TOOLKIT for Making Written Material Clear and Effective

SECTION 3: Methods for testing written material with readers

PART 6

How to collect and use feedback from readers

Chapter 2

What's involved in doing a project to get feedback from readers?

U.S. Department of Health and Human Services
Centers for Medicare & Medicaid Services

TOOLKIT Part 6, Chapter 2

What's involved in doing a project to get feedback from readers?

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This document is the second of 19 chapters in Part 6 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers Consulting, Inc. The guidelines and other parts of the Toolkit reflect the views of the writer. CMS offers this Toolkit as practical assistance to help you make your written material clear and effective (not as requirements from CMS).

Introduction

In this chapter, we give you the big picture of what's involved in planning and conducting feedback sessions with readers and using the results.

"feedback sessions"

In this Toolkit, we use the term "feedback sessions" to mean face-to face encounters with readers to get their reactions to written material.

You can work with readers individually in these sessions, by doing interviews, or you can work with them in small groups. A group session might range in size from two to about ten people.

This chapter goes through all of the steps of planning and conducting feedback sessions. Since reader feedback sessions are usually part of a project to develop or revise written material, you can incorporate the planning steps for your feedback sessions into your planning for the project as a whole (see, for example, National Cancer Institute [NCI], 2002).

You can keep it short and simple

Choices you make at each step of planning and implementing your feedback project affect how much time, money, and staff effort will be needed. We outline a detailed list of steps in this chapter, but feedback sessions don't necessarily require a long or complex planning process.

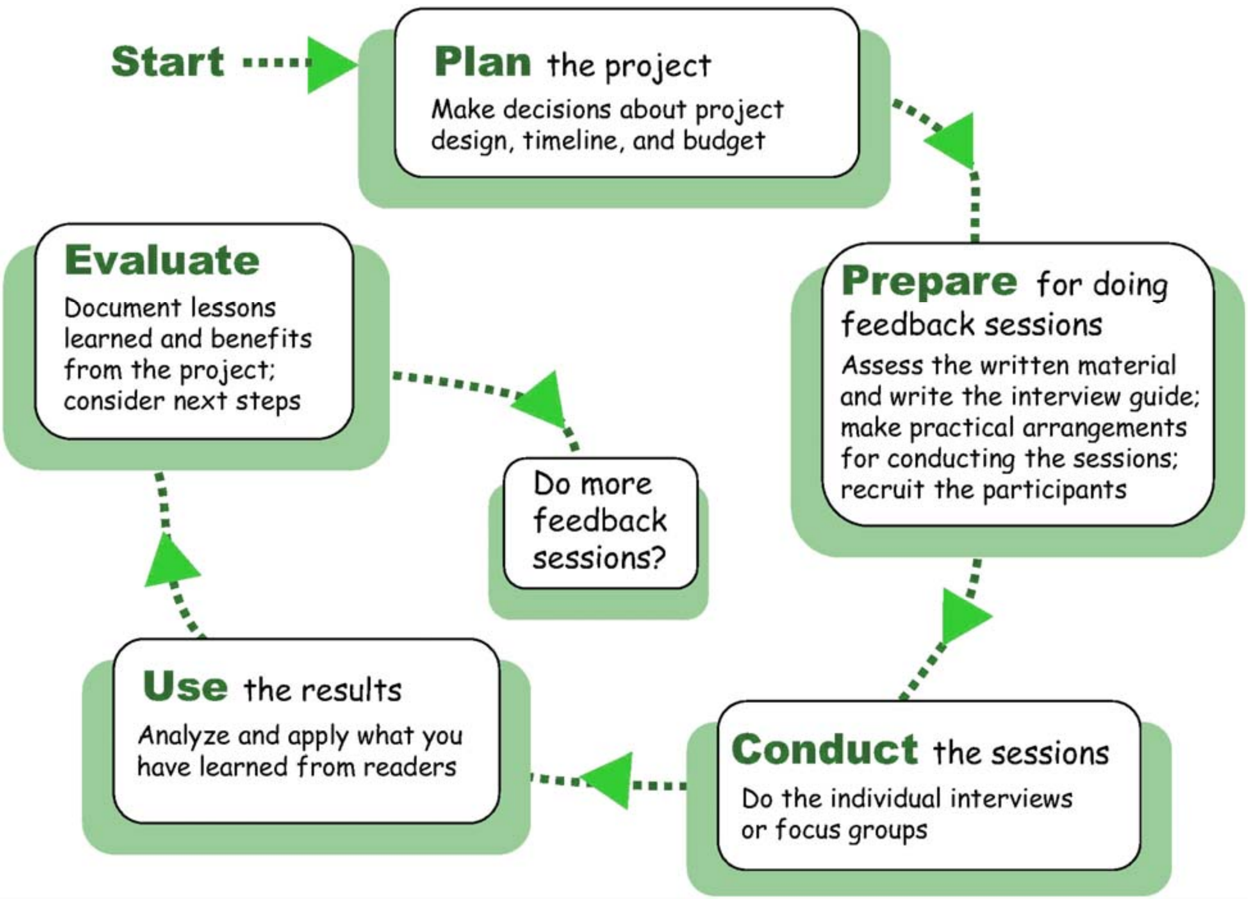
- **If doing reader feedback sessions is new to you, you will want to keep the sessions short and simple, especially at first**. You can get a lot of helpful feedback by interviewing a small number of people.

- **You don't have to spend a lot of time and resources to collect feedback**. In this chapter and other parts of the Toolkit, we include practical advice about how to plan a feedback project that is efficient and cost-effective.

Overview of steps involved in a feedback project

The diagram in Figure 6-2-a below shows the five basic steps in a reader feedback project. This diagram shows the steps of *plan - prepare - conduct - use - evaluate* as a cycle. The cycle ends with the question, "Do more feedback sessions?", because it is often helpful to get feedback from readers more than once, at different stages in your project:

Figure 6-2-a. Cycle of steps in a reader feedback project.



Source: Created for this Toolkit.

Decisions to make in planning your project

Now let's take a closer look at the tasks involved in the *plan-prepare-conduct-use-evaluate* diagram shown above. Below, in Figure 6-2-b, we show these tasks in the form of questions to guide the planning process. To help you get started on your project, this chapter has a brief discussion of each question and the decisions it involves. For many of the steps, other chapters give you the details.

The list of planning questions and decisions in Figure 6-2-b is long, but don't be discouraged when you read it. Depending on the decisions you make in planning your feedback sessions, it's possible to do the sessions quickly, simply, and at relatively low cost. To give just a few examples: instead of using expensive research facilities, you can find community settings to serve as low-cost or free sites. Instead of hiring outside experts to design and conduct the sessions, you can invest a little time and energy and learn to do it yourselves. Instead of spending time and money to recruit people in advance for focus groups, you can recruit participants on site for immediate participation in a feedback interview. This chapter explains these and other choices you can make.

Once you are familiar with the basic methods and procedures for getting feedback from readers, you will be able to plan and implement a simple feedback project in a relatively short time. As you gain experience, you'll learn first-hand how valuable it is to get feedback directly from readers. With practice, the whole process of planning and conducting feedback sessions will seem much simpler and it will go more quickly.

Figure 6-2-b. Questions to guide the planning of your reader feedback project.

What type of written material, for what audience and purpose?

- What is the nature and purpose of the written material?
- Who are the intended readers? How will they get the material and how will they use it?

What do you want to accomplish?

- Why do you want to get reactions from readers, and how will you use the feedback you get?
- What are the specific things you want to learn from readers -- that is, what are the "feedback issues" you will focus on during the sessions?

Who will do the work?

- Who is sponsoring and leading this project? Who else is participating?
- Who will be responsible for each of the various tasks?

How much and what type of testing will you do?

- To get feedback from readers, will you use individual interviews, group sessions, or both?
- How long should each interview or group session be? How many sessions do you need to do?

How will you select and recruit your participants?

- What participant characteristics are you looking for, and how will you find people who meet these requirements?
- Will you recruit people on site for immediate participation, or recruit people to participate later on at a scheduled time and place?
- Who will do the recruiting?

Where will you conduct the feedback sessions?

- What type of setting will be convenient for participants and put them at ease?
- Does the setting provide enough privacy and noise control? Is it affordable?
- If you plan to recruit participants on site for immediate participation, is the setting suitable for this purpose, and can you get permission?

How will you get the written material ready to test?

- Would it be helpful to review and improve the material before you show it to readers (for example, by using the *Toolkit Guidelines for Writing and Design* or getting comments from expert reviewers)?
- What will you show readers during the session? Will you show part or all of the material? Will you show them different versions to compare?

How will you design and conduct the sessions?

- Which methods will you use to get reactions to each feedback issue or section of the material?
- Who will write the questions you prepare in advance and create the written guide for conducting the sessions?
- Who will conduct the sessions? Who will take notes during the feedback sessions? Do you want to audio tape or video tape the sessions?

How will you use the feedback you get?

- How will you analyze the feedback you get from readers?
- How will you use the results?

What is your budget and timeline?

- What is your estimated budget? What resources are available for this project? Are there ways to cut costs without sacrificing quality?
- What is your timeline?

How will you evaluate the project and document its benefits?

- How will you keep track of the practical things you learn from doing this project so that you can apply them when you do your next project?
- How will you document the benefits of getting feedback from readers?

Source: Created for this Toolkit.

What type of written material, for what audience and purpose?

What type of written material, for what audience and purpose?

- What is the nature and purpose of the written material?
- Who are the intended readers? How will they get the material, and how will they use it?

To begin planning your feedback sessions, start by considering the material itself. The type of material you will be testing affects how you design and conduct your reader feedback sessions, and it also affects your timeline and budget. For example, it is faster and easier to plan and implement feedback sessions for a short leaflet than for a long application form.

Having a clear sense of who you are trying to reach and influence with the written material is also important for your planning:

- When you do feedback sessions, you will get the most meaningful feedback if your participants are similar to the intended readers of the material. Describing the intended readers will help you set requirements for participation in your feedback sessions and estimate how hard or easy it might be to find and recruit feedback session participants who meet these requirements.

- As you think about how readers will receive the material and what you want them to do with it, you will get ideas about topics to cover in your feedback sessions. For example, if you are considering different ways of distributing the material, you could use the feedback sessions to find out from readers what they think would work best.

What do you want to accomplish in your sessions with readers?

What do want to accomplish?

- Why do you want to get reactions from readers, and how will you use the feedback you get?
- What are the specific things you want to learn from readers (that is, what are the "feedback issues" you will focus on during the sessions)?

In this second step of planning your feedback sessions, you figure out what you want to learn from readers about the particular material you are going to test. We call these things you want to learn from readers your "feedback issues" for the material.

The Toolkit has a separate chapter on feedback issues that tells how to identify them and decide which ones are most important to cover during your sessions with readers (Toolkit Part 6, Chapter 5, *Creating a list of "feedback issues" to use in testing the material*).

Another chapter of the Toolkit offers more detailed guidance. In Toolkit Part 6, Chapter 9, *Tips for collecting particular types of feedback from readers,* we discuss ways to collect the types of feedback you are most likely to seek. These are:

- How to assess appeal, cultural suitability, and personal relevance
- How to assess ease of "navigation" (effectiveness of the layout and organization)
- How to get reactions to photos, illustrations, and other visual elements
- How to find out whether readers understand the material
- How to find out whether the content meets readers' interests and needs
- How to assess usability (Can readers actually use the material? Do they think they would?)

Who will do the work?

Who will do the work?

- Who is sponsoring and leading this project? Who else is participating?
- Who will be responsible for each of the various tasks?

Who will be involved?

When you begin to plan your sessions with readers, you'll need to decide which groups and individuals should be involved and how each will participate. This includes deciding who will lead the project and how decisions will be made.

To get the most from your sessions with readers, it's helpful to begin at an early stage to identify and involve groups that have an interest in the outcomes of your project. These groups that share your goals and support the project are your stakeholders. For example, suppose that you are with an outreach organization that is developing written material to encourage parents to get health insurance coverage for their children through the Children's Health Insurance Program. The stakeholders for your reader feedback project might include the state Medicaid agency, the WIC (Women's, Infants, Children) program, social workers, state and county health departments, school nurses, doctors, clinics and hospitals, medical associations, educators and school administrators.

Getting help from your stakeholders

Stakeholders include groups that can serve as informants by giving you information and advice about addressing ethnic, linguistic, and other cultural differences among members of your intended audience. Stakeholders can include subject matter experts. They also include people and organizations that serve as "information intermediaries" for your intended readers by sharing information or providing guidance. For example, staff at the State Health Insurance Assistance Program and at area Agencies on Aging are information intermediaries for people with Medicare. Stakeholders also include groups that can help you locate or recruit participants for the reader feedback sessions, and groups whose support and assistance you want to enlist, such as advertising agencies or local media that might be willing to donate time or materials to your cause. Of course, the intended readers themselves are always among the stakeholders, and you will be involving representatives of this group directly by seeking their feedback on the written material.

You can work with stakeholders in various ways. You can consult informally with them, individually or in groups, at different stages of your project, depending on the type of advice or assistance you need. This could include, for example, asking them to review early drafts and give suggestions for improvement. Some may participate actively throughout the project, while others may play a very limited role, such as putting you in touch with a community-based organization that will help you recruit participants.

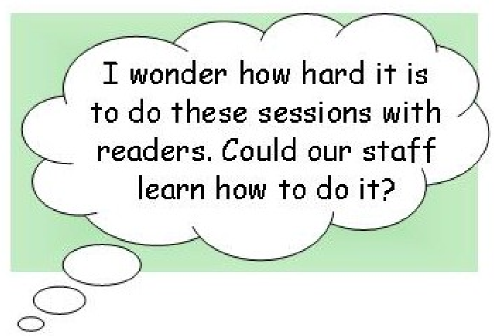
What skills are required to do the work?

Planning your project includes identifying people who are willing and able to manage the project and budget, recruit participants and make practical arrangements, design and conduct the sessions, and analyze and use the results. People on your project team might include writers, graphic designers, and people who prepare reports and presentations. Overall, these tasks require a broad range of skills, some of which are specialized.

In particular, you might wonder about the skills that are required to conduct reader feedback sessions. For those who are directly involved in interviewing readers, the most important qualities are interpersonal skills. Staff who lead a feedback session need to conduct the session in a friendly and non-defensive way that shows respect for readers, puts them at ease, and listens to them carefully.

Hire outside experts to conduct the sessions or do it yourself?

When you are deciding who will do the work, especially the work of designing and conducting the feedback sessions, you have choices. One choice is to hire experienced professionals to help you or do it for you. On the other hand, your budget may not allow for hiring outside help, or it may be hard to find consultants who are experienced in conducting reader feedback sessions. Another choice – one we encourage and support – is to learn how to do it yourselves:



It will take some time and practice to learn and refine your skills, but you will get a big payoff from this investment.

- **If your organization has never done a reader feedback project, don't be discouraged by your lack of experience**. The technical skills needed to design and conduct feedback sessions and analyze the results can be learned. Research background or similar training and experience is helpful but not necessary. Perhaps some members of your project team have done other types of interviewing that would give them a head start in learning the interviewing techniques that are used to get readers' reactions to written materials. For example, nurses and social workers receive a good deal of training in how to interview patients or clients and their family members.

- **This Toolkit teaches you the basics of designing and conducting feedback sessions**. If you have never done feedback sessions, this and the other chapters in Toolkit Part 6 will help you learn the skills you need.

- **If it's possible to get some help from experienced professionals, structure their work to emphasize coaching and training of your staff.** It will take longer for experts to add this extra task of helping your staff develop their skills, but the investment will pay off by preparing you to handle future projects more independently and at less cost. In addition, the added task of mentoring your staff keeps the outside experts in close touch with the context and details of your project, and can produce better results for you.

How much and what type of testing?

How much and what type of testing will you do?

- To get feedback from readers, will you use interviews, group sessions, or both?
- How long should each interview or focus group be? How many sessions do you need to do?

This planning question focuses on which approach you will take and how extensive your testing will be. If you work individually with readers to get their reactions, we call this type of feedback session an "interview." If you work with readers in small groups to get their feedback, we call it a "group session." A group session might range in size from a very small group of just two or three people to a "focus group" with about six to nine people.

Deciding how much and what type of testing you will do is a big topic, and we deal with it separately in Toolkit Part 6, Chapter 6, *Should you do individual interviews or focus groups?* Chapter 6 compares the strengths and limitations of each approach and discusses things to consider in deciding how many sessions to do and how long they should be.

In this Toolkit, we cover both interviews and group sessions, but our main emphasis is on interviews:

- **Interviews allow you to use the full range of feedback methods and they work better than group discussions for collecting many types of feedback**. Interviews are not as well known or widely used as focus groups. When you are collecting readers' reactions to written material, interviews offer more privacy and flexibility than group sessions and they tend to work better for many testing purposes including assessing comprehension and usability.

- **In general, it is easier to conduct individual interviews than group sessions**. Conducting a group feedback session can be challenging due to the added task of managing group interaction. If you are building your interviewing skills, it's wise to start by working individually with readers. Later, as you gain skills and confidence, you could try conducting a group session.

How will you select and recruit your participants?

How will you select and recruit your participants?

- What participant characteristics are you looking for, and how will you find people who meet these requirements?
- Will you recruit people on site for immediate participation, or recruit people to participate later on at a scheduled time and place?
- Who will do the recruiting?

Selecting and recruiting participants is another major topic. We cover this topic separately in the following series of three chapters in Toolkit Part 6:

- Chapter 14, *How will you select and recruit participants?* gives the details on how to set requirements for participation and find people who meet these requirements. To help you decide on the best approach for your project, this chapter compares two methods of recruitment. The most common approach is to recruit people in advance, setting up appointments for them to come to a particular location for a group session or individual interview. Another strategy that works well for individual interviews is to go directly to the location where you will conduct the sessions, and recruit people on the spot for immediate participation. When you do on-site recruitment for immediate participation in an interview, researchers call it "intercept" interviewing.

- Chapter 15, *Tips for recruiting people on site for immediate participation in a feedback interview*, tells you how to implement on-site recruitment. If you can find an appropriate setting for on-site recruitment, this approach can be very fast and cost-effective. It works best for individual interviews. It is generally not practical for group sessions because it's too hard to recruit a whole group for immediate participation. However, on-site recruitment can sometimes work to recruit a very small group, such as a group of two or three people.

- Chapter 16, *Tips for recruiting people by telephone to set appointments for feedback sessions*, tells you how to contact potential participants, check on whether they meet your requirements, and set appointments for individual interviews or group feedback sessions. Compared to on-site recruitment, this approach takes longer and costs more because of the time involved in identifying possible participants, contacting them, and following up with reminders.

What location will you use for the feedback sessions?

Where will you conduct the feedback sessions?

- What type of setting will be convenient for participants and put them at ease?
- Does the setting provide enough privacy and noise control? Is it affordable?
- If you plan to recruit participants on site for immediate participation, is the setting suitable for this purpose, and can you get permission?

The location you pick for your sessions with readers affects the quality of the feedback you collect and the cost of your sessions. To put your participants at ease, you need a setting that will be familiar and comfortable for them. There are other issues to consider, too, including convenience, size and flexibility of the space itself, and cost, if any, for using the setting.

To help you choose a suitable location for your interviews or focus groups, Toolkit Part 6, Chapter 13, *Choosing a location for your feedback sessions,* discusses issues to consider. It also covers practical matters such as arranging to help participants with transportation.

How will you get the material ready to test?

Planning feedback sessions #7

How will you get the written material ready to test?

- Would it be helpful to review and improve the material before you show it to readers (for example, by using the *Toolkit Guidelines for Writing and Design* or getting comments from reviewers)?
- What will you show to readers during the session? Will you show part or all of the material? Will you show them different versions to compare?

This seventh step in planning your sessions urges you to take a careful look at the material before you test it:

- **Are there any obvious problems that you should correct before you show the material to readers?** Even if you don't make any improvements before you show the material to readers, doing a careful assessment will help you identify important feedback issues to focus on during your sessions with readers.
- **Are there any places where it might be helpful to develop more than one option for revision**, and then show the different options to readers and see what they think? For example, if you think a particular page needs more visual interest, you could gather some candidate photos and show them to readers during the feedback sessions.

Here are ways to help assess and improve the material before you test it with readers:

- **Ask for "expert review."** It helps to have people who are knowledgeable about writing, graphic design, and the needs of less-skilled readers review your written material and give you their recommendations for improvement. Experts can also include people with insights into ways to make the material more culturally and linguistically appropriate for the intended readers.
- **Do a systematic assessment based on a checklist of desirable features**. For example, you could use the *"Toolkit Guidelines for Writing and Design"* as your assessment tool. These guidelines are listed in Toolkit Part 3, *Summary List of the "Toolkit Guidelines for Writing and Design"*. In all, there are 26 guidelines for writing and 46 guidelines for design.

- Toolkit Part 3, *Summary List of the "Toolkit Guidelines for Writing and Design"* includes tips for using the guidelines as an assessment tool. Using the guidelines as a checklist gives you a systematic way to spot places where you can make improvements before you show the material to readers.

- If you decide improvements are needed, other parts of the Toolkit provide detailed guidance on how to apply each guideline, using many examples. See Toolkit Part 4, *Understanding and using the "Toolkit Guidelines for Writing"* and Toolkit Part 5, *Understanding and using the "Toolkit Guidelines for Graphic Design."*

How will you design and conduct the sessions?

How will you design and conduct the sessions?

- Which methods will you use to get reactions to each feedback issue or section of the material?
- Who will write the questions you prepare in advance and create the written guide for conducting the sessions?
- Who will conduct the sessions? Who will take notes?
- Will you audiotape or videotape the sessions?
- Will there be any observers?

In this eighth step of planning, you decide which methods you will use in your sessions, and which people will take responsibility for the various tasks involved in implementing the sessions:

- **Start by learning more about what's involved in designing and conducting the sessions**. In the chapters that follow, Toolkit Part 6 gives you guidance on how to go about designing and conducting your feedback sessions. These chapters cover methods of collecting of feedback from readers and explain how to apply these methods in your own sessions. Topics include how to prepare a written guide and other materials to use in conducting the sessions. And tips on effective interviewing technique. Reading these chapters will give you a sense of what skills and level of effort are required to design and conduct your sessions.

- **Then, decide which people will do the various tasks.** Different tasks require different sets of skills and experience. Perhaps you have people on your project team who can handle all of the tasks. Or you may need to seek help on certain tasks from other individuals or organizations.

Who will conduct the interviews and who will take the notes?

During your feedback sessions, someone needs to serve as interviewer. It's also vital for someone to take notes on people's reactions to the written material you are testing. These notes are an important written record of the feedback you get. Sometimes you may choose to supplement your written notes by audio taping or videotaping your sessions, especially if you are doing focus groups rather than interviews (see Toolkit Part 6, Chapter 12, *Should you do audio or video recording of your sessions?*) But often, written notes will be your only record of the feedback you get, especially if you are doing individual interviews.

Conducting focus groups is a challenging task, and the person who does it must devote full attention to asking the questions and managing the group interaction. But if you are doing individual interviews, it's possible for one person to take the notes as well as conduct the session. The other choice is to use a two person team, where one person takes the lead on conducting the interview and the other is the primary note taker. To help you decide which way would work best in your project, Figure 6-2-c below compares these two approaches for handling the interviewing and note-taking tasks for individual interviews.

Figure 6-2-c. When you are interviewing readers, should the interviewer take the notes or should you use a two-person team?

One approach is to have the person who conducts the interview also be responsible for taking the notes. Here are advantages and disadvantages of having the same person handle both tasks:

Advantages:

- Depending on the circumstances, this approach is sometimes faster and/or more cost-effective than using two person teams.
- For some participants, being interviewed by just one person rather than a two-person team might be more comfortable.

Disadvantages:

- It can be quite challenging and tiring to take adequate notes while conducting an interview – especially if you are just learning to do feedback sessions.
- If you have to split your attention between conducting the interview and taking notes, you can't do your best at either task – even if you are experienced.
- You are on your own, with no interviewing partner to talk with about the session after it's over or work with you on summarizing highlights of the session.

Another choice is to use two-person teams:

Advantages:

- Teaming up is an excellent way to teach people how to do feedback sessions.
- It's much easier to take good notes when you have one person who is dedicated to the task of taking notes, without needing to conduct the interview as well.
- Having two people involved can enhance the quality of the feedback session itself, because one person might catch what the other misses.
- Having two people involved improves the reporting and interpretation of results from the sessions. The interviewer and note taker can talk about the session after it is finished, comparing their notes and sharing their impressions.

Disadvantages:

- Depending on the circumstances, it might take a little longer or cost a little more to use two-person teams.
- It's possible that some participants might be intimidated by a two-person team.

Source: Created for this Toolkit.

If you are doing interviews to get feedback from readers, we urge you to consider using a two-person team. As shown above in Figure 6-2-c, working together in teams is ideal for training and it makes conducting sessions easier if you are not experienced. Even professionals who are highly skilled and experienced in conducting feedback sessions often prefer to team up to do the sessions. When you work with a partner, you can focus either on conducting the session or on taking the notes (and you can trade off on these tasks if you like). Working together makes doing feedback sessions easier for both of you, and it tends to produce better results.

The disadvantages of teaming up to do the feedback sessions are generally minor. If you are using your own staff to do the sessions, there may be little or no difference in cost if you use two-person teams rather than individual interviews. And how long it takes to do the sessions will likely depend more on the setting and participants than it does on whether you use two-person teams or individual interviewers.

What about observers?

Sometimes members of the project team or others with an interest in the written material come to observe a feedback session in person. For example, you could invite those who are involved in writing, designing, or supervising the development of the written material to be observers. You could also invite representatives of the sponsoring organization or other stakeholder groups. People who observe a feedback session get a live demonstration of how hard or easy it is for readers to understand and use the written material.

There is mixed opinion about whether allowing observers is a good idea:

- Those who favor allowing observers at sessions emphasize the powerful impact of letting people watch and listen for themselves while readers give their feedback. Letting people see sessions in action is an excellent way to educate and sensitize them to the value of learning directly from readers, as well as giving them insights into ways of improving the material.
- Some think the presence of observers is too distracting, no matter how it is handled.

If you decide to allow observers, it is important to limit the number of people who come to observe, to give them strict instructions to remain silent throughout the session, and to let the participants know that they are being observed. There are several ways to handle observers, depending on the number of observers, type of session, and the site you are using:

- If you are doing focus groups, it is generally okay to allow up to two or three outsiders to sit along the outer edge of the room, in the most unobtrusive spot. The moderator introduces these observers very briefly at the start of the session.
- If you are doing individual interviews, it may be okay to allow one silent observer in the room under certain circumstances. For example, if you are interviewing informants such as nurses or social workers who are not likely to feel inhibited by the presence of an additional person, adding a silent observer would generally be okay. However, if you are interviewing people with poor reading skills, you would definitely not want to add the stress of including an extra person in the room to watch what happens in the interview.

If you need to accommodate observers at your sessions, you may want consider using a professional research facility that has rooms designed for this purpose (e.g., rooms where observers can watch through two-way mirrors).

How will you use the feedback from readers?

How will you use the feedback you get?

- How will you analyze the feedback you get from readers?
- How will you use the results?

As you plan your project, think about how you are going to share and use the results from your sessions with readers. For example, perhaps you will establish a work group to sift through the findings and help make decisions, such as identifying revisions to make, or choosing which materials are best among the ones you are evaluating.

It's very helpful to involve people with different skills and perspectives in this process of analyzing and applying the results from your feedback sessions. For help on how to analyze and apply what you learn from readers, see Toolkit Part 6, Chapter 19, *Using feedback from readers to improve written material.*

What will it cost and what is your timeline?

What is your budget and timeline?

- What is your estimated budget? What resources are available?
- Are there ways to cut costs without sacrificing quality?
- What is your timeline?

Developing and refining the project budget

When you begin planning your feedback sessions, it's helpful to have a written plan with budget and timeline. Start by noting your deadlines and estimating the total funding available for the project, since these will drive some of your decisions. Make time and budget estimates for each part of the project, noting things that have budget impact, such as which staff are available to work on the project, which tasks are to be done by contractors, and any in-kind contributions you can expect.

As you make decisions that affect the budget and timeline, you can update the estimates with actual dates and costs. In developing your written plan, be as specific as possible, to provide a good basis for discussion among team members and to help you spot anything you may have overlooked. Be sure that your time line is realistic, with extra time for unanticipated delays. If you find that the budget or timeline is too tight, scale back the project before you begin.

Budget and timeline implications of the decisions you make

Numerous decisions that you make about project design and implementation will affect the timeline and cost of your project. In many cases, a decision you make in one area, such as how many sessions to hold, affects the time and resources that will be required in other areas. To help with planning, Figure 6-2-d below has comments on the budget implications of some key decisions you will make in planning your project.

Figure 6-2-d. Cost implications of key decisions you make in planning your feedback sessions.

- **Whether you choose focus groups or individual interviews**. Either of these approaches can be quick and relatively inexpensive, or time consuming and costly – it depends on how you implement them. In particular, the costs of doing interviews or focus groups are affected by costs associated with the location, who conducts the interviews, and how you select and recruit participants. For example, if your own staff does interviews using on-site recruitment at a community-based organization, the project will be relatively fast and cost-effective. In contrast, if you hire consultants to do the recruitment and conduct the interviews at a professional research facility, the project will take longer and cost more.

- **Who conducts the feedback sessions.** Labor can be an important component of your overall budget. If you hire outside consultants to conduct your sessions, the cost will likely be higher than if your own staff are able to do it. If you are new to doing feedback sessions, it may be worthwhile to hire consultants who will take the lead on the project and provide training for your own staff as part of their work. For example, the consultants might be the primary interviewers, and your staff could get "on the job training" by serving as the note takers. By investing in training of this type, you would build your own capability to conduct future projects on your own or with more limited assistance from contractors.

- **How many interviews or focus groups you do.** Whether you do interviews or group sessions, doing a larger number of sessions takes more time and will probably cost at least a little more. Fortunately, you can get very useful feedback from a relatively small number of sessions, especially if you split them into two or three rounds so that you can get feedback at different stages of developing the material. How much longer it takes to do a larger number of sessions depends on how you schedule the sessions. For more on this topic, see the last section of Toolkit Part 6, Chapter 6, *Should you do individual interviews or focus groups?*

- **How you select, recruit, and compensate the participants.** Many decisions you make about selecting and recruiting participants will affect both your budget and your timeline. These include, for example, who does the recruitment, the requirements you set for participation, the way you locate possible participants and screen to see if they meet these requirements, whether you offer assistance with transportation or payment for child care, and how much (if anything) you pay participants. For more about this, see Toolkit Part 6, Chapter 14, *How will you select and recruit participants?*

- **Where you hold your sessions**. The location you choose for your interviews or focus groups has a big impact on costs. Professional focus group facilities offer certain advantages but they tend to be quite expensive. Many community settings may be available at no cost or a nominal charge. For more about finding a place that is affordable, see Toolkit Part 6, Chapter 13, *Choosing a location for your feedback sessions.*

- **Whether you tape and transcribe your sessions.** There are tradeoffs to consider when you make decisions about how to capture the feedback you get during your sessions with readers. For many purposes, taking written notes is sufficient, and we give tips on how to do this (see Chapter 17, *Conducting feedback interviews and taking notes*). You may want to consider supplementing the written notes by audio taping or videotaping the sessions. If you do tape the sessions, you will need to decide whether to transcribe them to produce a written transcript. Taping and transcription add to the cost of feedback sessions. For a discussion of issues to consider, see Toolkit Part 6, Chapter 12, *Should you do audio or video recording of your sessions?*

- **How much work, if any, you will do on developing and revising the material.** Some projects evaluate existing materials, so there is no need to budget for writers and designers. But if your project includes development or revision of material, you may need to budget for writers, editors, graphic designers or web designers, as well as for the cost of producing multiple copies of mockups for use in the sessions with readers. The cost of these services can vary enormously depending on the specific needs of the project, the nature of the material, and the extent to which you have resources available in house.

- **How you analyze and report the results of your sessions.** The intensity and methods used to analyze the results from sessions differ greatly depending on the nature and needs of your project. So does the type of reporting, if any, that is done.
    - Suppose for example, that you are working on revising a pamphlet for a community organization. Your plans for data analysis may be modest and informal. Perhaps you will get the project team together at a single meeting to go over the written notes from your feedback sessions and decide what revisions to make. You won't spend time and money on producing a written report because there is no need for one.
    - Or, suppose that you are working on a large-scale research or evaluation project that includes multiple rounds of interviews and focus groups. In this type of project, data analysis might be based on systematic study of written transcriptions of all sessions, and might even use specialized computer programs to help analyze the results. It would likely include a written report, at a minimum. It might include giving presentations at workgroups or conferences and writing articles for newsletters or professional journals.
    - **But this Toolkit is written for people without a research background who have limited time and resources available.** We emphasize practical advice about how to interpret the results of your feedback sessions and use them to improve your written material. We do not cover advanced topics such as how to do systematic analysis of transcripts or produce formal written reports of your findings.

Source: Created for this Toolkit.

Where can you cut costs without undermining quality?

You don't need a big budget or even a lot of time to get great value from sessions with readers. As long as you are careful with planning, design, and technique, you can learn an enormous amount from readers at relatively low cost. Throughout this Toolkit, we point out various ways that you can cut the costs of your project without undermining quality.

How will you evaluate the project?

How will you evaluate the project and document its benefits?

- How will you keep track of the practical things you learn from doing this project so that you can apply them when you do your next project?
- How will you document the benefits of getting feedback from readers?

As you plan your reader feedback projects, consider how you will keep track of what you learn along the way, so that you can apply these lessons learned to have a better, easier time with the next project. Researchers call this doing a "process evaluation." Keeping a project diary and archive is a simple way to incorporate a process evaluation into your project:

- **Project diary.** The diary is your record of what you did, what went well, and what did not. Keep the diary short and simple to encourage people to use it as a reference for the next project. Just make informal notes from time to time about how the project actually evolved, compared to what you were expecting. Tell about problems you encountered, how you handled them, and how well it worked. Include your own advice to yourself about what to do differently next time.

- **Project archive**. Set up an archive folder, and keep it handy. Each time you deal with a project document, drop a copy of it into the archive folder. This should include such things as bids and contact information from vendors, lists of team members and their organizations, copies of important e-mails, and all of the paperwork and mockups related to the sessions themselves. If you make it a habit to accumulate copies throughout the project in your archive folder, it is easy to sort through and organize this folder at the end of the project. Take a little extra time at the end of the project to consolidate all of the electronic files related to the project and put them in the archive folder for easy future reference.

- **Consider supplementing the diary and archive with feedback from team members, vendors, and others.** With a little advance planning, you can sometimes devise easy ways to collect useful feedback from people involved in working on the project. For example, if you hire a research firm to do recruitment for you, you can ask for a brief management report that describes how the work was done and offers suggestions for improvement next time. At the end of the project, you can send team members and stakeholders a brief questionnaire that asks them to reflect on how the project was designed and conducted, and offer constructive criticism. (For help in doing a survey, see references at the end of this chapter.)

Be sure that someone takes personal responsibility for keeping the diary and archive, or it may not get done. The small investment of time and effort in keeping a project diary and archive will pay off when you start the next project. It will help you produce a complete and accurate budget and timeline with much greater ease. You will be able to locate the details you need, such as which vendors you used, the requirements you set for participation, and what proportion of your participants took you up on the offer to help them with transportation. The project diary and archive will be especially helpful to orient new staff who did not participate in the previous project.

Assessing and documenting the value of getting reader feedback

There are many benefits you gain by getting readers' reactions to written materials. When you are just starting to develop materials, reader feedback can steer you in the most promising direction. Getting feedback from readers periodically during a project can help you produce written information that is clear and compelling to the people you are trying to reach. When your written material is easy for people to understand and use, you will communicate more effectively with them. Making written material easier for people to understand and use is a vital part of improving health literacy. For more on this topic and suggested resources, see the *Quick Guide to Health Literacy* (Office of Disease Prevention and Health Promotion [ODPHP], 2002) and Toolkit Part 1.

As you plan your project, think about ways you might document its impact (Balch & Sutton, 1997). How can you gather evidence that demonstrates the benefits of improving written material? Methods for documenting the value of learning directly from readers will differ depending on the nature and scope of your project, as well as the time and resources you have available for evaluation. If you are doing large-scale research, evaluation may be an important component of your work, and you may be able to focus part of it on evaluating the feedback sessions. But you don't have to be a researcher or spend a lot of money to document the value of getting readers' reactions to written materials. There may be some simple and low-cost ways to do it.

For example, suppose that your project used reactions from readers to improve a patient education booklet about managing diabetes. Ideally, you would like to have evidence about the clinical impact, that is, data on management of blood sugar, but collecting such information requires a large budget and specialized research skills. Perhaps you could use a simple survey that asks clinicians or diabetes educators how well the revised booklet is working with their patients. For example, you could ask whether they think their patients understand the revised version better than the old one, and whether reading it seems to make their patients feel more confident about why and how to keep their blood sugar under control.

For an example of documenting the impact of improving written material, see *Creating plain language forms for seniors: a guide for the public, private, and not-for-profit sectors* (1998). This publication describes a project by the National Literacy and Health Program and the Canadian Public Health Association. This project studied the costs associated with using forms that are too difficult for people to understand and complete, and looked at the business case for improving forms. They conducted focus groups with older adults to get their reactions to existing forms and used the results to identify ways to improve forms. This report uses a number of examples from Canadian and Australian businesses and governments that document the business case for improving forms.

End notes

Suggested resources

NCI (National Cancer Institute, National Institutes of Health)
2002 *Making health communications programs work: A planner's guide*.
This 251 page paperback is an updated and greatly expanded version of the classic 1992 NCI "pink book." It provides a wealth of information about planning and implementing health communication efforts. It is written and distributed by the National Cancer Institute (NCI), which is part of the U.S. Department of Health and Human Services, Public Health Service, National Institutes of Health (NIH). NIH publication No. 02-5145, printed September 2002. For a copy, visit the NCI website at http://www.cancer.gov/pinkbook or call NCI's Cancer Information Service at 1-800-422-6237.

Salant, Priscilla A. and Don A. Dillman
1994 *How to conduct your own survey: Leading professionals give you proven techniques for getting reliable results*. New York City: John Wiley & Sons, Inc.
If you want to use survey methods in an evaluation related to your written material, this 232 page paperback book is a great resource. Written in non-technical language for non-researchers, it gives you step-by-step guidance in planning and implementing a survey, and does a good job of explaining sampling. [If you have a research background, see *Mail and Internet surveys: The tailored design method*, second edition, by Don A. Dillman. New York City: John Wiley & Sons, Inc., 2000.]

References cited in this chapter

Balch, George I. and Sharyn M. Sutton
1997 *Keep me posted: A plea for practical evaluation.* Chapter 5, pages 61-74, in *Social Marketing: Theoretical and Practical Perspectives*. Marvin E. Goldberg, Martin Fishbein, and Susan E. Middlestadt, Editors. Mahwah, NJ: Lawrence Erlbaum Associates.

Canadian Public Health Association

1998 *Creating plain language forms for seniors: A guide for the public, private, and not-for-profit sectors*. Ottawa, Canada: Canadian Public Health Association. Visit http://www.cpha.ca or call (613) 725-3769. Canadian Public Health Association, 400-1565 Carling Avenue, Ottawa, Ontario, Canada K1Z 8R1.

NCI (National Cancer Institute, National Institutes of Health)

2002 See above under *Suggested resources.*

ODPHP (Office of Disease Prevention and Health Promotion, U.S. Department of Health and Human Services)

2002. *Quick guide to health literacy*. It can be downloaded from: http://www.health.gov/communication/literacy/quickguide/.

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