Small-Scale Testing

Fast, easy, free ways to test health messages and materials

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NOTE: This guide is useful for all public health practitioners. However, CDC/ATSDR developed it for federal employees, contractors, and grantees looking for small-scale testing options that don't invoke the Paperwork Reduction Act (PRA). Testing messages with people is a type of information collection, and PRA aims to reduce the burden placed on the public when the government collects information. The Act generally requires a federal agency to get approval when using identical questions with 10 or more people in a 12-month period. Learn more about PRA at Digital.gov. If you work for a federal agency, check with your PRA point of contact before you do any testing. If a federal agency is funding your program, check with your agency project officer before doing any testing.

Introduction

When it comes to understanding your material, your readers are the experts. They can tell you whether your materials are easy to understand, use, and remember. You don't need a lot of time, money, or training to test your materials. You have options, and this guide helps you decide what might work for you. This guide describes five types of audience tests to get feedback on your materials from others and a few checklist-style tests for you to evaluate your own materials.

Type of Test	Description	Time
Paraphrase Test	This test will tell you what readers think of your material and if they interpret your messages as you intended. It's best for short documents, web content, and talking points.	1 – 3 days
In-Depth Interviews	This is an open-ended method to gather feedback and explore perspectives about a specific message or material during individual interviews.	2 – 4 days
Focus Group	Focus groups assemble a small group of participants for a guided discussion during which they provide feedback about the messages or materials you are testing.	1 – 3 days
Survey	Surveys help you gather data by asking a sample of people the same questions to see what most of them think about your messages or material.	1 week+
Comparative Tests	Comparative tests compare different materials to determine which performs best or is preferred by your intended audience.	1 – 3 days
Other Tests	See this section for information about checklist-style tests (e.g., Clear Communication Index, Clear Writing Assessment, Health Communication Message Review Tool).	1 day

Test Early and Often

Although this guide focuses on specific methods to test a draft of your materials, you don't have to wait for the draft to get valuable feedback. Get some input during development stages too:

- **At the very beginning**: Talk to people in your intended audience to get a sense of what they already know about your topic, how they feel about it, and what they want or need to know.
- **When you have key messages**: Show participants your key messages (in bullets) and get their reactions. This helps figure out if your messages are clear and actionable.
- **When you have a draft**: Use one or more of the testing methods in this guide to find out if your material is easy to read and use. Revise based on test results. Re-test and revise again if you have time.

Find the Right Testers

It's best to test with people who are as similar to your intended audience as possible, but keep in mind any testing is better than none. Try to find participants who aren't familiar with your material or subject matter — like a colleague who works in a different department or a friend or family member.

Testing with even 1 or 2 people can give you plenty of useful information but aim for 3 to 9 participants for small-scale testing of your material.

Here are some tips on how to find volunteers to test your materials:

- Talk to partners, grantees, and local organizations about helping to test.
- Ask colleagues or find other professionals at conferences or events.
- Create a testing club at work where you agree to test each other's materials periodically or regularly.

Make it easy for people to volunteer. Test online or over the phone, if possible. Or find a convenient testing location that's free, like a local library or a community health center.

Make a Plan

Before you begin testing, make a formal testing plan or testing protocol. Use this guide to choose the best method to test your material. See the guide below about how to build a plan for small-scale testing. For larger testing (i.e., more than 9 participants), you will need an expanded plan that includes PRA, IRB, budget, incentives, and other information. Talk to the research office in your organization to learn more about larger testing.

How to Build a Message Testing Plan

1. Summarize the test
   Give your test a title, write a brief description, and determine the goals of testing.

2. Identify material to test
   - Material:
   - Intended audience:
   - Main message:
   - Purpose:

3. Write research questions
   These aren't the questions to ask participants. Rather, they are the questions that you want to answer through testing. For example, how clear are the key messages or is the document easy to read and use?

4. Choose a testing method
   - Method:
   - Number of participants:
   - Logistic details (location, duration, etc.):

5. Decide how to find participants
   - Plan A:
   - Plan B (backup plan):

6. Determine what to ask participants
   This is your testing protocol—the questions you'll ask participants. Choose questions that will make sense to the participants and help you answer your research questions.

7. Draft plans for data management and analysis
   Determine how you will collect, store, manage, and dispose of the testing data. For example, will you be recording interviews with your phone (audio, video, etc.)? Will you avoid personally identifying information but collect general demographics (sex, race, age, education)?

8. Keep yourself organized
   Where are you thinking of testing and when? What do you need to bring with you to the testing site? Use this section to keep track of logistics. For example, indicate due dates or completion dates. Notate reminders to verify your testing venue has wi-fi or internet connection. Consider using a table or checklist for this section. Do you need any equipment or software? Do you need to keep track of any timelines or milestones?

9. Determine if there are other considerations
   Do you have any safety concerns, ethical issues, conflicts of interest, or other considerations you need to address or plan for?

Start with a good product

If you start with a good product, testing and revision will be faster and easier. And, if your first draft is in good shape, you may need to test only once. Use the tips below to create a strong product for testing.

Tip 1: Use a Brief

Before you begin, develop a communication plan or creative brief to identify things like intended audience, communication objective, tone, call to action, channel, and more.

- See Appendix A for a sample creative brief.
- The University of Cambridge, Winton Centre for Risk and Evidence Communication has a “tick-list” that you could use as communication plan or brief: https://cdn.who.int/media/docs/default-source/epi-win/evidence-communication-ticklist.pdf?sfvrsn=32184458_4

Tip 2: Follow Standards

Use communication and health literacy best practices when drafting your materials.

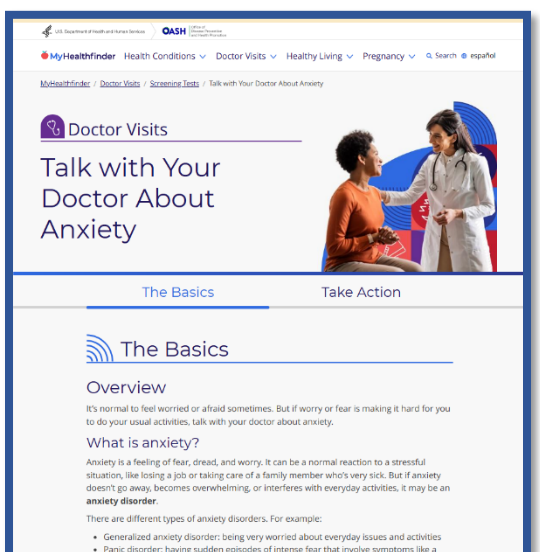
- Federal Plain Language Guidelines: https://www.plainlanguage.gov/guidelines/
- Clear Communication Index Design Guides: https://www.cdc.gov/ccindex/index-design-guides.html
- Health Literacy Checklist: https://health.gov/healthliteracyonline/checklist/

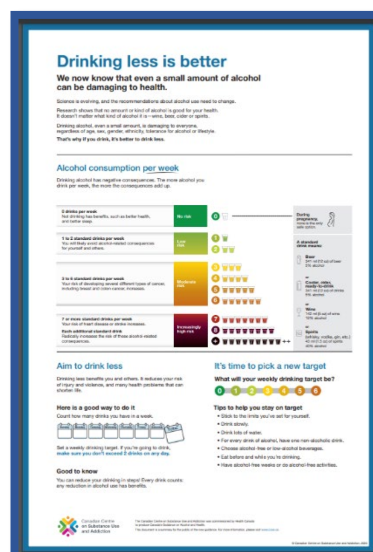
Tip 3: Use Models

Look at examples of clear, effective health materials that may serve as models for your materials.

- ClearMark Award winners: https://centerforplainlanguage.org/awards/clearmark/
- Before and after examples from plainlanguage.gov: https://www.plainlanguage.gov/examples/before-and-after/

Below: Clear Mark Award winners MDHHS, MyHealthfinder, and the Canadian Centre on Substance Abuse. Click on images to access these documents that may serve as models for your materials.





Five Audience Tests

There are several types of tests or evaluations you can use to test your materials. This section provides details about five tests to gather feedback directly from your intended audience: paraphrase test, in-depth interviews, focus groups, surveys, and comparative tests.

Paraphrase Test

Paraphrase testing will tell you what readers think of your content and if they interpret your message(s) as you intended. Paraphrase testing works best for short documents, web content, survey questions, talking points, and key messages. Follow these 7 steps for a paraphrase test.

1. Choose a short document (1 – 2 pages) or a short section from a larger document to test.
2. Mark your document with "**Stop Here**" after every sentence, paragraph, or section that you want participants to read and then discuss. It's best to add a stopping point after every 1 – 2 paragraphs. You can also set a stopping point after an important sentence. Make the "Stop Here" notation easy to see (e.g., large, bold, red font).
3. Recruit 3 to 9 participants (members of your intended audience or proxies) and set up an individual interview with each of them. Interviews can be in-person, over the phone, or by computer (e.g., a Zoom or Teams call).
4. During the interview, show or send the participant your document. Ask them to read until they see the first "Stop Here" notation. Then, ask them to tell you in their own words what that section means to them (i.e., ask them to paraphrase what they just read). Be sure to explain that this isn't a test of their reading skills but is a test of the author's writing skills. Explain that we need to know if the content is unclear, confusing, or hard to remember.
5. Write down each of the participant's paraphrases. Do not correct or interrupt the participant. Repeat this pattern until you've tested the whole document or selection with all participants.
6. Compare notes from all interviews to identify places where your content was unclear, misunderstood, or hard to remember for 2 or more participants.
7. Fix those issues and retest (if you have time).

Gather Additional Information

After the paraphrase test, take a few minutes to gather some additional insights from participants. Avoid "yes/no" questions; they don't provide much usable information. Instead, ask open-ended questions like this:

- What would you do if you got this document?
- What do you think the writer was trying to do with this document?
- What do you like or dislike about this document?

Sometimes participants might be uncomfortable or embarrassed to say what they find difficult to understand in a document. It may be easier for them to discuss problems they think others may have when trying to read the document. In those situations, you may want to ask questions like this:

- If I gave this document to someone who was busy, stressed, or had difficulty reading, what about the document might cause them problems?
- What would make this document more helpful for them?

In-Depth Interviews (IDIs)

IDIs are especially helpful when you need detailed information or when you are testing a sensitive or difficult topic. IDIs provide one-on-one privacy and an opportunity for you to probe deeper. IDIs are also good for more introverted testers or those who may be influenced by others in a focus group. Follow these 5 steps to conduct in-depth interviews.

1. Develop a **testing plan** specific for IDIs. In addition to the standard protocol items, this plan should also include the following:
    - Talking points you'll use to set up the interviews (i.e., explaining the purpose, format, length, and other key details).
    - Details about how you will gather feedback from the interviewees (e.g., hand notes, laptop notes, videotape, audiotape, or some combination of methods).
    - Details about how you will analyze findings. For example, you may want to summarize each interview and then compare summaries to identify recurring themes. You may want to create a table that categorizes and counts the main issues or problems revealed by interviewees.

2. Develop an **interview guide** (see Appendix B) that includes the following:
    - A conversational script that you'll use to start the interviews (e.g., discussion about informed consent and confidentiality, how the interview notes will be used and disposed, an offer for them to ask questions before the interview begins).
    - An informed consent form for each interviewee to sign before you start asking questions.
    - About 4 – 10 questions you'll ask during the IDIs.
    - A conversational script to close the interview.

3. Recruit 3 to 9 participants and schedule interviews in person, over the phone, or on a platform like Teams or Zoom. Schedule interviews for 30 to 60 minutes each. Schedule all for the same amount of time.

4. Conduct the IDIs and analyze your findings using the protocol you established earlier.

5. Revise your messages or materials according to IDI results, and re-test if you have time.

TIP: Participants might feel uncomfortable telling you that something is unclear or confusing if they know you wrote it. Instead, simply say that you are testing these messages or materials for your organization.

Pick the Right Questions

Use a mix of open-ended questions, multiple-choice questions, and specific tasks. For example:

1. Who do you think this material is written for?
2. What is this material asking you to do?
3. Does this material provide too much information, the right amount, or not enough information?
4. If you received this material, how likely would you tell others about it (very likely, somewhat likely, unsure, somewhat unlikely, or very unlikely to tell others)? Why?
5. Is there anything more you would like to tell me about this material?

See Appendix C for a question bank that you can pull from for your interviews.

Focus Groups

Why should I hold a focus group?

You can get a lot of valuable feedback in a short amount of time when you're talking to a group of people. Focus groups can help at any point during the development process — use them early to help inform your material or later to get feedback on a draft.

How many focus groups do I need, and how many participants should be in each group?

This guide is for small-scale testing. However, the more people you test with, the clearer your findings will be. It's also helpful to have more than one focus group to compare results across focus groups. For small-scale testing, aim for 2 focus groups with 4 people each. This keeps the groups to a manageable size, and you shouldn't need a specialized space or equipment for recording (like a boom mic).

What details do I need to think about for a focus group?

- **Invite**: After you recruit your participants, send a "save the date" notice 4 weeks in advance, a formal invite 1 week ahead, and a reminder the day before the focus group. Consider having an alternate participant or two on hand in case you have any last-minute cancellations.

- **Time**: Keep focus groups to about 45 to 90 minutes so they aren't a time burden on you or the participants. It's also easier to keep people focused for around an hour or so.

- **Location**: Conduct the focus groups in person, if possible, and in a comfortable space. For example, find a small conference room in your building with a table and comfortable chairs. Provide refreshments or at least water. Use name tags or name tents to enhance the personal nature of the session.

- **Recording**: Audio record the focus group with your phone or a digital voice recorder. Participants may be less comfortable with video recording. Inform participants before you begin recording.

- **Alternate Option**: If your group can't meet in person, use a widely used virtual platform like Zoom or Teams. Ask everyone to be on camera. Record the session, but tell participants before you begin recording.

- **Leaders**: You will be the facilitator (or moderator) of the focus group. Ask a colleague to assist you by taking notes, handling the recording device, and making observations that you can discuss after the focus groups.

- **Material**: Select a short document (1 – 2 pages) or short section of a larger document so that participants can quickly read and think about the material you are testing.

- **Prep**: Develop a moderator's guide for the focus group. It should contain a script and agenda (e.g., introductions, ground rules, conversation prompts, and other details). See Appendix D for a sample moderator's guide.

How do I run a focus group?

Here are general steps for a focus group. See Appendix D (moderator's guide) for a more detailed focus group agenda.

1. Make introductions
    - Introduce yourself as the facilitator.
    - Introduce your assistant as the notetaker, recorder, and general observer.
    - Ask participants to introduce themselves.

2. Go over some housekeeping issues and ground rules
    - Briefly explain the purpose of the focus group (e.g., to determine if a fact sheet is clear and easy to use).
    - Explain how long the focus group will be, point out the location of restrooms, and request that everyone turn cell phones off.
    - Ask participants to be polite. Don't interrupt each other or have side conversations, for example.
    - Encourage them to speak openly and freely, sharing both positive and negative opinions. Emphasize that there are no right or wrong answers.
    - Ask participants not to dominate the conversation so that everyone has a chance to be heard.
    - Ask them to avoid offensive language.

3. Get consent and begin recording
    - Explain how the session will be recorded and remind everyone they can stop participating at any time. Explain what you will do with the notes and recordings after the focus groups. Inform participants how they can request a copy of your testing results or report.
    - Ask everyone to sign a consent form, and then begin recording.

4. Share the material you are testing and give everyone several minutes to read and think about the material.

5. Facilitate a discussion about the material (i.e., use your moderator's guide). Thank your participants for their time and thoughts.

6. Debrief immediately (if possible) with your testing assistant to compare observations. Record this debrief.

7. Conduct any additional focus groups following these same steps.

8. Compare notes and recordings from all focus groups. Revise materials according to focus group findings.

Tips for the Moderator

- Try not to interrupt (unless someone is talking excessively). And it's ok to allow short stretches of silence; it may encourage participants to elaborate.
- Don't interject your own opinions, but it's ok to probe with questions like "Would you explain further?" or "Would you give an example?" or "I don't understand."
- Control your responses. It's ok to nod your head or verbalize things like "ok" or "mmhmm." But refrain from value statements like, "That's good" or "Excellent!"
- Consider ending the focus group with a summary of what you've learned and confirmation from participants that your summary accurately reflects their views.

Tips for the Assistant

- Start, monitor, and stop the recording equipment. Immediately after the session, check to make sure the recording worked.
- Sit in an unintrusive spot and quietly take notes and observations during the session. Don't actively participate in the discussion.
- Help with things like adjusting the room temperature or replenishing the refreshments, if needed.
- Draw a diagram of the seating arrangement in case you and the moderator need to refer to it later during the debrief.
- Help the moderator keep track of time. Use time cues or signals to alert the moderator if you are getting off schedule.

Surveys

Surveys are a quick and affordable way to get structured feedback (i.e., quantitative data) about your material. For example, you can ask multiple-choice questions or use a Likert scale (e.g., rating scale from 1 to 5 or a likelihood scale that includes options such as "very unlikely," "somewhat unlikely," "unsure," "somewhat likely," and "very likely"). If you use an online survey platform that automatically collects and tabulates survey data, then you can quickly see quantitative results. For example, a survey may show that 60% of respondents think your material is very confusing and only 5% think it is very clear (i.e., if you use a "very confusing" to "very clear" scale).

Your Questions are Critical

Since you won't be able to interact with your participants (like in interviews or focus groups), questions are critical for this testing method: they need to be specific and clear. Shorter is better too. Don't include more than one ask in each question. And avoid leading or biased language. For example, don't ask what respondents think about this "widely used" or "comprehensive" fact sheet. See Appendix C for a bank of questions to pull from for your survey.

Small Surveys: The 5-5-5 Approach	Large Surveys: PRA Exceptions
For a quick bit of feedback, consider using the "5-5-5" approach to surveys: • survey **5 people** from your intended audience • and ask them **5 questions** • that can be answered in **5 minutes** or fewer	Remember that federal employees need OMB approval to test more than 9 people total. However, you may be granted an exception if all your participants are federal employees and if you are getting feedback about standard practices. For example, you may be able to send a survey to 50 federal employees to ask about the effectiveness of new training materials. Check with the office in your organization that coordinates OMB/PRA approvals.

Use These Survey Tips

- **Don't forget to start with a testing plan or protocol**. This will help you set your survey goals, select effective questions, identify appropriate participants, and more.
- **Test your survey**. Send it to yourself and a couple of colleagues first to make sure you understand the technology and to get a little feedback before you send it to participants.
- **Don't set a long due date; people may forget**. Give them a couple of days and send a reminder if response rates are slow.
- **Use online survey platforms for easy distribution and data collection**. For example, platforms like SurveyMonkey, Google Forms, and MS Forms have free account options and features that help you track response rates and tabulate results.
- **Check with your organization to see if you have customized survey options**. For example, CDC developed Pulse Check for CDC/ATSDR employees to send message-testing surveys to other CDC/ATSDR employees for feedback.

Comparative Tests

In a comparative test, you compare different materials to determine which performs best or is preferred by your intended audience. Marketing companies and tech firms use comparative tests for insights about logos, slogans, color schemes, viewer engagement, and the like. You can use comparative tests for specific messages (like a main message) or to help resolve differences when you and your colleagues or supervisors disagree about how to communicate something.

A/B Test

A/B testing is a type of comparative test you can use for message testing. You need to create two versions of your message or material (i.e., version A and version B). For example, maybe your team can't decide on how to frame the main message in a fact sheet about vaccines. Create two versions, each with a different main message. Recruit 5 to 9 participants, randomly divide them into 2 groups, and show each group 1 version. You can get feedback from the participants via a survey or interviews. Compare results to see if one of the main messages performed better or was preferred more.

Preference Test

A preference test is another type of comparative test that helps you identify what works best. Again, you need to create 2 versions of your material for this test. But with this method, you show all your participants BOTH versions. Ask them to evaluate both (via survey or interview). Compare results to determine which version performed best or was preferred by participants. A preference test takes longer and places a greater burden on testers, but you get more feedback.

Resources

- What is A/B Testing (video by Data Science Dojo): https://youtu.be/zFMgpxG-chM?si=PCi1FvlSftSlZyr3

Other Tests

You may also want to consider using one of the following checklist-style testing tools. The tests below don't solicit feedback from your intended audience. Instead, they help you, or a coworker, evaluate your materials based on best practices. These tests can help ensure you avoid or overcome any assumptions you may make about your materials.

Clear Writing Assessment (CWA)

The CWA offers 24 questions for you to answer about your own materials. Evaluate your materials by answering questions about audience, purpose, structure, headings, emphasis, formatting, and plain language. The tool automatically calculates a score based on your answers. The user guide explains why these 24 questions are important and how to fix problems if you don't get a passing score.

- **CWA**: https://www.cdc.gov/nceh/clearwriting/docs/Clear_Writing_Assessment-508.pdf

Clear Communication Index (Index)

The Index is CDC's research-based tool to help you assess health communication materials. It has 4 introductory questions and 20 scored items drawn from scientific literature in communication and related disciplines. The items represent the most important characteristics that aid people's understanding of information. They cover health literacy, information design, behavioral recommendations, numeracy, and risk communication. This tool automatically calculates your score. The user guide explains the tool and how to fix materials that don't get a passing score.

- **Index**: www.cdc.gov/ccindex

Health Communication Message Review Tool

The University of Toronto's Centre for Health Promotion developed this 12-step checklist to help authors determine if their messages are persuasive. Access the tool with the link below. Consult the following pdf for more background information on the tool: www.nccmt.ca/registry/resources/pdf.63.pdf.

- **Message Review Tool**: https://phabc.org/wp-content/uploads/2015/07/Message-Review-Tool-1-pager.pdf

Revise According to Testing Results

Sometimes your test results may seem immediately apparent. For example, if you conduct a paraphrase test with three participants and they all indicate that the first paragraph is confusing, you know you need to revise it. But how? Effective testing will reveal not only that you need to revise but also why, where, and how to revise.

A 4-Step Method

You need to analyze your testing results to determine how to revise your materials. One way to do this is by following these 4 steps:

1. **Transcribe** recordings, notes, and observations.
2. **Identify** recurring themes.
3. **Group** or classify your data.
4. **Draw** conclusions.

STEP 1: Transcribe

As soon as possible after testing, transcribe any recordings. To this transcription, add a section that lists your notes and observations from the testing sessions. Add the notes and observations from anyone else who helped you test (for example, your focus group assistant). Do this while the testing is fresh in your mind.

STEP 2: Identify Themes

During this step, identify similar feedback that you received from different participants. One effective method is to use different colors. For example, if you have a print copy of your transcript (step 1), use different color highlighting markers. Use yellow for every time a participant identified an unfamiliar term, a green marker for every confusing passage or section, an orange one for content participants identified as unimportant or irrelevant, and so on. This will help you identify recurring themes. For example, testers were unfamiliar with scientific terminology in the fact sheet or testers indicated much of the fact sheet is unnecessary.

STEP 3: Group Data

If you have a lot of data, you may need to copy and paste data into a spreadsheet or table so that you can better see the themes or recurring feedback. You may also be able to further classify the information or identify more specific patterns once you group it in a spreadsheet or table. See the example below.

Participant # (or name)	Confusing passages	Confusing terminology	Key takeaway (identified by participant)	Unimportant information
1	NA	Superfund site	Stay away from the area	NA
1	Contact section: Is there a preferred way to contact someone for more information or do I do whatever is most convenient for me?	NA	Cleanup is happening	NA
2	NA	NA	Cleanup is ongoing	NA
3	Section 2: summary of investigation conclusions was too technical	Superfund site	The area is dangerous	How the site got contaminated

4	NA	NA	Cleanup is happening	NA
5	Section 2: summary of investigation conclusions was too technical	NA	Stay away from the area	Next steps for anyone besides residents/me

STEP 4: Draw Conclusions

Here's where you interpret the data and describe, in detail, what you've learned. It's where you decide what feedback is most important. And it's where you identify what, specifically, you need to revise. For example, the previous steps helped you identify that scientific terminology may be a problem with your intended audience. So now you identify specific words and phrases in the fact sheet that you need to revise with plain language alternatives or definitions.

Resources for Revision

Use these resources to help fix the problems you identified with testing:

- Plain language thesauri: CDC's Everyday Words and the Environmental Health Thesaurus
- Chicago Manual of Style: Glossary of Problematic Words and Phrases
- Federal Plain Language Guidelines

TIP: Most of us have a series of approvals we must secure before we can publish our public health materials. Sometimes our reviewers disagree with our approach or the way we've communicated health messages. Consider sharing your testing results with these reviewers, so everyone has a shared understanding of who you are trying to reach, what the communication objective is, and why you've written this way. Sharing that information may help avoid a battle of opinions by offering objective data on what works and what doesn't for specific materials and specific audiences.

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Appendix A: Sample Creative Brief

Project Title:

Brief Description:

Deliverables:

Basic Information

- **Division/office/branch**:
- **Points of contact**:
- **Due date:**

Communication Framework

Who is the intended audience? What are their health literacy skills?
[For example: Professionals who work at CDC partner organizations are the primary audience, and policymakers are a secondary audience. These audiences have average to high health literacy skills.]

What is the primary communication objective?
[For example: Increase the number of CDC partners and policymakers who are knowledgeable about our environmental health activities, their impact, and how partners and policymakers can affect environmental health policy.]

What is the main message?
[For example: CDC conducts and funds many ongoing and exciting initiatives to advance environmental health in communities across the country.]

What is the call to action?
[For example: Visit the CDC website to learn more so you can share important environmental health initiatives with your policymakers.]

Product Logistics

What will the content process involve?
[For example: Group A will draft a newsletter title and evergreen section headers. Group B is responsible for updating quarterly newsletter content and sending the newsletter.]

What will the design process involve?
[For example: Group A will develop email newsletter design — including title, header, graphics, layout, and styling. They will follow CDC's branding guidelines outlined in the agency brand book. The design process will take into consideration email template best practices.]

What will the development process include?

[For example: Group A will deliver source files for an Adobe Campaign newsletter template with a modular design so CDC will be able to remove, add, or move various blocks of content and images in Adobe Campaign. The newsletter will not be able to accommodate videos that are played within the newsletter itself, but it can accommodate screenshots of videos along with links to find the videos elsewhere. Group B will QC the template to ensure it's optimized for common mobile platforms, such as iOS and Android. The email newsletter template will be … (add technical specifications here)].

Timeline

What are the milestones or major steps for the project?

Milestones/Steps	POC	Due Date
1.		
2.		
3.		
4.		
5.		

Inspiration

- [Insert links, images, and descriptions of similar project that may serve as a model or inspiration for your project or material.]

Distribution

- [Insert information about how, when, and who will distribute the product or material.]

Testing & Evaluation

- [Insert information about how you will test materials before publication.]
- [Indicate if you will evaluate the effectiveness of materials after publication. Briefly explain how.]

NOTE: This is a basic creative brief. You may want to include information about tone and voice, budget, stakeholders, or other considerations. You may also need to include method-specific information. For example, include an interview protocol and interview guide (Appendix C) for IDIs.

Appendix B: Sample Interview Guide

An interview guide should contain an introduction, a set of questions, and closing comments. See the sample below.

Introduction

Write a conversational script that includes thanks, identification, purpose, duration, confidentiality, process, questions, and consent.

> Thank you for taking the time to meet with me today. My name is ________________, and I would like to talk to you about [e.g., a fact sheet CDC developed about preventing lead poisoning].
>
> This interview should take [about 30 minutes]. I will be [recording, videotaping, etc.] the interview so that I don't miss any of your helpful feedback. I may also [take some notes during the interview].
>
> All your feedback will be kept confidential. This means that I will share your responses only with [e.g., two team members working on this fact sheet; my supervisor; etc.]. Also, I will make sure that any information I include in my final report does not identify you individually. For example, my final report may say something like, "All participants stated this…" or "One participant identified that…" After I write the final report, I will [e.g., delete my recordings and shred any paper notes].
>
> Please also remember that you don't have to talk about anything you don't want to, and you may end the interview at any time.
>
> Do you have any questions about what I just explained? Are you willing to participate in this interview? If so, please sign this to indicate your informed consent.
>
> ________________________________ Interviewee Informed Consent
> ________________________________ Legal Guardian (if interviewee is under 18) Informed Consent
> ________________________________ Date

Questions

Keep the interviews short by asking only 4 to 10 clearly written questions. Use questions that will help you quickly determine if your messages or materials are easy to understand and appropriate for your intended audience(s). You may also need to draft some probing questions or ways to generate conversation for participants who don't provide detailed or sufficient responses. See Appendix D for sample questions.

Closing

Write a conversational closing that includes thanks and information about next steps. Also, give participants an opportunity to ask questions before you end the interview.

> Thank you again for your time. This was very helpful feedback. I am conducting a total of [6] interviews for this project. After I complete all the interviews, I will analyze the information from all interviews to determine how to [improve this fact sheet and make it easier to understand and use]. I plan to put together a brief report of my findings. I can email you the report if you would like to receive a copy. Do you have any final questions for me before we end the interview?

Appendix C: Question Bank

Not sure what questions to ask in your interview, focus group, or survey? Consider using some of these questions.

Open Ended Questions

1. Where would you expect to see a [product] like this?
2. Who do you think this material is written for?
3. What is this material asking you to do?
4. What would make this material easier to understand?
5. What would make this material more useful?
6. Were any specific parts of this [product] unclear or confusing?
7. Did this [product] use any jargon or technical language that you or your family members may be unfamiliar with?
8. Of all the things presented in this [product], what is most important to you? Or, is the most important information missing?
9. In your opinion, are any of the words or images in this material inconsistent with the lifestyle or religious or cultural norms of the intended audience?
10. Are there any specific statements in this [product] that your or a family member may think are exaggerated or untrue?
11. Did this [product] make you change your mind about anything? Can you explain why or why not?

Multiple-Choice Questions

1. How likely are you to do what the material asks (very unlikely, unlikely, unsure, likely, very likely)?
2. Does this material provide too much information, the right amount, or not enough information?
3. On a scale from 1 to 5, how well organized is this document (1 being poorly organized and 5 being very well organized)?
4. On a scale from 1 to 5, how truthful do you believe the message is (1 being complete untrue and 5 being completely true)?
5. How easy or hard is it to…

	Very Easy	Pretty Easy	In Between	Pretty Hard	Very Hard
Read this					
Understand it					
Remember it					
Use it					

6. If you received this material, how likely would you…

	Very Likely	Somewhat Likely	Unsure	Somewhat Unlikely	Very Unlikely
Read it					
Use it					
Tell others about it					

Sample Tasks

1. As you read, please underline the words and phrases that are most helpful to you.
2. Circle anything that's confusing or may be confusing to a family member or friend.
3. Put a square around anything you would like more information about.

4. Number each section in order of importance to you. For example, if you would like to see the last section at the top of the first page, you would put a #1 or #2 beside it.

Content-Specific Questions

1. How would you use this chart to figure out [e.g., which vaccines your 4-year-old child needs]?
2. How would you explain the action items to a family member or friend?

Final Question

1. What recommendations do you have for [me/this product]?
2. Is there anything more you would like to add?

Appendix D: Sample Moderator's Guide for a Focus Group

Moderator's Guide: Emergency Response PSA Testing

Overview

Total time: 60 minutes

Section	Time	Description
A: Welcome and Opening	5 minutes	The moderator will explain the purpose of the session, review key points from the consent form, and begin with warm-up questions.
B: PSA Testing	50 minutes	Participants will give feedback on the clarity, visual appeal, and actionability of 3 video PSAs.
C: Closing and Thank You	5 minutes	Participants will share any final thoughts.

A: Welcoming and Opening Remarks (5 minutes)

Hello. Thank you for joining me today. My name is [moderator], and I'm conducting this session on behalf of CDC. This is [assistant] who will be observing and taking notes for this focus group.

The purpose of our discussion today is to get your feedback on video public service announcements, or PSAs, related to different environmental health topics.

I'm happy to meet you, and I look forward to getting to know you better during this session.

Did you get the consent form? *{If no, screen share consent form and review with participant.}*

Do you have any questions about the consent form? I'm going to briefly go over a few key points in the consent form.

Your participation is voluntary.

- This means you have the right to stop at any time. You're welcome to pass if there's a question you'd rather skip.

There are no wrong answers.

- I'm here to learn from you and get your opinions.
- I'm testing the videos — not you.
- I'm not trying to promote any product or service to you. These videos will be a free resource and available to everyone.
- Whether you love or hate the material you see today, it's all the same to me. I welcome all kinds of opinions.
- It's ok to agree or disagree with each other's opinions. But let's be respectful to each other. Please don't use offensive language or what others may consider "bad words."

Your feedback will help improve the video PSAs.

- I'll be [audio/video] recording today's session. The recording will help me remember what we discussed and looked at.
- I'll be writing a report based on feedback from you, but I won't include anyone's name in my report.
- Any information I collect is anonymous and confidential — we'll only use it to improve the PSAs.

Do you have any questions or concerns about being part of this study? *{Answer any questions and address concerns.}*

I have a few other logistics to cover:

- Today's session will take about 45 minutes and we'll wrap up at [time AM/PM]. I apologize in advance if I occasionally interrupt you. I want to be mindful of our time and keep us moving.
- If you haven't already and you're able to, please put your smartphone on silent or in do not disturb mode.
- If anyone needs to step out for any reason, please feel free to do so. The restrooms are [point out location].

I'm going to start the recording now. Is that okay with you? *{If participant says yes, notetaker starts recording.}*

Now, let's get to know each other a little bit.

- Let's go around the table and share your name, where you are from, and something you've done recently for fun.

{Moderator may provide a response to these questions as part of rapport building.}

Thank you for sharing.

B: PSA Testing (50 minutes)

As I mentioned, we want to get your feedback on some draft video public service announcements (PSAs) about different environmental health topics. We're developing these videos to help inform people about preparing for environmental health emergencies. The versions we'll look at today aren't final, so your feedback will help us make improvements.
I have a total of 3 short videos. We'll look at the videos one at a time. I'll ask you questions about each video after it's played.

{Moderator will play each video PSA one at a time on the screen in the conference room. Order of PSAs will be randomized across sessions. Moderator plays first PSA video.}

First Impressions

- Did anything from that video stand out to anyone?
- Did anyone like anything in particular about the video? *{If needed, probe on visuals and words.}*
- Did anyone dislike anything in particular about the video? *{If needed, probe on visuals and words.}*

Clarity and Understanding

- What do you think is the main idea or message in this video? *{Ask, "Anyone else?" as needed.}*
- Was anything in the video new to anyone?
- Does anyone think that something was unclear or confusing in the video?
- Do you think something might be confusing to others you know?

Actionability and Credibility

- After seeing this video, what, if anything would you do next? *{If needed, ask "how" for clarification.}*
- On a scale from 1 to 10, with 1 being "not at all credible" to 10 being "extremely credible," how credible is this video? What, if anything, would make it more credible?

{Repeat questions for each PSA — approximately 15-minute discussion per PSA.}

Communication Preferences (about ALL videos)

- Where would you expect to see video PSAs like these?
- Who would you say these PSAs are for? Why?
- Is there anything else anyone would like to share about these videos? Any other recommendations for how to make them better?

C: Closing and Thank You (5 minutes)

Thank you for your time. It was great to meet you and we really appreciate your feedback. I'm going to check in with my team and see if they have any additional questions.

{Check with observer for remaining questions.}

Would you like to share anything else before we end this session?

{End recording after all comments or questions are addressed.}

Again, thank you!