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 11

Creating and using a "Session Summary Form"

TOOLKIT Part 6, Chapter 11

Creating and using a "Session Summary Form"

List of figures in this chapter:

This document is the eleventh 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).

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 11: Creating and using a "Session Summary Form"   153

What is a Session Summary Form?

A "Session Summary Form" is this Toolkit's name for a simple form that interviewers and note takers can use to review and summarize the results from each feedback session they conduct. This form doesn't replace the need to take notes during the session (see Chapter 17, *Conducting feedback sessions and taking notes*). Rather, it is a supplement to the note taking you do during the session.

Here is how it works to use a Session Summary Form:

- **You prepare the form ahead of time**. We show a sample Session Summary Form below in Figure 6-11-a. You can adapt this form or create one of your own.

- **Immediately after each interview, you fill it out**. At the end of the interview, after the participant leaves the room, the interviewer takes a few minutes to look over the notes he or she has taken during the session, filling in any places that are incomplete. Then the interviewer fills out the Session Summary Form.

   o   As you will see in the sample form that follows, the Session Summary Form gives you places to fill in descriptive information (time, place, participant characteristics, etc.), highlights from the session, and your personal assessment of the interview.

   o   If the interviews are being done by a two-person team of interviewer and note taker, then they discuss the interview and work together on filling out the form.

Figure   6-11-a. A sample Session Summary Form.

To help you imagine how a Session Summary Form can be customized to fit the needs of a project, the sample form we show below has been set up for use in a fictional Arthritis Booklet Project. It's a three-page form. Most parts of this sample form would apply to any project, but a few are specific to this Arthritis Booklet Project.

Keep in mind that the normal size of the pages in this sample form is 8 ½ by 11 inches. To fit on the pages of this Toolkit, we show the sample Session Summary Form slightly reduced in size.

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 11: Creating and using a "Session Summary Form"   154

Arthritis Booklet Project
Session Summary Form

interview # _____

When & where

Started: _____ Ended: _____ Total mins. = _____

Location:
☐ Harborview Senior Center
☐ Pelican Marsh Senior Center

Interviewer _____   Notetaker _____

Observers _____

How were conditions for this interview?
(privacy, background noise, distractions, etc.)
☐ Good
☐ Okay   *comments*: _____
☐ Not good   _____

Participant

☐ Male   ☐ < 60   ☐ < 9th grade
☐ Female   ☐ 60-64   ☐ Some H.S.
            ☐ 65-69   ☐ H.S grad / GED
            ☐ 70-74   ☐ Some college
            ☐ 75 +   ☐ College degree+

How physically active is the participant?
☐ Very little or no stretching and/or exercise
☐ Some stretching and/or exercise
☐ Regular stretching and/or exercise

comments: _____
_____

General impressions of this interview

General comments from interviewer and notetaker: _____

_____

How attentive was the participant during the interview?
☐ Very attentive
☐ Somewhat attentive
☐ Not very attentive

How interested did the person seem to be in the booklet?
☐ Very interested
☐ Somewhat interested
☐ Not very interested

How well did the person seem to understand the booklet?
☐ Very well (*most or all of it*)
☐ Fairly well (*most or all*)
☐ Not very well (*had trouble with some parts of it*)
☐ Not well at all (*had a lot of trouble understanding it*)

Participant behavior (*mark all that apply*):
☐ Asked questions
☐ Seemed comfortable about giving opinions
☐ Seemed to hold back in giving opinions
☐ Wanted direction or confirmation from interviewer

☐ Tended to read carefully
☐ Did not seem to be reading very carefully
☐ Tended to skip around
☐ Had trouble concentrating
☐ Got tired quickly

Other behavior:
_____
_____
_____
_____

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 11: Creating and using a "Session Summary Form"   155

interview # _____   page 2

Positive feedback:

☐ Booklet in general *(including general appeal, personal relevance):* _____

_____

☐ Specific terms, concepts, or topics: _____

_____

☐ Visual elements *(graphic design, colors, images, etc.):* _____

_____

☐ Content / key messages: _____

_____

☐ Other: _____

Problems – confusion – misunderstandings – dislikes – criticisms:

☐ Booklet in general *(including general appeal, personal relevance):* _____

_____

☐ Specific terms, concepts, or topics: _____

_____

☐ Visual elements *(graphic design, colors, images, etc.):* _____

_____

☐ Content / key messages: _____

_____

☐ Other: _____

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 11: Creating and using a "Session Summary Form"   156

interview # _____   page 3

Brief summary of feedback on key issues

First impressions of the booklet:

_____

_____

_____

In paricipant's own words: what the booklet is
telling them / main points:

_____

_____

_____

In participant's own words: what is
"appropriate exercise" for people with arthritis:

_____

_____

_____

Does the participant plan to do anything
different as a result of reading this booklet?

☐ Yes

☐ Maybe or
   not sure

☐ No or
   probably not

Comments:

_____

_____

Photo preference for the cover:

☐ Photo A   ☐ Likes A & B the same

☐ Photo B   ☐ Doesn't like either one

              ☐ Other: _____

Results of photo sort for inside pages *(fill in numbers
to show rank order, cross out the ones they rejected):*

_____ Photo C   _____ Photo G

_____ Photo D   _____ Photo H

_____ Photo E   _____ Photo I

_____ Photo F

Comments on interview guide and procedures

Overall, how well did the interview questions
and procedures work for you in this session?

☐ Very well

☐ Fairly well

☐ Not very well

Did you have enough time to cover all main
parts of the interview guide in this session?

☐ Yes

☐ No – but only because this interview was
    shorter than usual

☐ No – our guide is too long for the usual
    amount of time we have available

Questions we should consider changing or dropping:

_____

_____

Other comments on interview questions, topics, or
procedures:

_____

_____

_____

_____

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 11: Creating and using a "Session Summary Form"   157

Source: This sample form (and the name for it – "Session Summary Form") has been created for use in this Toolkit. It is an adaptation of forms the Toolkit writer has used in various reader feedback projects. The Arthritis Project is a fictional project created to serve as a recurring example in this Toolkit.

Why use a Session Summary Form?

There are three big benefits to using a Session Summary Form:

1 Filling out the form gives interviewers and note takers a quick and easy way to do a thorough job of taking notes from the session

It makes sense to take a few minutes after each session to review and summarize notes, but – where to start? This form can help. It provides a systematic way to guide you through the most important aspects of the interview, and makes it quick and easy to record your impressions while they are still fresh in your mind. It also includes places to fill in the key information you will need later on for reference, such as the participant's characteristics, where the interview was done, how long it lasted, etc.

Interviewing is hard work, but this form can make it easier to do a good job of recording the results from your sessions. If you are new to conducting feedback sessions, using this form will help structure your note taking. If you are experienced, it can help streamline your work.

2 Filling out the form gives interviewers and note takers a chance to reflect on what they learned and share their first-hand impressions

This act of filling out the Session Summary Form is the beginning of data analysis. *During* the session, note taking consists of describing as accurately as possible what the person says and does. But *after* the session is over, filling out a Session Summary Form requires the interviewer and note taker to go beyond just describing what the person said or did. The Summary Form asks for themes and highlights from the interview. To identify these, you need to reflect back on the interview and decide what stood out as really important and what it meant.

It's important to make it easy for interviewers and note takers to share their own interpretations of the findings from the interview and to add any explanatory notes that will

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 11: Creating and using a "Session Summary Form"   158

help people put the findings into context. They are the ones who were there in person with the participant. By filling out the Session Summary Form, they can share their first-hand impressions and interpretations with others on the team who were not there in person but will be using the results.

3 Having a completed Summary Form for each session provides a giant head start for those who will be analyzing and using the results

When you are ready to start interpreting and applying what you have learned in your feedback sessions, having a completed Session Summary Form for each interview will make the task much quicker and easier. You can use the feedback forms together with the notes that were taken during the session. If you did audio or video recording of the sessions, you can use those recordings as well (see Chapter 12, *Should you do audio or video recording of your sessions?*)

Having a full set of summary forms, in addition to whatever session notes and recordings you may have, offers several advantages:

- The summary sheets help refresh your memory about the circumstances and highlights of each interview.

- Depending on how you set up your form, and what you are doing during the session, the summary form can provide a short cut for tallying some of your results across all sessions.

- If you want to share the results with others, especially with people who were not involved in planning or conducting the feedback sessions, the summary forms are ideal. They are more convenient, more complete, and more self-explanatory than notes taken during the session. The summary forms give people a quick overview with enough detail to be vivid, and they are organized for easy skimming. Since interviewers and note takers fill them out after the session is over, the handwriting tends to be more legible than notes taken in haste during the session.

- If you want to, you can type part or all of the entries on these forms into electronic files for easier sharing and analysis. You could also create an electronic version of the form and then interviewers and note takers could fill it out by using a laptop computer.

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 11: Creating and using a "Session Summary Form"   159

Page-by-page commentary on the sample form

To conclude this chapter, Figure 6-11-b below provides a page-by-page commentary on the sample Session Summary Form we showed earlier in this chapter. This commentary points out certain features of the form, explaining why they are there and how they can help you.

Figure 6-11-b. Page-by-page commentary on the sample Session Summary Form.

Answer formats make it quick and easy to fill out this page immediately after the interview. Most questions on this page have a check box format, and few have blanks to fill in.

To protect privacy, this form uses only an interview number (no names). A place for the interview number is repeated on each page.

Prominent main headings throughout the form make it easier to fill out and easier to use after it has been filled out.

For easy reference, this top part is set up to describe the participant and the interview (when, where, how long it lasted).

You can adapt your form to include **a handy place to record answers to questions you ask before you show the material** to the participant. Here's an example based on the Arthritis Booklet Project.

A context for interpreting the results. This bottom part asks for impressions of the participant. Knowing how attentive and interested participants appeared and how well they seemed to understand the material can help you interpreting their reactions.

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 11: Creating and using a "Session Summary Form"   160

Figure 6-11-b, continued.

Using this page to summarize highlights from each session gives you a **big head start on organizing and using your results.**

Keeping the highlights on just one page makes this summary easier to use later on.
If the interviewer and note taker happen to need more space, they can continue on the back side.

Keeping two types of feedback clearly separate lets you see at a glance what's going on and helps you make comparisons.

The four main areas of feedback at the top of this form are repeated on the bottom. It's only the headings that are different:

All of the **positive feedback** is summarized at the top.

All **feedback indicating possible problems** is summarized at the bottom.

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 11: Creating and using a "Session Summary Form"   161

Figure 6-11-b, continued.

A place to summarize answers to key questions. This top area has been set up in advance as a place to write down how the participant responded to three key questions included in the interview. When you start to analyze the results from your feedback sessions, it's very convenient to have these responses so readily available.

Check boxes make it easy to record and tally the results. This area has check boxes to record the participant's answers to the question on impact of reading the booklet, as well as preferences for the photos. Using check boxes here on the form makes it easy for you to tally the responses across all of your feedback sessions.

A place to evaluate the session. This last section provides a place for the interviewer and note taker to evaluate how well the session went and whether there was time to cover everything. It has space where the interviewer and note taker can tell about any changes they think are needed in the interview guide or in the procedures.

Source: Commentary written for use in this Toolkit.

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 11: Creating and using a "Session Summary Form"

To view, save, or print all or parts of this
Toolkit from your personal computer,
visit http://www.cms.gov and select
Outreach & Education.

CMS Product No. 11476

September 2010