the minimum makes the form more efficient and respectful to people's time.

3 Ease the ask.

Keep questions simple, and start with easier ones. This builds confidence for people who are unfamiliar with jargon or are hesitant to share.

6 Consider diverse humans.

Use plain language, large text, and space for longer answers. This ensures people with different abilities and backgrounds can participate.

1 Explain why you're asking.

Explain why you are asking, how the information is used, and how answering benefits people. This transparency builds trust and motivates people to answer more openly.

Want to fill out a better version of this form?

Head over to bit.ly/468dZwj and tell us about a government form you'd like to see improved.

BETTER FORMS FOR A BETTER DEMOCRACY

Six Tips for Designing Forms

If your agency delivers public services, chances are there's a form involved. Government forms aren't neutral: They establish the boundaries of an agency's relationship with the public, reveal the good and bad of operational workflows, and help (or hinder) the delivery of public value. Every question, instruction, and interaction is an opportunity to design a more meaningful engagement between a real person and your staff, between a resident in our democracy and the state they empower.

At the Public Policy Lab (PPL), we spend a lot of time thinking about how forms and notices work, and how to make them better. Whether we're improving access to the Michigan civil court system, redesigning benefits notices for Arizona's Department of Economic Security (DES), creating user-friendly templates of public housing forms with the U.S. Department of Housing and Urban Development (HUD), or improving subsidized housing applications with the Department of Housing Preservation & Development (HPD), there's one consistent theme we see: better forms make a better democracy.

Below, we offer six tips for designing better forms that build trust, support completion, and make public services more accessible.

Transparency Builds Trust

- 1 Explain why you're asking.
2 Explain what's next.

Simplicity Supports Completion

- 3 Ease the ask.
4 Ask only what matters.

Accessibility Ensures Engagement

- 5 Offer human help.
6 Consider diverse humans.

TRANSPARENCY BUILDS TRUST

1 Explain why you're asking.

Explain why you are asking, how the information is used, and how answering benefits people. This transparency builds trust and motivates people to answer more openly.

If it isn't clear to people why they are being asked a question, they're more likely to hide information, give incomplete answers, or skip the question entirely. This slows down processing times and makes it harder for staff to understand how to help.

We recently redesigned a subsidized housing application that asked if anyone in the applicant's household was pregnant. Families with a baby on the way may qualify for a larger apartment, but that wasn't explained anywhere in the application. Without that context, the question felt invasive, and applicants worried answering it might work against them. Adding the sentence, "We ask this to determine if your household may qualify for a larger apartment," eased people's fears.

How you can explain why:

- Review common submission errors for your forms to find the questions that might be challenging to applicants.
- Add short explanations to sensitive questions so that people know how their information will be used and how answering helps them.
- Have people outside of your agency review your forms and note the questions that could use some added context.

2 Explain what's next.

Let people know what happens next, how they'll hear back, and how long it might take. This helps demystify processes that can feel intimidating.

Submitting a form — especially a digital one — can feel like sending information into the void. Applicants usually have no visibility into who will see their data, what will happen next, and when (or if) a response will come. People are left feeling uncertain about a process that directly affects their lives. In our research, we see how even a little transparency goes a long way. You don't need to offer a breakdown of your entire process; you can simply give people a sense of what's next.

When redesigning the subsidized housing application, we decided to add a cover sheet to the application package. This sheet outlined what applicants could expect before they even got into the forms. It included guidance on what to know before they begin and what happens after they submit — including information on the waitlist, housing-inspection, and lease-signing processes. This overview helped people see the journey from completing the application to moving into a new home.

How you can explain what's next:

- Right after a form is submitted, send applicants a message confirming that their application materials have been received. Include a copy of their answers.
- Provide a brief note on what will happen next, including who will review the application, average processing time for review, and a general timeline of next steps.
- Let applicants know how they will hear back and how they can follow up if they need to check their application status.

SIMPLICITY SUPPORTS COMPLETION

3 Ease the ask.

Keep questions simple, and start with easier ones. This builds confidence for people who are unfamiliar with jargon or are hesitant to share.

First impressions matter. When a form opens with complicated questions, it sends the message that the whole process is going to be difficult. For a lot of people — especially those with busy schedules, language barriers, or limited access to technology — tricky questions can feel like an invitation to give up.

Make things easier by using plain, everyday language. Your audience won't be familiar with the same jargon and acronyms that you are. Consider a question like, "Please indicate whether any individuals currently residing in your household, including but not limited to immediate family members and roommates, are currently enrolled in any other form of federally subsidized housing assistance." You might be able to figure out what this is asking, but now compare it to: "Does anyone in your household currently receive housing assistance?" The second question is much easier to understand — and easier to answer.

There are times — for legal or policy reasons, for example — when you might have to use more difficult language. In that case, one strategy is

to ask easier questions first, to help people succeed at the form before getting into trickier territory. You can also add an explanation after to help decode any technical language. In other cases, the only way to fix a form may be to change a regulatory requirement. At one time, a VA benefits form asked veterans to describe traumatic events, specifically times when they had seen squadmates injured or killed. No amount of design or plain language could improve that request and, eventually, the VA decided to decommission the form.

How you can ease the ask:

- Remove jargon or technical language and aim for a ninth-grade reading level or lower. Consult a free online readability checker to help you assess.
- Avoid asking multiple things in the same question. Only introduce one idea per question.
- Ask easier questions first to build confidence and comprehension. Use multiple-choice questions where they apply.

4 Ask only what matters.

Make sure every question is absolutely necessary. Requiring the minimum makes the form more efficient and respectful to people's time.

Working through a long form creates a growing burden with each additional question. This burden is not just in time: there is also an emotional, physical, and cognitive burden to answering an endless list of questions. This “bio-cost” can discourage people before they’ve even begun — leading them to rush, skip over important information, or abandon the form altogether.

A simple but powerful principle is to ask for only what you truly need to know. We recently helped an agency achieve this by going line-by-line through dozens of application forms to remove any questions that were inessential or duplicative. For example, one question asked about owing money to housing agencies. It was a fair question, but staff would have to check their database anyway to see if the information was true, so there wasn’t really any need to ask in the first place. Going through this process with the staff who use the form helped us find redundancies like this and make sure every question had a true purpose.

How you can only ask what matters:

- Work with agency staff who use the information collected by a form to understand each question’s intent and whether it is necessary.
- Map each question to its purpose and remove anything that doesn’t have a specific and necessary goal.
- Identify duplicative questions and condense questions where possible.

ACCESSIBILITY BROADENS ENGAGEMENT

5 Offer human help.

Even the most well-written form can’t address everyone’s needs. Sometimes, it’s more helpful to talk to a real person. This can go a long way in getting people the support they need.

Even the most well-written, thoughtfully-designed form cannot address every possible point of confusion that may arise, and this is okay! Those moments aren’t a failure of your form — they are a normal part of delivering a complex service. What causes frustration is when someone can’t figure out how to get help or what to do next.

Offering the support of a real person allows for targeted troubleshooting and signals that your agency cares. Every question doesn’t have to go straight to a staff member: FAQs and even chatbots can be helpful for solving common problems. But when these initial strategies aren’t sufficient to solve people’s issues, make sure it’s clear how they can connect to a person for help.

How you can offer human help:

- Include a “need help?” section directly on the form, ideally with multiple contact options (phone, email, chat, etc.).
- Make sure contact information is clearly visible, not buried in footnotes or in a separate location from the form pages.
- Ask real applicants what would make them feel supported and incorporate those insights into training materials for support staff.

6 Consider diverse humans.

Use plain language, large text, and space for longer answers. This ensures people with different abilities and backgrounds can participate.

Forms are often written and designed for the “average” person, but in practice, the people who fill out your form will have varied language capabilities, literacy levels, vision, cognitive ability, and motor skills. All of these qualities affect people’s ability to complete the form.

A good form will anticipate and account for human differences. Know your audience and design for their needs. If your forms are primarily

used by older adults, you may want extra large text with high-contrast colors to make things more visible. Translate your form into your community’s languages (New York City translates into 10!) and leave plenty of space for answers for people with limited mobility (or just larger handwriting). These accessibility choices help people feel confident and supported and also lead to more accurate responses.

In one form design project, we used our research with applicants to create a set of cards outlining eight different types of users that interact with housing agencies. These cards weren’t meant to be a substitute for testing forms directly with people, but they helped us and agency staff keep diverse audiences and their needs in mind.

How you can consider diverse humans:

- Use sufficiently large font sizes with strong color contrast between the text and background. Consult free online color contrast checkers to ensure your colors and font sizes are visible enough.
- Offer forms in the languages spoken by your audience and ensure translations are professionally reviewed and culturally relevant.
- Test your forms with real people to see what needs improvement across different needs and abilities.

FORMS REFLECT VALUES

Forms may seem like a small part of the service you provide, but they mediate a crucial interaction between your agency and the public. They tangibly represent your agency’s values. At their worst, they can diminish trust and dissuade people from accessing services. At their best, they can build trust in our democracy — demonstrating to people that their government respects their time, information, and needs.

FOR FURTHER READING

Want to learn more about form design? Here are a few resources you can explore next — they’ve been essential reading for us!

- *Field Guides to Ensuring Voter Intent*, Center for Civic Design
- *Forms for People: Designing Forms That People Can Use*, Robert Barnett
- *Forms That Work: Designing Web Forms for Usability*, Caroline Jarrett and Gerry Gaffney
- *Content Design (Second Edition)*, Sarah Winters and Rachel Edwards

This zine has been typeset in Public Sans (United States Web Design System), Sharp Grotesk (Sharp Type), and Value Serif (Colophon Foundry).

PPL Ministry of Zines

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PUBLIC POLICY LAB

Our team designs policy and services that help the American public build better lives.

The Public Policy Lab (PPL) is a nonprofit innovation lab that works in partnership with government agencies, providers of public services, and members of the public.

PPL has more than a decade of experience applying human-centered research, design, and evaluation methods to the challenges faced by low-income and at-risk Americans.

Case studies for past PPL projects with public-interest partners can be found on our website, publicpolicylab.org.