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 5

Creating a list of “feedback issues” to use in testing the material

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

TOOLKIT Part 6, Chapter 5

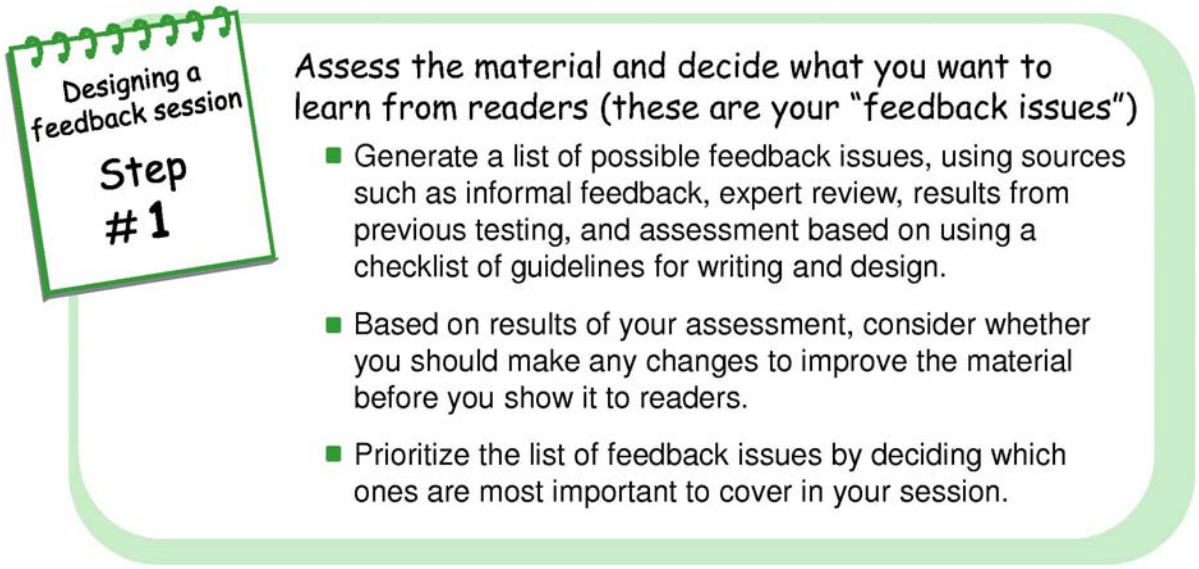
Creating a list of "feedback issues" to use in testing the material

List of figures in this chapter:

This document is the fifth 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

The previous chapter outlined five steps for designing a feedback session. This chapter discusses how to implement the first step in the planning process, which is shown below.

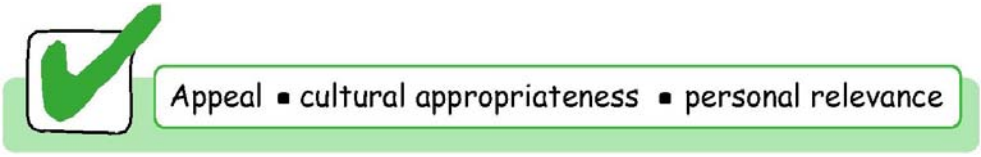


A checklist of common feedback issues

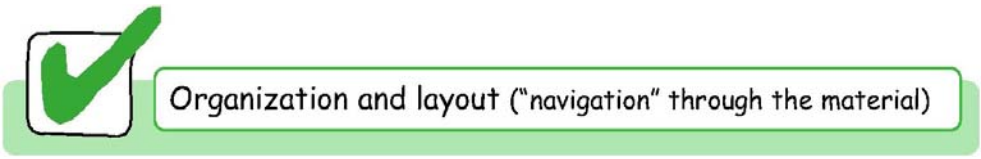
In a feedback session, you are testing how well your written material is working for its intended readers. "Feedback issues" are the focal points of your sessions with readers. They are questions or issues you will explore during the session by getting reactions directly from readers. Getting readers' reactions to your feedback issues will help you understand how well the written material is working for them and how it might be improved.

There are many possible topics to pursue as feedback issues. To help you understand the range of things you can learn by getting feedback directly from readers, Figure 6-5-a below has a checklist of common feedback issues.

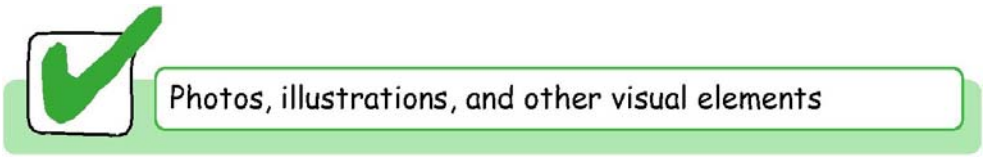
Figure 6-5-a. What you can learn from sessions with readers: A checklist of common feedback issues.



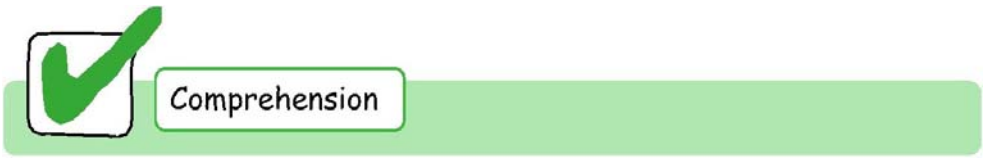
- Do readers find the material attractive and inviting at first glance? Does it attract and hold their attention?
- Does the material seem personally relevant to readers? Do they feel like it was written for them?
- Does the material make readers feel respected and understood? Does the material fit with readers' cultural traditions and beliefs? Do readers find the content and visual elements of the material personally acceptable and culturally appropriate?
- Do readers react positively to the writing style and general tone of the material? Do they think it seems friendly and supportive? Does it help put them at ease and motivate them?
- Overall, do readers have a positive reaction to the material?



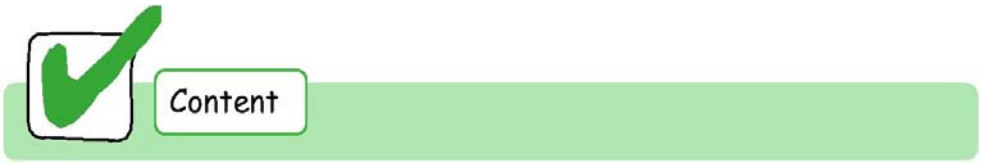
- Does the way the material is organized and packaged make sense to readers? (Is it sequenced, grouped, and labeled in a way that makes sense to readers?)
- Is the text itself clear and legible enough for ease of reading (enough contrast, large enough type size, enough white space, etc.)?
- Is it easy for readers to skim through the material and see what it's about? Is it easy for them to locate specific information?
- Is the page layout and graphic design working well for readers? (Is there a clear and obvious path for the eye to follow? Does the page layout and placement of visual elements guide readers smoothly through the material without distracting them or causing them to overlook certain parts of the material?)



- Do readers find the visual elements appealing and culturally appropriate?
- Do readers find the visual elements helpful in understanding and using the material?

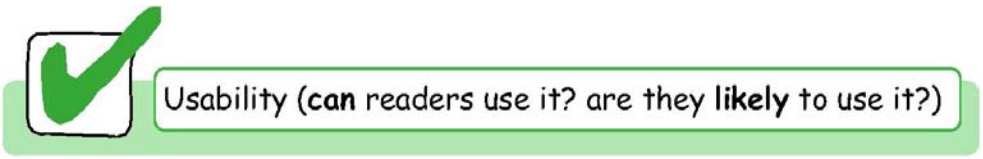


- Is the purpose of the material immediately clear? Do readers understand what they are supposed to do with the material?
- Is it easy for readers to understand all of the material, including the headings and images as well as the text? Are there any terms or concepts that are hard for readers to understand? Are the definitions, explanations, and examples easy for readers to understand?
- Can readers understand the purpose and content of diagrams, illustrations, and other visual aids?



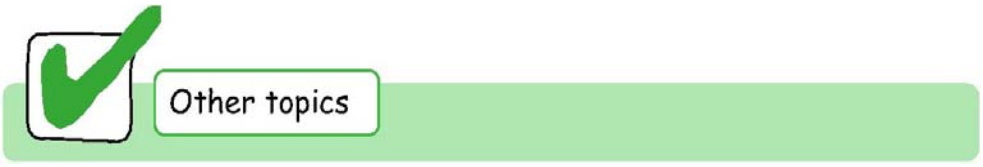
- How much do readers already know about what's covered in the material? How do they feel about this subject matter? Do they have any misconceptions? Any strong feelings or concerns?
- Does the material meet an information need and seem potentially useful to readers? Do readers care about what it says? Does reading it seem worth the time and effort to them?
- Do readers think the material gives them information they need, at the right level of detail? Did they learn anything new from it? Does the material leave readers with any points of confusion or unanswered questions?
- Does it seem too long, too short, or about right? Is there any information they think should be dropped or added?

- Do readers find the content personally and culturally acceptable? Do they believe it and trust what it says? Do they think what it asks them to do is realistic and feasible for them?



- Are readers **able** to use the material for its intended purpose? (*A few examples:* Can readers use the material to make a decision? Can readers use the material to find answers to their questions? Can readers use the material to make healthier choices about what to eat?)

- Do readers think they actually would use the material? (*A few examples:* Can readers see themselves using the material in the way that's intended? Do they plan to do something, or something different, as a result of reading the material?)



Other possible feedback issues

- How or where would readers expect or prefer to receive the material?

- Do readers have suggestions or preferences for how the information is packaged (size, layout, type of material, etc.)?

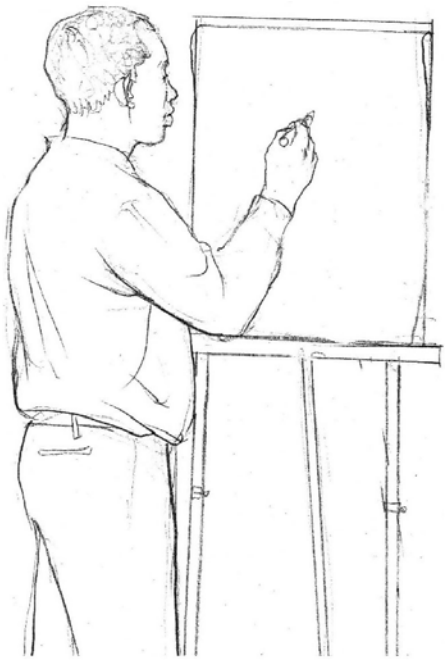
- Do readers have suggestions for ways to improve the material?

Source: This checklist was created for purposes of this Toolkit. It draws on the writer's and her colleagues' experiences in testing written material and also on themes and topics that are covered in various ways in source materials that include the Toolkit Guidelines for Writing and Design (Toolkit Parts 3, 4, and 5); Doak, Doak, & Root, 1996; Dumas & Redish, 1999; Root & Stableford, 1998; *The Health Literacy Style Manual* (MAXIMUS, 2005); CDCynergy; and Willis, 2005.

How to create your own list of feedback issues

To create your list of feedback issues, start by thinking about what you want to accomplish by having readers react to your written material. Usually, your goal is to find out how well the material is working and how you can improve it. So to get the most useful feedback from readers, try to identify the strengths and weaknesses of the material, so that you can emphasize any areas you think are problematic when you seek reactions from readers. To generate your list of feedback issues, try asking the questions shown below in Figure 6-5-b.

Figure 6-5-b. Questions to help you create your list of feedback issues.



What are your feedback issues?

- What issues or problems with the material have you already identified?
- Is there anything else about the material that you think might be a barrier for some readers?
- Have you made any recent edits or changes in formatting to fix problems with the material? (It's wise to get feedback to see how well they're working.)
- Are there any questions you want to ask participants before you show them the material? (Sometimes it's helpful to check on preconceptions or familiarity with topics and terms before you show the material.)
- What else would you like to learn from readers?

Source: Created for this Toolkit.

Get a broad range of input

The questions listed above in Figure 6-5-b are good questions for team discussion. Try to get your entire team involved in responding to these questions. Project planners, writers, editors, graphic designers, subject matter experts, cultural informants, translators, representatives of community-based organizations, and others who are involved with the project have different experiences to draw from and different areas of expertise. Each is likely to have unique insights about possible problem areas in the materials. If you get everyone involved, you will do a more thorough and effective job of generating your list of feedback issues.

Team members can use the questions in Figure 6-5-b as triggers for discussion. They can use the checklist in Figure 6-5-a above as a starting point for getting oriented about feedback issues and as a reference tool to help generate the list of issues for your project. The checklist is not intended to be comprehensive, but it covers most topics you might want to consider addressing in your feedback sessions with readers. Looking over the list may help you select certain areas to emphasize in your session.

When you identify feedback issues for your own sessions, some of them may be broad and general, much like the ones in Figure 6-5-a above. But many will likely be more specific, because you will be applying a general feedback issue to some specific part of your written material. For example, instead of asking, "Are the definitions, explanations, and examples easy for readers to understand?" your feedback issue might be, "Do readers understand the definition of 'preventive care' on page 12?"

Approaches to use

As suggested by the questions shown above in Figure 6-5-b, you can use several approaches to identify strengths and weaknesses in the material you will be testing. These include:

- **Reviewing informal feedback.** If you are revising or adapting existing written material, start by reviewing what you have already heard about its strengths and weaknesses. You can use this information to help guide your revisions and to identify feedback issues. For example, if your customer service staff keeps getting calls from people who are confused by a particular paragraph in a notification letter, you know that there's a problem with that paragraph, and so you would include checking on reactions to that paragraph as one of your feedback issues. Or perhaps you have heard from patient educators that their patients find your pamphlet on heart disease too gloomy, and they don't want to read it. If so, you would include checking on the content and tone of the pamphlet as a feedback issue.

- **Reviewing what you have learned in previous feedback sessions.** If you have already done some feedback sessions for this project or a similar project, go over the results.

- **Getting opinions and advice from cultural informants.** Cultural informants are people who have first-hand knowledge about the culture of your intended readers. They might be members of your intended audience, staff from an organization that serves the community of your intended readers, or others who are familiar with your intended readers. These cultural informants can help you understand your audience more fully, and they can help you spot language, concepts, images, and other aspects of the material that might be problematic for use with this audience. Ask them to help you identify feedback issues related to cultural appropriateness of the material. Later on, these same cultural informants may be able to help you with recruiting participants to your feedback sessions and finding a good location for the sessions.

- **Considering whether to check on revisions that have been made.** If you have made any significant changes to the material, it's a good idea to get feedback from readers to see how well the changes are working. You can also use readers' reactions to verify that you didn't inadvertently create any new problems when you made the changes.

- **Considering whether there are questions you need to ask participants before you show the material to them.** For example, you may want to find out how much a person already knows about the topics that are covered before you show the material. You might also want to ask about beliefs or attitudes or check on preconceptions.

- **Doing a systematic assessment based on guidelines for writing and design.** For an in-depth, systematic evaluation of the strengths and weaknesses of the material, you can use the *Toolkit Guidelines for Writing and Design* as an assessment tool. Toolkit Part 3 has the full list of guidelines and gives tips on how to use them to conduct an assessment.

    - These guidelines emphasize features that help make written material more effective for culturally and linguistically diverse audiences that include people who are less-skilled readers. The guidelines are comprehensive and detailed, and will help draw attention to aspects of the material that may not come up as part of informal feedback.

    - Applying these guidelines to the material you will be testing can help you identify areas of possible weakness to focus on during your feedback sessions.

    - Applying the guidelines might also identify improvements you will want to make even before you show the material to readers.

A sample list of feedback issues
(Arthritis Booklet Project)

To illustrate activities involved in doing sessions with readers, we created a fictional project that we call the "Arthritis Booklet Project." Beginning in Figure 6-5-c below, we use this project as a recurring example in this Toolkit. Figure 6-5-c below begins with background on the purpose and sponsorship of this project and then shows a list of feedback issues the project team has generated. This example will help you picture what a list of feedback issues might be like.

Figure 6-5-c. Arthritis booklet project: feedback issues grouped by topic.

Project sponsors:

This project is sponsored by a coalition that includes the local arthritis association, a group of health educators, several health plans, and a state agency that deals with health promotion and prevention.

Project purpose:

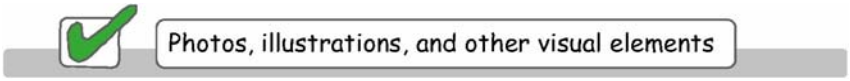
To conduct feedback sessions with older adults and get their reactions to a draft version of a new booklet that encourages people with arthritis to get more exercise. Feedback sessions will consist of 15 individual interviews with men and women in their sixties and seventies who have arthritis.

Feedback issues:

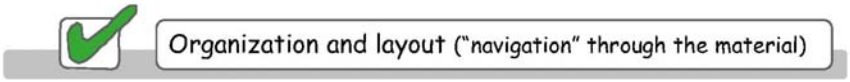
The project team members and representatives from the sponsoring organizations have created a list of feedback issues they would like to cover in these interviews. This list is shown below (it uses topic headings from the Checklist of common feedback issues shown earlier in this chapter in Figure 6-5-a).

Feedback issues grouped by topic:

- Get first impressions of the booklet.



- Show proposed photos and ask for preferences. There are two possible photos for the cover and six possible photos to use in different places inside the booklet.



- Check to see whether readers can easily find their way through the booklet.
- Check on whether the headings make sense to readers. Are there enough to make the booklet easy to skim? Do the headings stand out enough?

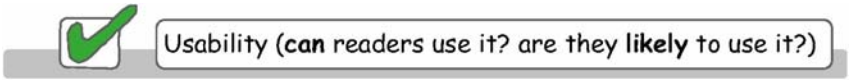
- Find out if the main message comes across clearly. Get reactions to this message: Do readers believe it? Do they have any questions about it? (The main message is that getting regular exercise of the right type will reduce the pain of arthritis and enhance mobility. Some people with arthritis still believe that exercise is bad if you have arthritis.)
- Check on how well people understand the guidelines on page 4 that tell what is "appropriate" exercise for people with arthritis.

- Before showing the booklet, find out what the reader thinks about exercise and arthritis (in order to see if the main message in the booklet is new to the reader).
- Get reactions to proposed titles for the pamphlet (there are three versions to show them).

- Get readers' reactions to the back cover of the booklet that shows the names and logos of the sponsoring organizations. Do they recognize these organizations? Does knowing that these organizations produced the booklet have any impact on how readers feel about the booklet and its advice?

- Ask about participants' own experiences with exercise, especially any barriers to getting exercise and any problems they've had, to see whether and how well the booklet addresses possible barriers and problems.

- Check on reactions to the content. For example, did they learn anything new? Is anything missing? Is it at the right level of detail? Does it seem friendly and supportive?



- Ask readers if they plan to do anything different as a result of reading this booklet.

- Get readers' ideas on how we should distribute this booklet. Where and how would they expect to get it?

Source: Fictional project created for use as a recurring example in this Toolkit.

Should you make improvements before you show the material to readers?

What if you identify big problems with the material?

When you are working on your list of feedback issues, you will be identifying the strengths and weaknesses of the material. If your assessment of the material reveals any significant problems, it's wise to try to fix them before you show the material to readers. That way, you can use the feedback sessions to your best advantage, by checking on how well you have fixed the problems and getting feedback to help you fine-tune the rest of the material.

For help on how to improve the material before you show it to readers, see Toolkit Parts 3, 4, and 5. These Parts present the *Toolkit Guidelines for Writing and Design* and explain how to apply them to your written material.

Some of these other Parts of the Toolkit may be helpful as well: Toolkit Part 7, *Using readability formulas: a cautionary note*; Toolkit Part 9, *Things to know if your written material is for older adults*; and Toolkit Part 10, *"Before and after" example: using this Toolkit's guidelines to revise a brochure*.

Decide which feedback issues are most important

Is your list of feedback issues really long? Often, there are too many issues to address in a feedback session, and you have to decide which ones are most important. And even if your list of feedback issues is relatively short, it's still a good idea to examine the issues and decide which ones are most important. Prioritizing your list helps you design a session that uses your time with readers in the most productive ways. When you know which issues are your top priorities, you can make sure to cover them.

Group your feedback issues according to importance

When you are ready to start prioritizing, try grouping your feedback issues into two or three categories based on importance. Your priorities may shift a bit as the project progresses:

- **At this stage, you are not trying to eliminate issues from the list; you're just deciding which seem most important.** Dividing your list of feedback issues into groups based on priority will help you make decisions about how to organize and structure your session.

- **Later, when you are figuring out how to get readers' reactions to each issue, you will revisit your priority list and you might decide to revise it.** If you are a beginner, it can be hard to know how long it will take to get feedback on a particular topic. Eventually, you will need to look at how much time is available and decide how many feedback issues you can actually cover. In part, how many you can cover will depend on factors that include the approach you take and how thoroughly you cover each issue. You may even decide to split up the set of feedback issues and cover some of them with one group of participants and the rest with another group.

- **In the end, when you are creating your written guide for conducting the sessions, you will make the final decisions about which feedback issues you can include**. Generally, it makes sense to concentrate on the key messages in the material and the feedback issues that affect these key messages.

An example of issues grouped by importance

Figure 6-5-d below gives an example of feedback issues grouped by importance.

Figure 6-5-d. Arthritis booklet project: feedback issues grouped by priority.

Earlier in this chapter, Figure 6-5-c. showed a list of feedback issues for the arthritis booklet project that was arranged by topic. Now, shown below, this list has been **rearranged so that feedback issues are grouped by priority.** This new grouping by priority reflects the Arthritis Booklet project team's views about the relative importance of each feedback issue.

Feedback issues grouped by priority:

1 Most important to include

- Get first impressions of the booklet.
- Get reactions to proposed photos. There are two choices to show for the cover and seven to show that could be used in three or four different places on the inside of the booklet.
- Find out if the main message comes across clearly. Get reactions to this message: do readers believe it? Do they have any questions about it? (The main message is that getting regular exercise of the right type will reduce the pain of arthritis and enhance mobility. Some people with arthritis still believe that exercise is bad if you have arthritis.)
- Check on how well people understand the guidelines on page 4 that tell what is meant by "appropriate exercise" for people with arthritis.
- Ask readers if they plan to do anything different as a result of reading this booklet.

2 Also important to include

- Check to see whether readers can easily find their way through the booklet.
- Check on whether the headings make sense to readers. Are there enough to make the booklet easy to skim? Do they stand out enough?
- Before showing the booklet, find out what the reader thinks about exercise and arthritis (in order to see if the main message in the booklet is new to the reader).
- Get reactions to proposed titles for the pamphlet (there are three versions to show them).
- Ask about participants' own experiences with exercise, especially any barriers to getting exercise and any problems they've had, to see whether and how well the booklet addresses possible barriers and problems.
- Check on reactions to the content (Did they learn anything new? Is anything missing? Is it at the right level of detail? Does it seem friendly and supportive?)

3 Include if possible

- Get readers' reactions to the back cover of the booklet that shows the names and logos of the sponsoring organizations. Do they recognize these organizations? Does knowing that these organizations produced the booklet have any impact on how readers feel about the booklet and its advice?
- Get readers' ideas on how we should distribute this booklet. Where and how would they expect to get it?

Source: Fictional project created for use as a recurring example in this Toolkit. For background on this fictional project, see Figure 6-5-c earlier in this chapter.

What sequence will you use to get feedback on the issues during a session?

Once you have decided which issues are the most important to include in your sessions with readers, give some thought to how they should be arranged for use during the sessions. What sequence of topics will make the most sense to readers, and provide a smooth flow from one topic to the next? Here are some tips:

1. **Start by identifying any issues you need to cover before you show the material to readers**. This includes things you might want to find out at the beginning so that the responses won't be influenced by what the reader sees in the material. It also includes information that is helpful to know up front so that you can use it to adapt some of the questions you ask. Here are examples:

   - Do you want to ask questions that explore what the reader already knows about the topic covered in the material and any related experiences the reader has had? For example, if the material is about Medicare's procedures for appeals and grievances, you may want to ask if the person has ever made an appeal or filed a grievance.

   - Do you want to ask any questions that check on the reader's preconceptions or check on familiarity with terms and concepts that appear in the material? It can be helpful to spend a few minutes at the beginning of the interview to learn about the attitudes and assumptions the reader is bringing to the material. For example, suppose that the material is a booklet about getting screened for prostate cancer. Before you show the booklet, you may want to find out what the man you are interviewing knows about prostate cancer and its treatment, and what, if anything, his doctor has said to him about getting screened.

2. **Next, try putting the rest of the feedback issues into a sequence that follows the sequence of the material itself.** Often, it makes sense to start at the beginning and follow the sequence of the written material. For example, you might start with feedback issues that deal with first impressions, and then go on to the ones that deal with the title and cover, and so on. Try this approach of following the sequence in the material: how well does it work?

3. **Then, consider whether it makes sense to divide the material into sections.** If you divide the material into sections, you would group together the feedback issues that apply to each section.

4. **Go over the list of feedback issues that you have rearranged and mark the ones that are highest and lowest priority.** Later on when you are deciding which methods to use for each

section or feedback issue, you will want to focus mainly on your highest priority issues. If time is limited and your list of feedback issues is long, you may have to mark the lowest priority issues as "optional – ask only if time permits."

5. **Take a final look at the list you have rearranged**. Do you think this sequence will work well for conducting the session? Do you need to make any adjustments? For example, you might decide to move all of your lowest priority questions into a separate section at the end.

End notes

References cited in this chapter

CDCynergy (CD-ROM)

CDCynergy is a multimedia CD-ROM used for planning, managing, and evaluating public health communication programs. Originally developed for use within the Centers for Disease Control and Prevention, it has been adapted for widespread use by public health officials. For more information see the website: http://www.cdc.gov/healthmarketing/cdcynergy/index.htm (accessed September 8, 2006).

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