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 9

Tips for collecting particular types of feedback from readers

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

TOOLKIT Part 6, Chapter 9

Tips for collecting particular types of feedback from readers

List of figures in this chapter:

This document is the ninth 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

What is this chapter about?

This chapter offers tips for addressing specific types of feedback issues in your sessions with readers. These tips use the same topic headings as the checklist of feedback issues shown earlier in Chapter 5 (Figure 6-5-a, *What you can learn from sessions with readers: a checklist of common feedback issues*). These topic areas are (1) appeal and cultural suitability, (2) navigation (effectiveness of the layout and organization), (3) visual elements such as photographs and illustrations, (4) comprehension, (5) content, and (6) usability.

How can you use this chapter?

This chapter is a topic-specific resource to help you collect particular types of feedback from readers. You can use it in several ways:

- **Use it to review typical feedback issues under each topic heading.** To help you get oriented, and to refresh your memory, we begin each section with a bulleted point summary of typical feedback issues for the topic area.

- **Use it to get ideas when you are designing your session**. This chapter has suggestions for approaching various topics. It offers sample questions that you can use as a starting point, and adapt to suit your needs. It also suggests some tasks you can use to collect particular types of feedback.

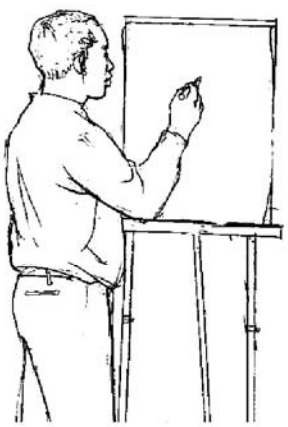
- **Use it to learn about which approaches tend to work better than others**. This chapter has suggestions about the most effective ways to get certain types of feedback, and discusses some approaches to avoid.

This chapter is organized by topic, but you will find a great deal of overlap among the topics. Many times, the sample questions we give in one section could just as easily be given in a different section. For example, some questions that assess initial appeal also assess reactions to visual elements. Some of the tasks you could use to check on comprehension also check on usability. Our goal is to offer an assortment of ideas and examples that you can use in different ways and adapt for your own purposes.

Tips for assessing appeal, cultural suitability, and personal relevance

Appeal ▪ cultural suitability ▪ personal relevance

What are common feedback issues for this topic?



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

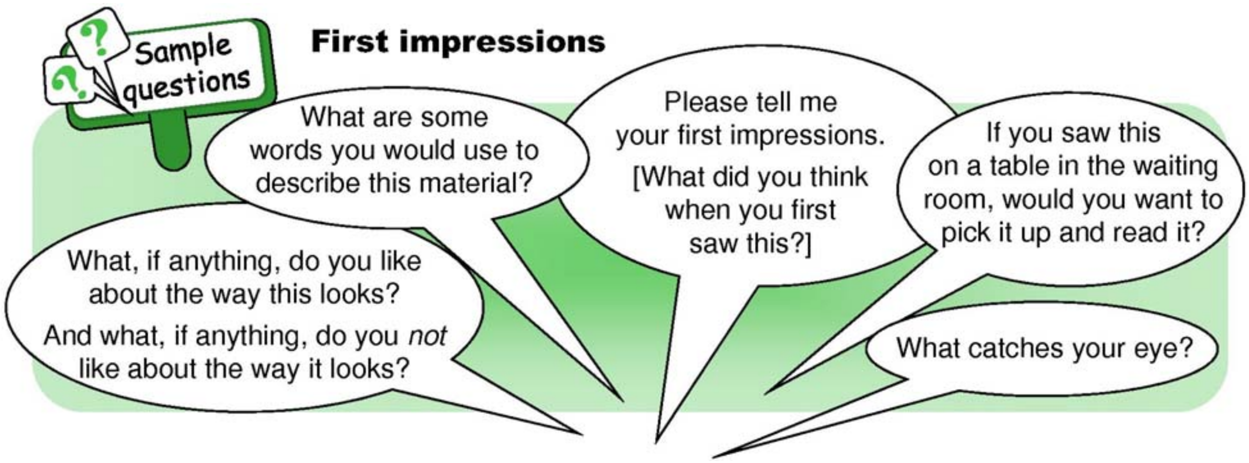
Source: Toolkit Part 6, Chapter 5, Figure 6-5-a.

Seeking feedback on initial appeal

To be clear and effective, written material needs to attract and hold readers' attention. When you are doing a feedback session, it's typical to start by getting readers' first impressions of the written material. You want to get initial reactions while they are fresh, because once people start reading, their reactions to the material can change.

Usually, you will give feedback participants instructions to "think aloud" as they go through the material. To encourage them and make clear what you mean by "thinking aloud," you can give a demonstration using a different piece of written material as your prop. A later chapter on interviewing technique gives you details on how to do this (in Chapter 18, see Figure 6-18-b, *Helping readers "think aloud" by demonstrating with an example*).

Often, readers will share their first impressions spontaneously as they *think aloud*. You can also ask questions to check on initial appeal. Here are ideas about ways to do this:



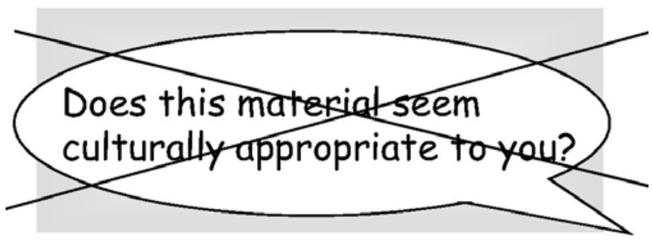
Checking on cultural suitability

To be clear and effective, written material needs to culturally suitable for its intended readers. When it is culturally suitable, readers feel that it was written for them. They feel respected and understood, because the material fits with their cultural traditions, beliefs, and values. It responds to the readers' interests and experiences, anticipating questions or concerns they might have. The tone is friendly and supportive, putting them at ease and making them feel receptive to the information.

Figure 6-9-a below offers tips on ways to check on whether readers find the written material to be culturally suitable.

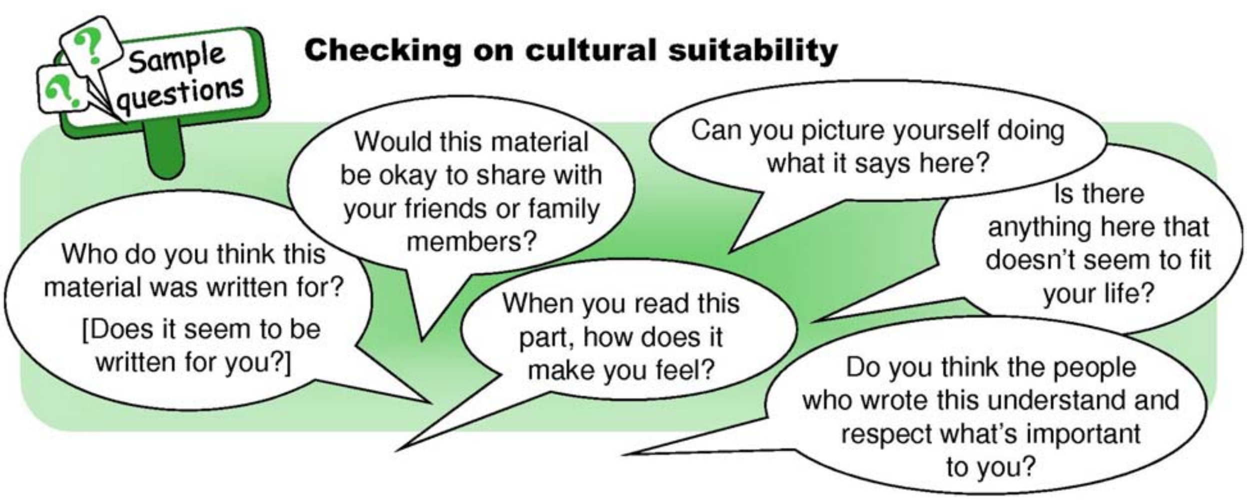
Figure 6-9-a. Checking on cultural suitability.

Asking people directly about cultural appropriateness doesn't work. When you want to find out whether written material is culturally acceptable to the intended readers, don't use the wording that's shown below:



Terms like "culturally suitable" or "culturally appropriate" are professional jargon. These terms are not familiar to most readers you will be interviewing. If you use these terms in the questions you ask during a feedback session, they won't work well. Neither does the term, "culture." Although it's a more familiar word, "culture" tends to mean different things to different people.

Other approaches will work better. There are ways to get readers to talk about the cultural aspects of the material without using "culture" or "cultural" in the question wording. Here are some examples of lines of questioning you can use:

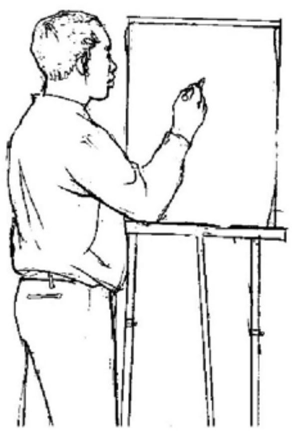


Source: Compiled and adapted for use in this Toolkit, based on the writer's personal experience with feedback sessions and suggestions from colleagues. For more about checking on cultural suitability, see discussion in Doak, Doak, & Root (1996).

Tips for assessing ease of "navigation"

Layout and organization ("navigation" through the material)

What are common feedback issues for this topic?



- 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 readers 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?)

Source: Toolkit Part 6, Chapter 5, Figure 6-5-a.

Written materials are a combination of text and visual elements, and both affect ease of navigation. When you do feedback sessions with readers, you can learn a lot about ease of navigation by observing what they do with the material. People have different basic styles in responding to documents. Some start at the beginning and read everything, and others skim quickly through it. Readers can move through the material in unpredictable ways, flipping from one page to the next, responding to what catches their eye or looks interesting. Even among skilled readers, those who are "skimmers" and "flippers" can miss important points, especially if the document is not designed to work well for skimming.

In other parts of this Toolkit, we discuss navigation issues in detail and give guidelines for creating an organization and overall design that will help readers understand and use the material:

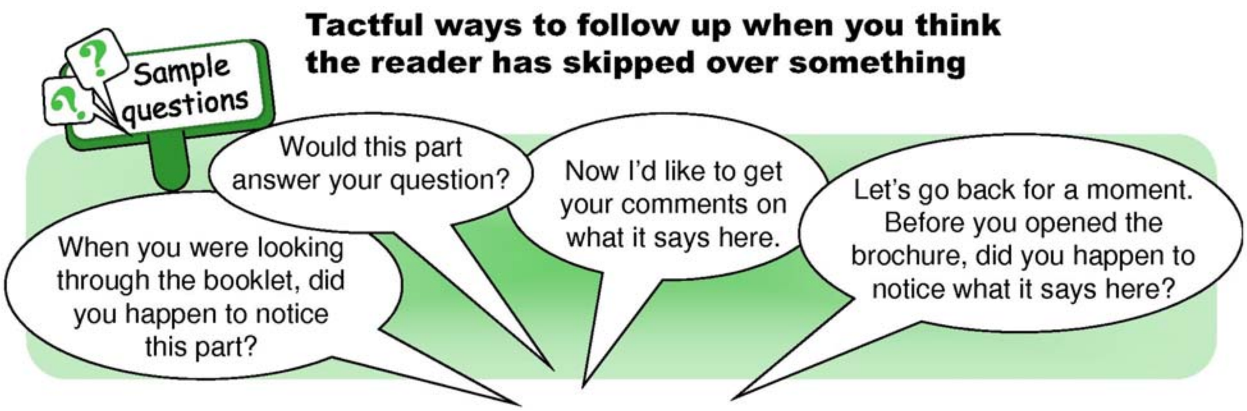
- Toolkit Part 4, *Understanding and using the "Toolkit Guidelines for Writing"*, has four chapters, one of which focuses on ways of organizing the content (Chapter 2). This chapter gives tips for sequencing, grouping, and labeling the content, emphasizing the need for plenty of headings that are clear and informative.

- Toolkit Part 5, *Understanding and using the "Toolkit Guidelines for Graphic Design"*, has eight chapters, and several of these focus heavily on issues related to navigation. Chapter 2 is about page layout and overall design. It explains the concept of "reading gravity," showing ways to create a clear path through the material that helps people notice everything on the page. Chapters 3 and 4 explain how to use contrast and navigation devices such as headings and bulleted points to help readers see how the material has been organized and make it easier for them to skim.

The Toolkit guidelines and discussion about ways to organize and "package" the written material will help you avoid some common barriers to navigation in written material. Then you can use your feedback sessions with readers to find out how well your material is working for them. When you interview readers, you can use a combination of methods to assess ease of navigation. For example, you can ask readers to share their thoughts and reactions by "thinking aloud" and then watch what they do with the material. Sometimes, the remarks they make during *think aloud* will give you clues about navigation barriers. As you watch what readers do with the material, see if you can tell which parts of the page are drawing their attention, and which parts they seem to skip over or ignore. For example, suppose that readers are tending to skip the top of one page.

If readers are skipping over part of the material, it's helpful to find out whether it's a navigation issue or something else. Is there something about the layout or design that is causing them to overlook that part of the page? Are they skipping it deliberately due to lack of interest in the topic? Or are they skipping it because it uses words they don't know and it looks hard to read?

By following up, you can often get more feedback that helps you understand what is happening and how it could be fixed. When you follow up, you need to do it carefully, so that readers won't feel that you are criticizing them for not noticing everything on the page. Below are some sample questions that show ways to follow up and find out more about what is going on:

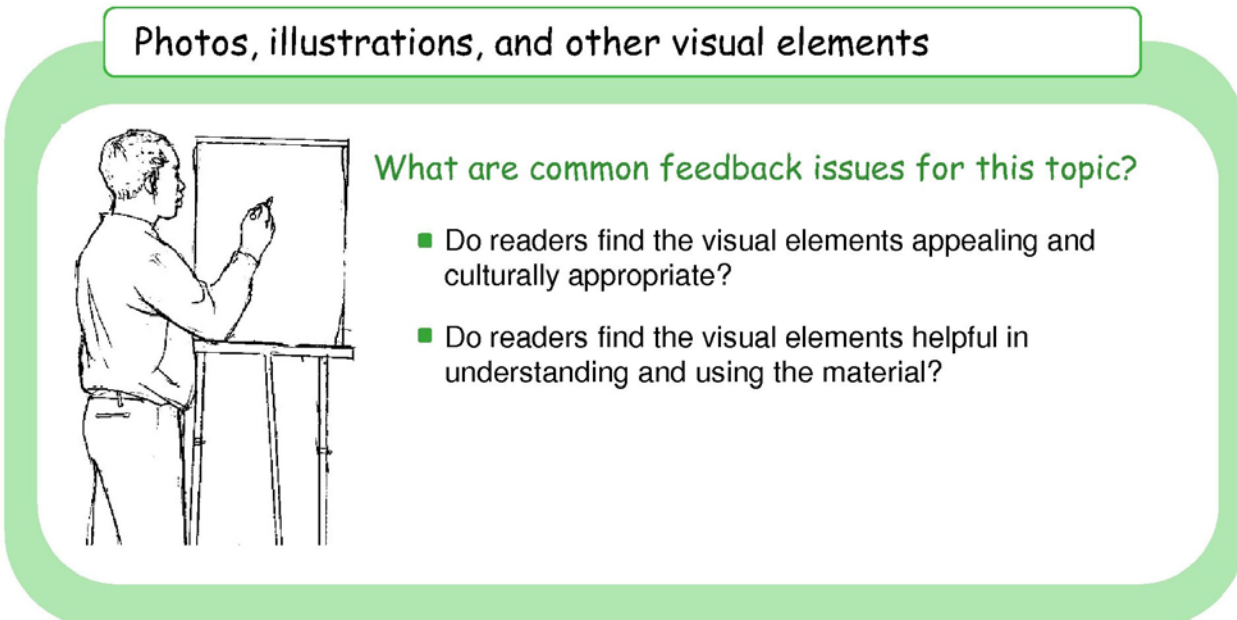


Here are some other tips for assessing ease of navigation:

- One of the most informative ways to assess ease of navigation is to give readers a task to perform that involves using the material. You can adapt the task to suit the material. For example, you could ask them to find a specific type of information and then watch how they go about doing this task. You could say, *If you wanted to know {insert topic} where would you look?* If the material is long, it probably has page numbers and a table of contents. It might also have other navigational devices such as headers or footers. When you give readers a task that involves a search for specific information, you can watch to see whether and how they use these devices.

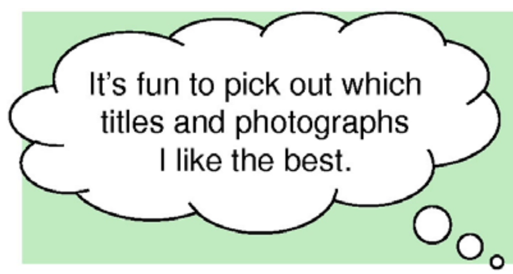
- Many people make snap judgments about the meaning and personal salience of materials based on skimming quickly through. You can use feedback sessions to find out how well the headings and other navigation devices are working for those who skim through the material. To find out whether readers are accurately interpreting the cover page, titles, and headings, you could show just these parts in isolation and then ask readers to elaborate on their impressions or expectations. For example, you could put each heading on a separate card and then show the series of cards to the reader. You could ask for a reaction to each card, such as asking, *Here's the heading for the next section. Just from looking at this heading, what do you think the next section is going to be about?*

Tips for getting reactions to visual elements



Source: Toolkit Part 6, Chapter 5, Figure 6-5-a.

During a feedback session, you can get readers' reactions to photographs, illustrations, and other visual elements such as cover designs, color schemes, and page layouts. You may want to show several versions and ask for their preferences. People enjoy looking at alternatives, and asking for their preferences signals that you value their opinions.



Here are some tips:

- Try to get feedback on visual elements at an early stage in developing your materials, while there is still time to make changes that respond to readers' preferences.

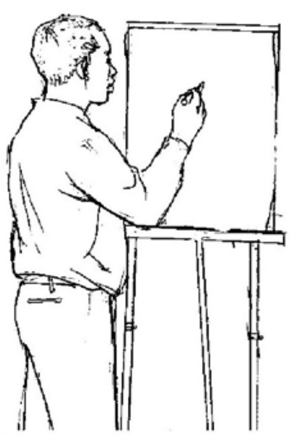
- If you want to get reactions to a whole group of photos, you could use a "photo sort" task. Mount each photo on a card, and then ask people to sort them into different piles that reflect their preferences. For example, there might be one pile for the ones they think are best to use in the material, another for those that are acceptable, and a third pile for the ones they reject. If there is a small group of photos, you could ask people to put them into order of preference (rank order).

- When you ask for preferences, be sure to follow up by asking for their feedback on the images themselves. While it's helpful to know which ones they prefer, it's even more helpful to know what it is about various images that triggers their reactions. When people start talking about images, they will often give you very specific and useful feedback, such as saying *This one is good, but it should be a close-up instead*, or *I like the pose in photo A and the background in photo C*. They may single out elements that they find outdated or culturally inappropriate, such as saying, *That phone looks way out of date*, or *No teenager would ever dress like that.*

Tips for finding out how well readers understand the material

Comprehension (how well they understand the purpose and content)

What are common feedback issues for this topic?



- Is the purpose of the material immediately clear? Do readers understand what they are supposed to do with it?
- 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?

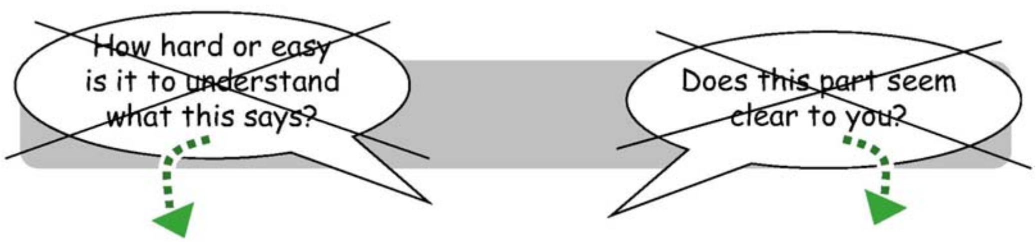
Source: Toolkit Part 6, Chapter 5, Figure 6-5-a.

Getting readers to reveal their interpretations

Checking on comprehension is generally a vital part of any feedback session. You want to make sure that readers understand the written material, and the best way to find out is to get reactions directly from them.

As shown below in Figure 6-9-b, how you check on comprehension is crucial. Asking whether readers think it is easy to understand does not work well. Instead, to get feedback that will be useful in making improvements, you need to get readers actively involved in verbalizing their interpretations.

Figure 6-9-b. Checking on comprehension: An indirect approach works best.



Usually, you won't learn much by asking questions like the ones above that ask people for their judgments about ease of understanding. Here's why:

1 You learn nothing about how people are actually interpreting what they've read

You are only getting their **opinion** about ease of understanding and you don't know what meaning they have taken from the text. Without knowing how they are interpreting the text, it's hard to spot possible problems and figure out how to fix them.

2 You can't take people's answers at face value

People can think the material is easy to understand, but be misinterpreting what it says – and *you won't know.*

In addition, this type of question puts people on the spot. It can be uncomfortable for some people to say that they are having trouble understanding what they read. If they hold back, you will miss getting feedback on what is hard to understand.

These approaches work **better** for checking on comprehension:

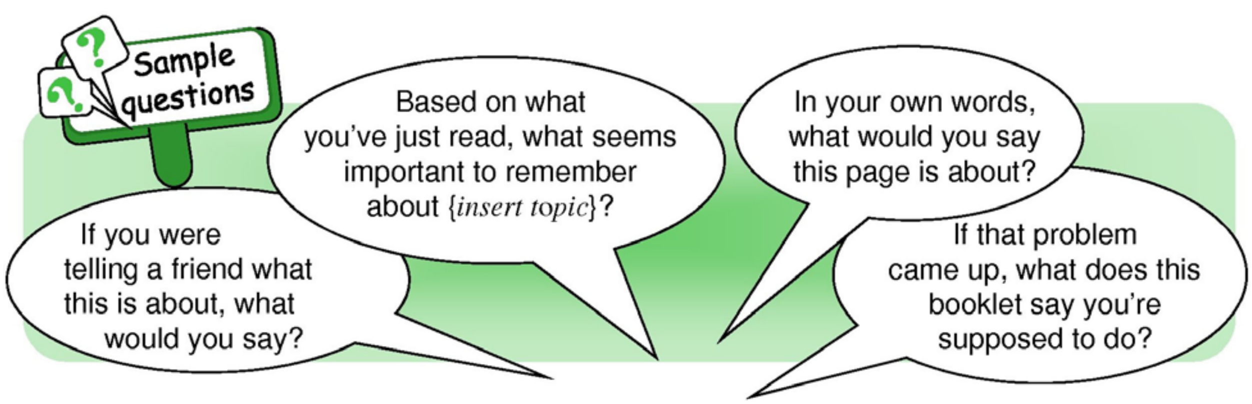
1 Have people show you (or mark) all places where they had to read something twice

You can give people a pen and ask them to mark these places while they are reading the material (see Toolkit Part 6, Chapter 18, Figure 6-18-c, *Encouraging people to mark on the document as they read*).

Or you can simply ask them to tell you: "If you ever go back and read something twice to figure out what it's saying, please let me know. When something isn't clear right away, that's a problem, and the people who are trying to improve this material want to know about the problems."

2 Ask questions that get people to tell you **in their own words** what the material says

Below are sample questions that show indirect ways of checking on comprehension. Asking questions of this type that get readers to paraphrase helps reveal which parts of the material are drawing their attention and how they are interpreting what they read.



Source: Created for this Toolkit.

As shown above in Figure 6-9-b, the best way to determine whether people understand the material is to get them to talk in their own words about what they have read. What they say will reveal how they are interpreting what they read. What they say can also help show you which parts caught their attention. In responding to your questions that ask them to explain what it says in their own words, readers will give you insights into the attitudes and assumptions they have about the topics covered in the material.

Here are a few more tips about checking comprehension:

- To get the most informative feedback, be sure to ask follow-up questions. Express interest in hearing more from them, and take care not to make them feel as if they are being tested. For help with this, see the tips on effective interviewing in Chapter 18. These tips include examples of ways to phrase your questions that will encourage people to feel comfortable about sharing whatever comes to mind.

- If people start reading again to answer the question, you can gently steer them away from re-reading. For example, you might say, *Oh, just in your own words is fine.*

- When you are checking on comprehension during a feedback session, watch for situations where readers seem to be answering your questions about the material by sharing their prior knowledge and views rather than responding to what they have read. For example, when you ask them to tell you what the booklet is saying, their response might include some details that fit with the topic but are not in the booklet. While it's helpful to hear about their prior knowledge and attitudes (and sometimes that will be your main goal), it can become hard to judge what they have read and how well they have understood it. If you are trying to check on comprehension and you sense that people are mainly telling you what they already know rather than talking about what's in the written material, try to steer them gently back to the written material.

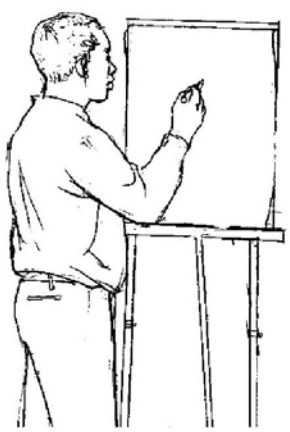
- In paraphrasing what the material is about, people will sometimes identify a concept that's confusing, a word that doesn't work well, or a sentence that makes no sense. If this happens, be sure to probe to get more details about what they found confusing. Depending on the situation and the person you are interviewing, it may be appropriate to ask their opinion about how it should be said instead.

- Often you will want to focus on specific content when you are checking on comprehension. For example, you might want to find out whether people can understand a definition or an example or a diagram. You can use questions such as, *what do these numbers for cholesterol tell you?* Or, *this word can mean different things to different people. What does it mean to you?*

Tips for finding out how well the content meets readers' interests and needs

Content – how well it meets readers' interests and needs

What are common feedback issues for this topic?

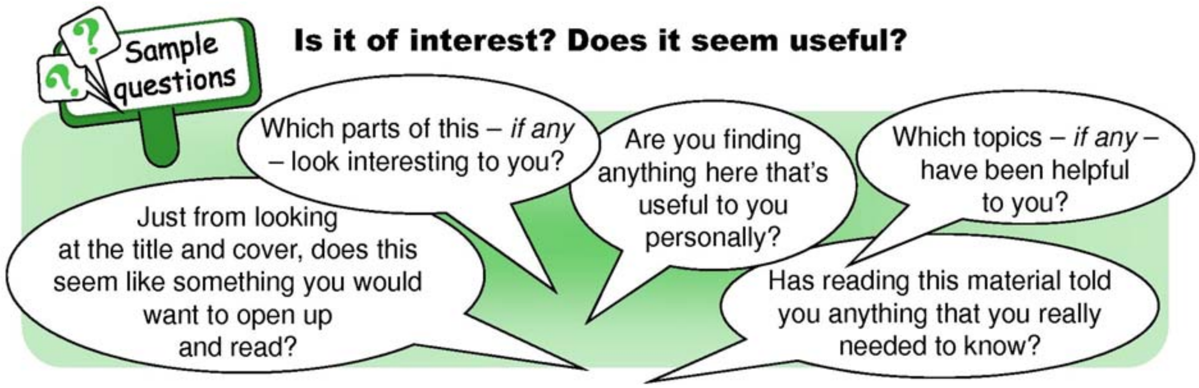


- How much do readers already know about what's covered in the material? How do they feel about the topics? Do they have any misconceptions? Any strong feelings or concerns?
- Does the material meet an information need and seem potentially useful to readers? Do readers care about what it says? Does reading it seem worth the time and effort?
- 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 the things it is asking them to do are realistic and feasible for them to do?

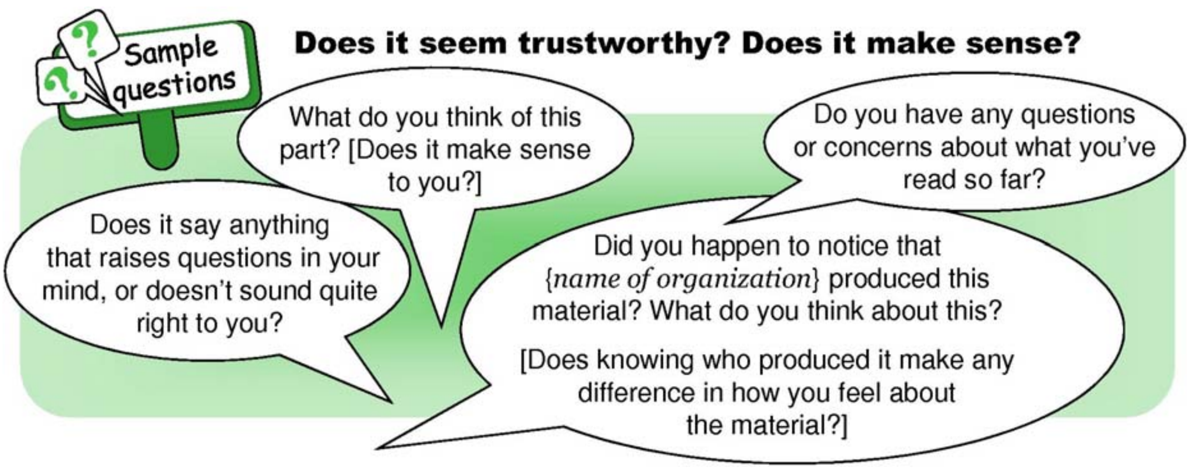
Source: Toolkit Part 6, Chapter 5, Figure 6-5-a.

Reader feedback sessions give you a perfect opportunity to find out directly from readers how well the content of the written material is meeting their interests and needs. To give you ideas about ways to do this, we show some sample questions below.

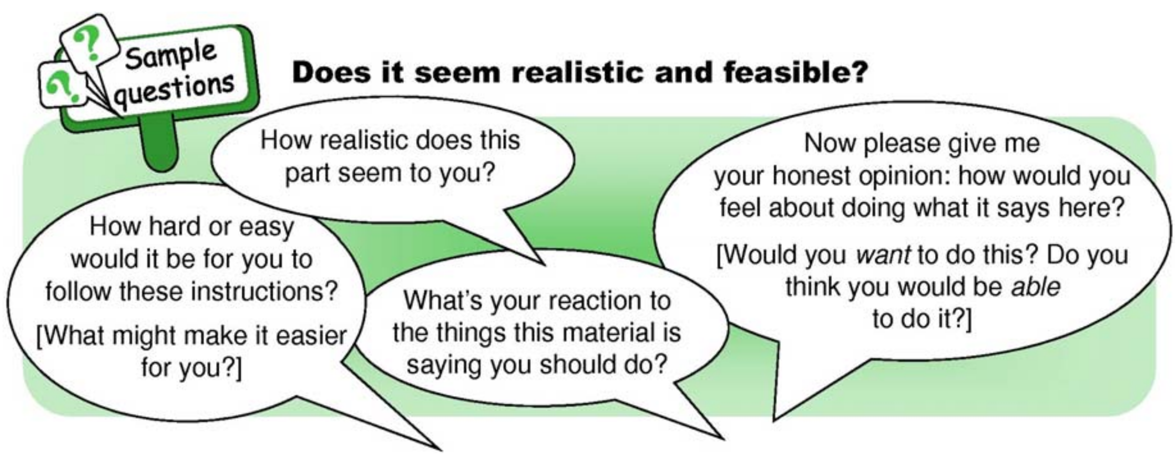
Is it of interest? Does it seem useful?



Does it seem trustworthy? Does it make sense?



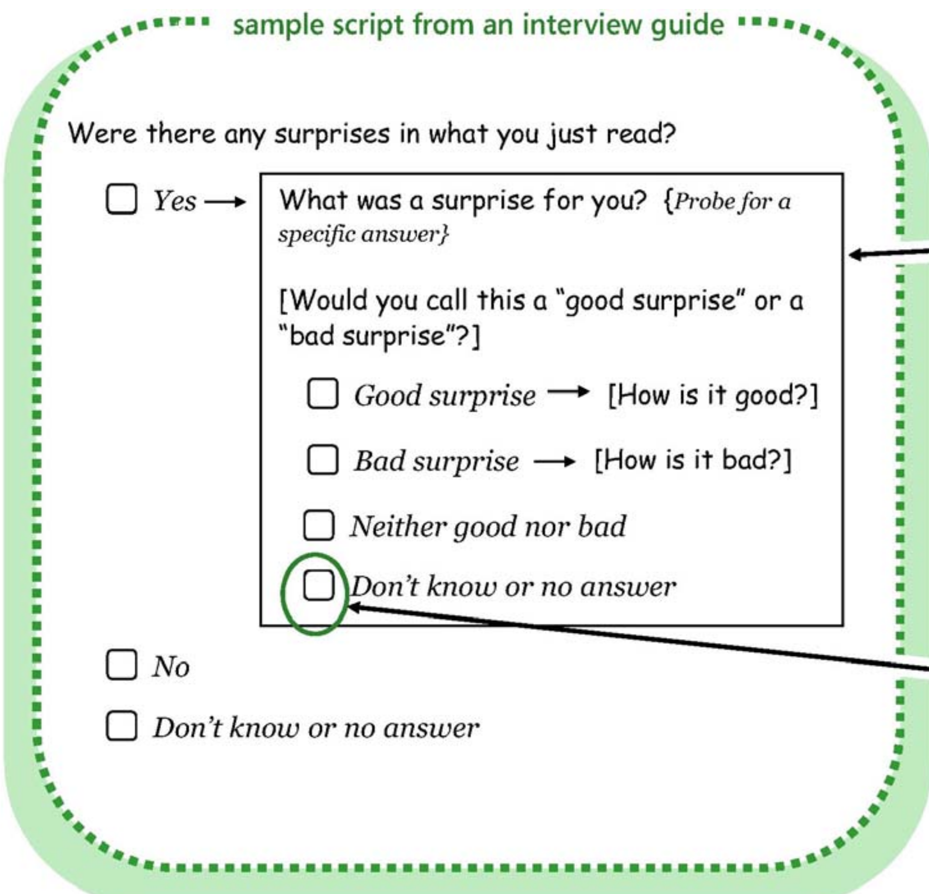
Does it seem realistic and feasible?



Scripted questions from an interview guide

To give you more ideas about ways to check on readers' reactions to content, Figure 6-9-c below has samples of scripted questions from a written interview guide (see Chapter 10, *Creating a written guide for conducting feedback sessions*). The commentary for these scripted questions points out some formatting features that make the written guide easier for interviewers to use in conducting a session. You could adapt these features for questions on other topics, too.

Figure 6-9-c. A sampling of scripted questions you can use to check on readers' reactions to content of the material.



If the person answers "yes," there are several follow-up questions to find out what was surprising and how the person felt about it. The outline box groups these follow-up questions together and makes it easier for the interviewer to follow the script (and skip over them quickly if they don't apply).

Putting check boxes in your interview guide makes it easy to mark the answers. Include boxes for choices such as "don't know" and "no answer," too. And leave some extra space where it's needed, to allow for written notes about what the person says (our examples usually don't include this extra space).

Figure 6-9-c continued.

sample script from an interview guide

Did you learn anything new while you were reading this?

- ☐ *Yes* → What was new? {*Probe for a specific answer*}

  [Please **show me** which parts were about something that's new to you]
- ☐ *No*
- ☐ *Don't know or no answer*

It's often helpful to have the person show you what they are reacting to by pointing to a particular part of the material.

sample script from an interview guide

I'd like your personal opinion -- do you think it's a good idea to include {*insert description of the topic or section of the material, such as "this definition"*} in this material, or do you think it should be dropped?

- ☐ *Should **include** it* → *If needed, probe for reason:*

  [How come?] -or - [Why do you think so?] - or -- [Tell me more about that]
- ☐ *Should **drop** it* → *If needed, probe for reason:*

  [How come?] -or - [Why do you think so?] - or -- [Tell me more about that]
- ☐ *No opinion or don't know*

If the person you are interviewing doesn't give a full answer, there are many different ways to probe for a reason.

Just for illustration, this example shows three possible probes.

Since these three examples of probes are worded in a general way, you can use the same ones whether the person answers "should include it" or "should drop it."

Figure 6-9-c continued.

sample script from an interview guide

Now I'd like your opinion about the amount of information in this material. {*alternate wordings:* in this section / on this page / *etc.*}.

Do you think the amount of information it gives is too much, too little, or about right?

- ☐ *Too much* → Which information do you think should be dropped or left out?
  [Which parts tell you too much, or give you more than you really need to know?]
- ☐ *Too little* → Which parts don't tell you enough?
  [What information should be added to make this better?]
- ☐ *About right*
- ☐ *No opinion / no answer*

Alternate wordings show how you can adapt this question to focus on a specific part of the material, such as a section or a single page.

These follow-up questions are really crucial. They help you get feedback that is specific enough to guide revisions.

sample script from an interview guide

Was there anything you wanted to know about that wasn't included in this material?

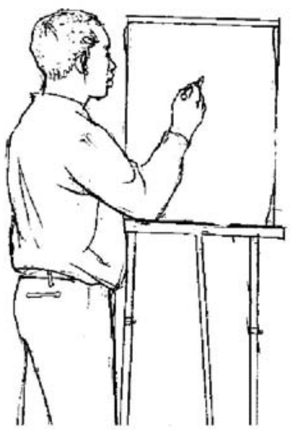
- ☐ *Yes* → [What?] -or--[What were you hoping to find that wasn't there?] {*Probe for a specific answer*}
- ☐ *No*
- ☐ *Don't know or no answer*

Source: Created for this Toolkit.

Tips for assessing usability

Usability (*can* readers use it? Do they think they *would* use it?)

What are common feedback issues for this topic?



Are readers **able** to use the material?

To check on whether readers can use the material, you focus on getting them to apply the information in the material. For example, if it's a pain medication label with dosage information, can they figure out the right amount of medicine to take?

Do readers think they **would** use the material?

Just because readers are *able* to use the information doesn't mean that they necessarily *would* use it. So it's also helpful to seek readers' feedback on anticipated use. For example, you could ask questions such as these:

- 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?

Source: Toolkit Part 6, Chapter 5, Figure 6-5-a.

Just because readers can understand the written material does not automatically mean that they can use it for its intended purpose. So when you do feedback sessions with readers, it's vital to check on usability.

Using tasks to assess usability and comprehension

Giving readers a task to do can be very helpful in assessing usability and ease of understanding. For example, if the material you are testing has numerical information or a chart with comparative information, you can devise a task that involves using the numbers or the chart. Here are two examples:

- Suppose that the material is about reading nutrition labels on packaged foods, and it includes an illustration. You can ask questions to find out whether the participant is able to understand and use the information on the label. For example, you could say, *Suppose that you ate two servings of this soup. How much salt (sodium) would you be eating in those two servings?* To come up with the right answer, the person would have to multiply the per-serving amount listed on the label by two.

- Suppose that the material has a rows-and-columns chart that compares a group of health plans based on results from surveys of patients. You could ask questions that require them to refer to the chart and use the information in it to reach an answer. For example, you could ask, *according to this chart, which health plan did the best on quality of customer service?*

When you use a task to check on usability and comprehension, there is often a "right" answer, as there is in the examples we just gave. If you ask about how much salt is in two servings of soup, there's a right answer, and if you ask which health plan did best on customer service there is a right answer. So if the participant gives a *wrong* answer, you will want to follow up to find out how the person arrived at that answer. Finding out more about how the person arrived at that wrong answer provides valuable feedback about possible problems in the text or display of numbers or symbols.

While it's obvious that you would want to follow up on any wrong answers you get, **this Toolkit urges you to follow up on *all* answers – whether they are "right" or "wrong**." The two examples in Figure 6-9-d below explain why.

Figure 6-9-d. Why probing is crucial when you give people a task to perform (they can give the "right" answer for the "wrong" reason, and vice versa).

Background on the charts and tasks

The two examples below are from projects done by the Toolkit writer.

- In each example, the material we tested was a rows-and-columns chart with symbols showing how well health plans scored on results from a consumer survey.

- In each project, we did individual interviews to find out how easy it would for people to use the information in the chart. We tested a draft version of the chart that had fictional names for the health plans and fictional results from the survey. Since the charts were for different projects, they used different symbols and contained different information.

- We arranged the symbols in the chart into a pattern and then made up questions to ask that would have a single right answer, based on that pattern. During the interview, we planned to show the chart, describe a situation, and then ask the participant to choose the best plan for that situation. When the person answered, we would then follow up by asking how he or she decided that was the best plan to choose.

As you'll see below, there were some surprises. When we set up the patterns, we didn't anticipate all of the possibilities. Both of these examples show how crucial it is to probe for reasons when you give people a task to perform – *no matter what answer they give*.

"Comfort Care" example — **It's possible to give a "correct" answer without understanding how to use the chart**

When we made up the names for the health plans in the comparison chart for this project, we wanted names that wouldn't sound like real health plans in the area. We considered labeling them as "Health Plan A," "Health Plan B," and so on, but we knew from another study that a few people had been confused by a chart that used this generic alphabetical approach to naming of fictional health plans. So we decided to make up names that all sounded positive. The list included names such as "QualiCare," "Secure Care," and "Comfort Care." According to the pattern of symbols we had built into the chart, the plan that was doing the best overall on all of the topics was "Comfort Care."

When asked to name the plan that was doing the best overall, one woman responded "Comfort Care." When we asked to explain how she had decided on Comfort Care, she replied, "I figured it was the best because I like that name the best. Comfort Care sounds like it would be really good -- nice and comfortable." Further questioning revealed that she did not really grasp the concept of the performance measures shown in the chart. Moreover, she could not comprehend how to extract information from the chart by looking at the intersection of a row and column.

This interview showed us how people can attach connotations to fictional names you invent. In the next group of interviews, the chart was revised and we used the names of trees ("Pine Health Plan," "Maple Health Plan"). Even then, we pre-tested the names separately to see if people had preferences that might influence reactions to our chart. Based on pre-testing results, we eliminated "Oak Health Plan" because somebody said it sounded stronger and sturdier than the others.

"Lisa vignette"

It's possible to be adept at using the chart but not give the "correct" answer

In this project, we were doing feedback sessions with women to test a draft Medicaid report. The report had two comparison charts, one for survey results about adults' care, and the other with survey results about children's care. Both charts had results for seven survey topics.

At that time, the Medicaid program required mothers and children to enroll in the same health plan. Since mothers had to choose the same health plan for themselves and their children, we needed to find out whether mothers would be able to use the comparison chart for adults' care in combination with the comparison chart for children's care when they were making their choice.

To get reactions to the two comparison charts and explore how people might use them in decision making, we did individual interviews with young women who were enrolled in the Medicaid program. To participate in our feedback sessions, they needed to have at least one child who was also covered by Medicaid.

One goal of the feedback sessions was to find out whether a woman could use both charts in combination to select the best performing health plan for herself and her children, *based on results for the survey topics she felt were most important*. To find out, we created a fictional situation featuring a mother named Lisa who needed to use the summary charts of survey results to choose a health plan for herself and her children. This "Lisa vignette" identified easy access to specialty care as a priority for the children, and finding a doctor who communicated well as a priority for Lisa's own care. The interviewer explained the vignette and then gave the participant a card. This card summarized the Lisa vignette for easy reference while using the chart.

We created a pattern of survey results for both of the charts such that there was an answer we considered to be "correct." This correct answer was "Western Health Plan." It was the only health plan that met both criteria of being (a) high scoring on doctor's communication skills for the adults' care chart and (b) high scoring on access to specialty care for the children's care chart.

We showed the comparison charts and explained the Lisa vignette to one of the feedback session participants. She chose Riverside Health Plan – a "wrong" answer. Riverside Health Plan scored well on children's care: it scored high on access to specialty care (one of our criteria) and in fact, scored best overall for children's care. However, on the adults' care chart, it scored low on doctor's communication skills and therefore did not meet our other criteria.

We asked the participant how she had decided that Riverside would be the best choice for Lisa. As she explained her reasoning and showed where she had looked at information within each chart, it became clear that the participant was adept at understanding and using the information in both charts. She had understood that she was supposed to use the two charts in combination, but once she saw the results in each chart, she deliberately disregarded the instructions about Lisa's priorities: In her view, children's care was the most important consideration, and Riverside was clearly the best plan for children. She felt that Lisa should pick the health plan that is best overall for her children, and join that one herself, since children's care is most important. Several other women in the feedback sessions chose Riverside Health Plan rather than Western Health Plan, for much the same reasons.

This example of the Lisa vignette illustrates how people can come up with a "wrong answer" that is based on sound logic and reflects solid understanding of the chart and how to use it.

Conclusions

Both examples show how it can be hard to anticipate people's reactions to a task. Instead of treating people's answers at face value as demonstrating either confusion or comprehension, it's crucial to probe for their accounts of how they reached their answer. It is through these accounts that you will learn how well the document is working and how it could be improved.

Source: These examples are based on interviews the Toolkit writer conducted in projects for clients. They are adapted for use in this Toolkit.

End notes

References cited in this chapter

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