# WORKSHEET 14: PRETESTING PLANNING WORKSHEET

1. Which of the following methods will you use to pretest your messages and materials? (check all that apply)

   ❑ Focus groups

   ❑ Intercept interviews

   ❑ Self-administered questionnaires

   ❑ Theater or natural exposure testing

   ❑ Readability testing

   ❑ Usability testing

   ❑ Expert and gatekeeper review

   ❑ Other _____

2. Focus group planning

   a. Who will moderate the focus groups?

   _____

   _____

   _____

   b. Who will serve as assistant moderators?

   _____

   _____

   _____

   c. Where will the focus groups take place?

   _____

   _____

   _____

   d. With which segments will you do separate focus groups?

   Segment 1: _____

   Segment 2: _____

   Segment 3: _____

e. When will each focus group take place?

Segment 1:

Date: _____Time: _____to _____a.m./p.m.

Date: _____Time: _____to _____a.m./p.m.

Date: _____Time: _____to _____a.m./p.m.

Segment 2:

Date: _____Time: _____to _____a.m./p.m.

Date: _____Time: _____to _____a.m./p.m.

Date: _____Time: _____to _____a.m./p.m.

Segment 3:

Date: _____Time: _____to _____a.m./p.m.

Date: _____Time: _____to _____a.m./p.m.

Date: _____Time: _____to _____a.m./p.m.

f. How will you recruit participants for the focus groups?

_____

_____

g. What will you offer people as an incentive to participate?

_____

_____

h. Work plan:

| Activity | Who | Deadline |
| --- | --- | --- |
| Develop topic guide | _____ | _____ |
| Create mockups for pretesting | _____ | _____ |
| Locate facility | _____ | _____ |
| Set dates/times of groups | _____ | _____ |
| Select/train moderator(s) | _____ | _____ |
| Recruit participants | _____ | _____ |
| Confirm attendance with participants | _____ | _____ |
| Conduct focus groups | _____ | _____ |
| Transcribe audio/write up notes | _____ | _____ |
| Analyze results | _____ | _____ |
| Write report | _____ | _____ |

3. Intercept interview planning

   a. Who will serve as interviewers?

     _____

     _____

     _____

   b. What location(s) will you use to find participants and conduct the interviews?

     _____

     _____

     _____

   c. Between what dates or on which days will you conduct the interviews?

     _____

     _____

     _____

   d. What will you offer people as an incentive to participate?

     _____

     _____

     _____

   e. Number of responses needed: _____

   f. Work plan:

| Activity | Who | Deadline |
|---|---|---|
| Develop questionnaire | _____ | _____ |
| Develop "screener" | _____ | _____ |
| Test questionnaire | _____ | _____ |
| Select/train interviewers | _____ | _____ |
| Select site/get permission | _____ | _____ |
| Conduct interviews | _____ | _____ |
| Input data | _____ | _____ |
| Analyze data | _____ | _____ |
| Write report | _____ | _____ |

4. Self-administered questionnaire planning

   a. How will you select potential respondents?

     _____

     _____

     _____

b. How will you distribute the questionnaires to potential respondents?

_____

_____

_____

c. What will you offer people as an incentive to participate?

_____

_____

_____

d. Number of responses needed: _____

e. Work plan:

| Activity | Who | Deadline |
|---|---|---|
| Develop questionnaire | _____ | _____ |
| Test questionnaire | _____ | _____ |
| Write introductory letter/e-mail | _____ | _____ |
| Send out/distribute questionnaires | _____ | _____ |
| Compile questionnaires | _____ | _____ |
| Input data | _____ | _____ |
| Analyze data | _____ | _____ |
| Write report | _____ | _____ |

5. Theater or natural exposure testing planning

a. Which type of testing will you use?

❑ Theater  ❑ Natural exposure

b. How will you recruit participants for the tests?

_____

_____

_____

c. What will you offer people as an incentive to participate?

_____

_____

_____

*(Continued)*

(Continued)

    d. Between what dates or on which days will you conduct the tests?

_____

_____

_____

    e. Number of responses needed: _____

    f. Work plan:

| Activity | Who | Deadline |
|---|---|---|
| Develop test materials | _____ | _____ |
| Develop questionnaire | _____ | _____ |
| Test questionnaire | _____ | _____ |
| Recruit participants | _____ | _____ |
| Set date(s) | _____ | _____ |
| Locate theater facility | _____ | _____ |
| Select theater test facilitator | _____ | _____ |
| Contract with testing service (if using natural exposure test) | _____ | _____ |
| Input data | _____ | _____ |
| Analyze data | _____ | _____ |
| Write report | _____ | _____ |

6. Readability testing planning

    a. What is the approximate reading level of your target audience?

        _____ grade

    b. Using the SMOG Readability Formula, what is the approximate reading level of each of your print materials?

| Material | Grade Level |
|---|---|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

7. Usability testing

    a. What exactly will you be testing?

_____

_____

_____

b. How will you conduct observations of people using your project/design?

_____

_____

_____

8. Expert and gatekeeper review planning

   a. Which experts will you ask to review your materials?

   _____

   _____

   _____

   b. Which gatekeepers will you ask to review your materials?

   _____

   _____

   _____

   c. How will you collect the feedback from the reviewers?
      - ❑ E-mail
      - ❑ Online survey
      - ❑ Mail
      - ❑ Telephone
      - ❑ Individual interviews
      - ❑ Group meetings
      - ❑ Other

   d. Work plan:

   | Activity | Who | Deadline |
   | --- | --- | --- |
   | Develop questionnaire | _____ | _____ |
   | Identify potential reviewers | _____ | _____ |
   | Contact potential reviewers | _____ | _____ |
   | Compile questionnaires/feedback | _____ | _____ |
   | Analyze data | _____ | _____ |
   | Write report | _____ | _____ |