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 17

Conducting feedback interviews and taking notes

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

TOOLKIT Part 6, Chapter 17

Conducting feedback interviews and taking notes

List of figures in this chapter:

This document is the seventeenth 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 day when you will conduct your feedback sessions has arrived. Preceding chapters have helped you make the decisions and complete the tasks that led up to this day.

The written material is ready to test, your written interview guide is ready to use, you've chosen your site and made the arrangements. Interviewers and note takers are set to begin. If you recruited in advance, participants will be coming in for their appointments. If you plan to recruit on site, all the arrangements have been made.

Now, in this chapter, we offer general tips for making things go smoothly when you are conducting your feedback interviews and give practical advice about taking notes.

Handling the interaction with readers is the major task of conducting your feedback sessions. This is a big topic, and we cover it separately in the next chapter (Chapter 18, *Tips for effective interviewing technique*).

[This chapter on conducting feedback sessions and taking notes is about interview sessions only. If you are using focus groups to collect feedback from readers, some of the discussion in this chapter will be applicable. But for in-depth discussion of how to conduct focus groups, see Krueger and Casey (2000) and Morgan and Krueger (1998) referenced in Chapter 6, *Should you do individual interviews or focus groups?*]

Tips for making things go smoothly

Since the specifics of conducting your feedback sessions differ greatly depending on the site you've chosen and how you are recruiting participants, we cover only a few general points:

- **Be sure to have a workable schedule that includes breaks between interviews and time off for meals.** Interviewing is demanding work. You need time immediately after each interview to review and expand on your notes, and you also need an occasional break. Flexibility is also important because an interview will sometimes run overtime (always ask to be sure the person doesn't mind continuing past the ending time).

    - If you are setting appointments for interviews, be sure that the recruiters have set up a workable schedule with some time off between each interview. You need this time to go over your notes, and you also need it to give flexibility in case people arrive late for their appointment.

    - If you are recruiting on site, your schedule is flexible because you have direct control over when you start recruiting for the next person to interview. Of course, there's no guarantee that when you are ready for the next person, the next person will be ready for you. In some settings, the number of people on the premises can fluctuate considerably depending on day of week or time of day. When you make your arrangements to use a site, ask about the busy times. If you can be there when it's busy, it will be easier to recruit a steady flow of participants.

- **Get there early.** Allow time to find a place to park, carry in your materials, greet staff at the site, and get organized for doing interviews. You may need some extra time to rearrange furniture in your interviewing room, test your equipment, and confer with your interviewing partner (if you have one).

- **Make sure to bring everything you need.** At a minimum, you'll need copies of the interview guide (see Chapter 10), copies of the written material, Session Summary Forms (see Chapter 11), material for taking notes during the sessions, and your paperwork related to the appointment schedule or arrangements at the site. You might also need to bring informed consent or permission forms and receipts to acknowledge payment for participation. If you will be recording the session (see Chapter 12), you will need to bring all of your recording equipment (unless you are using a facility that provides this equipment). Bring extras of such things as extension cords, batteries, and tapes. You might want to make up a checklist to help you remember everything you need to bring.

- **If you are doing your interviews in a community setting, make sure that people who work at the setting know why you are there and that you have permission**. If staff members don't know who you are and what you are doing, there can be misunderstandings. In some settings, they will give you a badge to wear.

- **Observers**. Sometimes, people who are involved in the development of the material sit in on sessions with readers. Typically, they find this experience extremely interesting and helpful. It is powerful to be right there to watch and listen as readers react to the material. If you are considering having observers, there are issues to consider, and we discuss them in Chapter 2, which covers steps in planning your session. If you do have observers at your session, talk with them before you begin your interviews to be sure that they understand their role and agree to remain silent during the sessions. Be sure that observers understand how it will affect the quality of the data if they distract participants. Identify them as observers at the beginning. Keep it brief; it's enough just to say they are part of the project and are there to observe.

Taking notes during the session

It's 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. Often these notes will be your only record of the feedback you get, especially if you are doing individual interviews.

Sometimes you may choose to do audio or video recording of sessions, especially if you are doing focus groups rather than interviews. If you record your sessions, you won't need to take such detailed notes, but it's still wise to take at least a few. Recording sessions has both advantages and disadvantages. Having a recording makes it easy (though time consuming) to go back over your sessions or share them with others. Recordings can be great training tools. But as ways of capturing how readers react to written material, recording the interaction has some significant limitations. Even if you have recorded video as well as audio, it can be hard to know what the person was looking at when they made a particular comment. For more on this, see Chapter 12, *Should you do audio or video recording of your sessions?*

Who is taking the notes?

There are two main ways to handle note taking during an interview:

- **One way is to have the interviewer take the notes, in addition to conducting the interview.** This can be challenging, especially for beginners. It's hard to split effort between leading the interview and taking the notes.

- **The other way, pictured below, is to use a two person team.** One takes the lead on conducting the interview and the other is the primary note taker. For most situations, this is the approach we recommend.

When you work with a colleague, you can focus either on conducting the session or on taking the notes. **Teamwork allows each person to concentrate more fully on a single task.** Interviewers can stay more attentive to the reader, and note takers can keep a more complete and detailed record of the session.

The interviewer generally takes a few notes from time to time, and the note taker may ask some questions as well. They can trade off on these tasks if they like. If you happen to be using a professional focus group facility for your sessions, you can have one or more note takers working in the observation room, behind a one way mirror.

Working together makes doing feedback sessions easier for both of you, and it tends to produce better results. Taking the team approach to conducting feedback sessions gives you a partner to compare impressions with when the session is over. You can discuss what you learned from the reader during the session. The team approach is also ideal for training. You can give each other encouragement and support as well as tips to help improve your skills.

Explaining to participants why you are taking notes

When you begin the interview, you will want to give a brief explanation about why you are going to be taking notes during the session. If you are recording the session, you will also want to confirm that the participant is willing to be recorded. If you plan to record the sessions, you need to say so when you are recruiting. Even so, it's important to discuss recording with the participant before you begin, and complete the appropriate paperwork such as consent forms. Below is an example of how you might handle the explanation of note taking and recording.

sample script from an interview guide

INTERVIEWER: Explain about taking notes and taping:

While you're reading and commenting on this material, I'll be taking some notes to help me remember what you say.

I won't have time to write everything down, so, if it's okay with you, I would also like to tape this interview. That way, I can listen to it later.

I might share this recording, but only with other people who are working on this project. We would keep it confidential, and your last name would never be used.

If taping this interview is okay with you, please sign here to give me your permission.

INTERVIEWER: Have participant sign the release form.

What do you write down in the notes?

When you are taking notes during a feedback session, **most of your notes will be purely descriptive**. Your notes record the highlights of what happens during the session. Many of your notes will tell what participants say. This includes their spontaneous comments as well as the answers they give to questions you ask. Other notes tell what participants do with the material. This includes notes on behaviors you observe, such as which parts of the material they look at and how long they spend on different parts of the material.

Although most of your notes will describe what the participants say and do, occasionally you might jot down your personal impressions. Sometimes, instead of just describing what participants have said or done, you will make notes that reflect your own assessment about what was said or done. For example, you might write a general comment such as, *Seems to be having trouble reading that part*. If you are the interviewer, you might write down notes that serve as reminders, such as making a note of a follow-up question you want to ask.

How can you make note taking more efficient and effective?

Don't worry about trying to take comprehensive or detailed notes during your feedback sessions, because it's just not physically or mentally possible. You will need to be selective about what you write down (especially if you are both interviewer and note taker). You'll also need to be flexible, because people don't give their feedback in an organized way.

It's okay to ask a participant to repeat something they have just said. By asking them to repeat it, you show that you are treating what they say as important. It's also okay to take a little time to pause and write your notes. People are generally patient.

Here are some tips on ways to make it easier to take good notes:

- **Take care in where you sit and how you hold your note taking materials.** Give yourself a clear view of the person and the written material, and try to keep the notes from becoming a physical barrier between you and the participant. Try not to lose eye contact because you get so engrossed in taking notes.

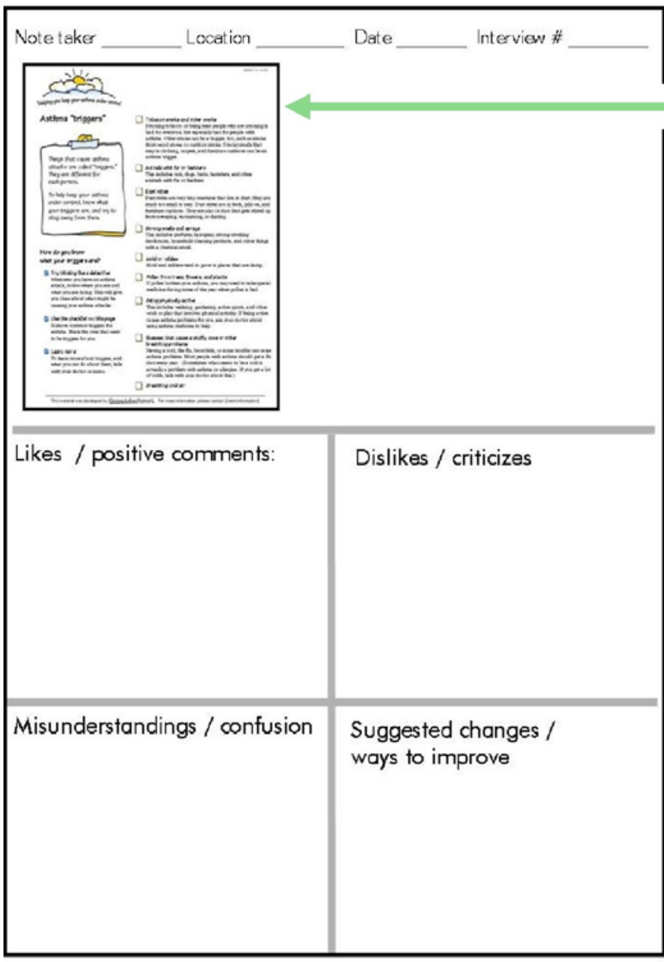
- **Find your own style or way of taking notes that works best for you**. Usually, the note taker will have a copy of the written interview guide that has been adapted for use in taking notes. There are two main options: leave extra space for note taking under each question, or print the guide with an extra wide margin for taking notes. Choose the way you prefer. Some people who are left-handed like to print the note taking version of the guide with an extra-wide margin on the left side. Some people like clipboards, and others don't. When they are writing notes in haste, some people like pencils, some like pens. Some like the pages stapled together, others want them clipped. You may need to experiment a bit to discover what works best for you.

- **Focus on jotting down key phrases that capture the main points.** Remember, you will be taking some time right after the interview to make additions and corrections to your notes. The key phrases will jog your memory.

- **Figure out some good abbreviations to use as shortcuts for note taking.** Setting up some simple abbreviations will help streamline your note taking. Many note takers use the letter *R* for *respondent* to refer to the feedback participant. You can use the letter *P* for *probe* to mark answers that were given in response to an interviewer's probe. Think about the subject matter of the material and invent some abbreviations for the words that might come up frequently in your note taking. For example, if the material is about diabetes and exercise, you could use the letter *D* for *diabetes* and *E* for *exercise.* Work with your interviewing partners to devise some note taking shortcuts of this type. And then later, when you go over your notes, you can fill in the places where you did shortcut abbreviations that are not going to be self explanatory to others who will see your notes.

- **Prepare and use special forms to expedite note taking**. Figure 6-17-a below shows an example of a form we call the "mini-page note taking sheet."

Figure 6-17-a. Example of a mini-page note taking sheet.



These **blanks at the top** make it quick and easy to label your notes

To make note taking more efficient, include a **reduced-size version of the written material** on your note taking sheet. We call this a "mini-page."

- Write your notes in the blank area to the right of the mini-page.
- To link your notes to a particular part of the mini-page, you can use arrows or you can circle parts of the mini-page and draw lines back to your written notes.

Dividing the note taking page into **sections** like these four sections helps you **categorize and label the type of feedback** you are getting *as you take your notes.*

- Putting notes under headings **speeds up note taking**.
- Putting notes under headings also **reduces ambiguity.** Later, when you are using your notes to analyze the feedback you got, you will know for sure whether a comment was positive or negative.

Source: This example shows a note taking sheet that was used by the Toolkit writer and her partner, Mark Evers (McGee & Evers Consulting, Inc.), in a project for the State of Oregon. The mini-page is an early version of a piece on asthma triggers. The piece was revised based on results from testing and is now part of the Oregon Asthma Resource Bank at http://www.oregon.gov/DHS/ph/asthma/resourcebank. The note taking sheet is used in this Toolkit with permission from the State of Oregon; commentary added by the writer.

The mini-pages note taking sheet is a helpful, versatile tool for note taking. It works well for recording what people say and do during a period of *think aloud* and making notes about their reactions to photos and other visual elements. Mini-pages note sheets also work well for capturing a sequence of navigation through the material. For example, suppose that you want to keep track of which part of the material the person looked at first, second, third, and so on, together with comments they made about each part. To record this sequence, you can write a number right on top of the mini page to mark the spot where they looked. If there's a comment, you can write the comment down below the picture, and link it to the number with a line.

It's easy to make a mini-page note taking sheet for your own project:

- **Start by doing the basic layout of the form**, leaving a place where you can insert each mini-page. Figure 6-17-a above gives one example of a simple layout. You can create one of your own to suit the needs of your project and the written material.

- **Insert the mini pages into the form**. You can do this mechanically, by photocopying each page in reduced size, and then cutting and pasting it onto the form. Or, if you have the skills, you can create an electronic version by scanning or other means.

What to do when the session is over

Review and expand on your written notes

When the session is over, take a few minutes to go over your notes. It's best to do this right away, while the interview is still fresh in your mind.

- **Make corrections.** When you're writing notes in a hurry, it's easy to make mistakes. When you finish a session, it's crucial to look over your notes and make any corrections that are needed.

- **Make additions**. Also, take the time to expand on the notes you just took. This includes spelling out abbreviations and filling in places where notes are incomplete. You'll probably find many places where the notes trail off because you couldn't keep up with the pace of the interview. When you are reviewing and improving on your notes, try using a pen that writes in a different color. This will show what you wrote down during the session and what you added later on.

It's worth the effort to review and improve on your notes. When notes are clear and complete, it's easier to analyze the feedback from your sessions and use it to improve the written material. Check to see that all of the paperwork related to a particular interview has been labeled with an identification number so that you can keep it grouped together without using people's names.

Fill out a "Session Summary Form"

A "Session Summary Form" is this Toolkit's name for a simple form that you can use to summarize the results from each feedback session (see Chapter 11, *Creating and using a Session Summary Form*). You use this form to supplement the notes that are taken during the session. You prepare the form ahead of time, adapting it to meet the needs of your feedback sessions. There's an example of a Session Summary Form in Chapter 11.

A Session Summary Form gives you a quick and easy way to describe the participant, how the session went, and consolidate the highlights of your results in an organized way. When you are filling it out, you draw on the notes taken during the session and you add your impressions and interpretations. Using the Session Summary Form in addition to regular note taking gives you a more thorough written record of your results. Having a completed Session Summary Form for each session provides a giant head start for those who will be analyzing and using the results from the feedback sessions. The structure of the form makes it easy to skim the key points from each session and to compare results across sessions.

If you are working with a partner to conduct feedback sessions and take notes, you can work together on filling out the Session Summary Form. Filling it out together gives you a chance to compare your impressions and interpretations and reflect on what you have learned (researchers call this "debriefing"). Before you start discussing a feedback session, make sure there's enough privacy. You don't want to talk about a participant or interview where anyone might overhear you.

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CMS Product No. 11476

September 2010

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