Steps for Pretesting Materials

Pretesting is the process of bringing together members of the priority audience to react to materials before they are produced in final form. It measures the reaction of the audience – in this case, cancer patients, caregivers, and health workers – to draft materials to determine if they are understandable, believable, and appealing.

Below are some key steps in pretesting the materials you have developed or adapted with patients, caregivers, and health workers.

Step 1: Outline Key Objectives

To guide the pretest process, the team should develop a plan with a clear set of objectives for each component or material being tested. The objectives describe the aims of the pretest and the information to be gathered.

Some sample objective(s) for your pretest might be:

- Determine if the information and graphics are appropriate and understandable.
- Identify any gaps in information that should be addressed in the material.
- Determine if any information is offensive or insensitive to cancer patients and caregivers.
- Assess if the materials are appealing and enjoyable to read.

Step 2: Choose the Pretest Method

After the pretest objectives are established, select the pretest method. The pilot project used focus group discussions and individual interviews with cancer patients and caregivers to pretest the booklets. However, it was not always easy to recruit for focus groups because patients and caregivers have many other priorities and time constraints. In Uganda, the consultants conducted interviews with patients and caregivers recruited right at health facilities and hostels. Participants were given the materials to review on their own for an hour before participating in an individual interview.

Pre-testing the flipcharts involved both observation and individual interviews. First, the consultants oriented health workers to the flipchart’s content and offered instructions on how to use it during patient education sessions. Then, they observed the health worker using the flipchart with an actual group of patients or caregivers, noting any areas of difficulty in using the tool. Following the session, the consultants interviewed the health worker and the participants to learn what worked well in the flipchart, and what needed to be added or changed.
Step 3: Plan the Pretest

Planning includes identifying the location and meeting site, recruiting participants, identifying facilitators and interviewers, determining incentives, and developing question guides.

Now is the time to refer back to the mapping you did during the ‘Inquire’ Step to identify potential partners and sites for the pretest. You’ll make decisions with these partners about the methodology, recruitment process, and logistics. It is also important to identify the safeguards will be needed to protect the well being of patients and caregivers who participate in the pretest activity.

For focus group discussions and in-depth interviews, make sure to identify trained or experienced moderators or facilitators. Trained facilitators can be found at universities, research firms, or partner organizations. If possible, use a facilitator who has similar characteristics (e.g. age, background) to the priority audience. This helps to develop trust and comfort among the participants. It is also important to have a trained note-taker who is familiar with the topic and speaks the local language.

You’ll need to create a budget that reflects costs for the meeting site, travel/accommodation, equipment rental, facilitator/moderator’s time, copies of draft materials, stakeholder meetings and incentives. Thoughtful budgeting can help ensure all pretesting costs are accounted for.

It’s important to share your pretesting plans with the Ministry of Health and other key partners. All recruitment and participation must be. You may need to obtain the appropriate ethical / institutional review board authorization; you will then need to factor in the review in your timeline.

Step 4: Develop a Question Guide

When pretesting the booklets, ask participants to give their feedback using the following questions as a guide:

a) How do you think most cancer patients (or caregivers, depending upon the pretest) in our country would react to this booklet? (probe: Was it useful? Helpful? Too long? Interesting? Boring?)

b) Is anything that is confusing or difficult to understand?

c) Is there anything about the booklet that you find annoying or offensive?

d) What does this material make you want to do?

e) What new information did you learn?

f) Are there questions that were not answered in this booklet that many patients (or caregivers) would want to see included? If so, what are they?
Step 5: Conduct Pretest

Be sure to obtain verbal or written participant consent prior to the pretest. Consent forms are written agreements that show the individual has volunteered to participate in the activity. It also informs the participant of the risks involved (or clearly states there is no risk).

A note-taker should be assigned to carefully document responses to the questions. Be sure to assign a note-taker who is detailed-oriented and understands the local language.

Pay attention to participants’ needs during the pretest and re-assess the situation if a participant seems fatigued or distressed.

Step 6: Analyze and Interpret Findings

To analyze:

a) Look for trends in responses. If a certain problem or change is mentioned multiple times, it is something that likely needs to be addressed.

b) Determine whether results highlight fundamental flaws with the design, messages, or format. If so, the material may need to be completely redesigned. Otherwise, basic revisions should address the problems.

c) Identify gaps in information that participants wanted to see included.

d) Consult materials development experts about the suggested changes or problems highlighted. Do not feel compelled to make every change participants suggest.

Step 7: Revise Materials and Retest

If the results of the pretest indicate that major revisions are needed, you may need to re-test the materials. The same question guide can be used as before with questions added or changed as needed on the particular areas of concern.

Step 8: Finalize Materials

Your final step is to revise materials based on the pretest. Then, after final medical review, you are ready to produce your new materials.