



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 15

Tips for recruiting people on site for  
immediate participation in a  
feedback interview

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



## TOOLKIT Part 6, Chapter 15

### Tips for recruiting people on site for immediate participation in a feedback interview

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This document is the fifteenth 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).

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## Introduction



Recruiting people on site is generally the **quickest, easiest, and most cost-effective way to get feedback from readers**. We encourage you to try this approach.

You will need to find a location that is suitable and get permission to do your testing there. To be suitable, the location must have space that lends itself to doing interviews and must offer easy access to potential participants who meet the requirements you have set for your feedback sessions.

Look for places where the types of people you want to interview tend to congregate naturally. Depending on your project and the material you are testing, there may be many possibilities, including clinics, senior centers, recreation centers, government offices where people sign up for health and social services, student lounges at adult basic education programs, community organizations, and other places. For more about site selection and issues to consider, see Toolkit Part 6, Chapter 13, *Choosing a location for your feedback sessions*.

This chapter explains how to approach and recruit people in person for participation in a feedback session. You can use in-person recruitment in two different ways:

- **To do same-day on-site interviews.** In this approach, you recruit people who happen to be at the site and then interview them immediately at that same location. This same-day on-site approach works well for individual interviews. It can also work for recruiting very small groups, such as groups of just two or three people, but not for focus groups. It's just not practical to try to gather a whole group of six to nine people to participate in an immediate focus group discussion.

**To set appointments for interviews or focus groups.** You can also use in-person recruitment for sessions that you are scheduling in advance. Since you have enough lead time to assemble a group, you can use in-person recruitment to schedule focus groups as well as interviews.

In this chapter, we focus mainly on using in-person recruiting to find participants for immediate interviewing. Usually, the person who does the recruiting also conducts the interview. When there's a two-person team of interviewer and note taker, one or the other person could do the recruitment, or they might work together.



## How to recruit on site

People who do on-site recruitment need a script that tells them what to say when they approach people. We give a template for this script below in Figure 6-15-a and a sample script based on this template in Figure 6-15-b. They also need information about the site itself and some instructions. For example, the instructions might describe the arrangements that have been made, give the name and phone number of the contact person, tell interviewers where to check in at the site, and tell which types of people they should approach. Figure 6-15-b includes a sample page of instructions.

### Figure

6-15-a. Template for creating a script for on-site recruitment.

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#### Start by getting the person's attention

Start your script with a sentence or two that recruiters can use word for word when they approach a potential participant. Often, recruiters introduce themselves and give their affiliation as part of this initial contact.

The sample script in Figure 6-15-b uses the following words to start the dialogue with a prospective recruit: *Excuse me - if it's okay with you, I'd like to tell you about something we're doing here today. We're looking for volunteers, and I'd like to see if you might be willing to help.* Here are some things to notice about the wording of this example:

- **It is friendly, low-key, polite, and respectful:** it starts with *excuse me*, and essentially asks permission to continue (*if it's okay with you*). This allows a person who doesn't want to be bothered to refuse right at the beginning.
- **It uses the word “volunteers” to emphasize that it's up to the person to decide whether to participate or not.**

## 2 Give brief background on the project and its purpose

In this section of script, you tell about the sponsoring organization, the type of written material, and the purpose. Be specific, but keep it brief. If you think that some people you approach will want more details, you can include a more complete explanation to be used only if someone asks.

Here is the background section from the sample script shown later in Figure 6-15-b: *The Medical Assistance program has been working on a new form for people to use when they apply for Medical Assistance. The program wants to find out how easy it is for people to fill out this new form. So today I'm showing it to people to get their opinions.*

## 3 Ask screening questions to see if the person meets requirements

In this section of the script, you make sure that people meet the requirements for participation. If they don't, you thank them and move on to the next prospective participants. The requirements you set and how you need to screen for them differs from study to study.

- **When you are doing in-person recruitment, you can do some types of screening based on people's appearance**, such as screening for age, gender, or race (recognizing that it can be hard to do this accurately in some cases).
- **For other requirements, you will need to ask direct questions.** When you ask screening questions, be sure to follow whatever privacy protection rules apply.

## 4 Be specific about what's involved; give assurances if applicable

In this section of the script, you explain what would happen in the feedback session and how long it would take. This is where you emphasize that reading will be required, and give any assurances that are appropriate, such as telling how you will protect people's privacy.

Here is an excerpt from Figure 6-15-b, showing the wording of a direct pitch: *I'd like to have you read the instructions for this form, which might include reading some parts aloud. Then I'll ask for your reactions. I'll also ask you to fill out a few sections of the form. Medical Assistance will use your feedback to improve the instructions and the form. This interview would take about half an hour. I know that you're waiting for them to call your name, but don't worry – we would stop when your name is called. And whether you help or not, your benefits won't be affected in any way.*

Here are some things to notice about the wording of this example:

- **It screens for reading ability in an indirect, face-saving way that makes it easy for a non-reader or poor reader to say no without giving a reason.** The sentence, *I'd like to have you read the instructions for this form, which might include reading some parts aloud*, gives the clear message that reading ability is essential, but it doesn't force the person to say whether they can read. Mentioning the possibility of reading aloud is one way to emphasize the reading task.
- **It anticipates and addresses two types of concerns.** To reassure people that they will not lose their place in line if they agree to be interviewed, the recruiter promises that the interview will end when the person's name is called. To avoid exerting undue pressure to participate, the recruiter tells people that if they say no, it will not affect their Medical Assistance benefits.

#### 5 Ask whether the person might be willing to participate

In this section of the script, you ask directly if the person is interested in participating. For example, if you are recruiting for an immediate interview, you can ask, *Does this sound like something you might be willing to do?* If you are scheduling appointments for later, you can specify a time period: *Does this sound like something you might be willing to do about two weeks from now?* Notice that the tentative phrase, *might be willing to do*, still leaves room for the person to ask questions or change their mind when they hear more.

#### 6 Give the details (payment, etc.) and answer questions

In this section, you tell about compensation, if any, offer help with transportation, if applicable, and offer to answer any questions. Here is an example from Figure 6-15-b: *We are offering a \$25 grocery store gift certificate as a thank you for your time. Do you have any questions?*

#### 7 Begin the interview (or schedule it for later)

At this stage, the person has agreed to participate, so you either start with the interview or, if you are recruiting for sessions to be held at a later date, you can arrange an appointment. Be sure to collect contact information so that you can send a confirmation letter and make reminder phone calls.



Source: Adapted for this Toolkit from training materials the writer has used in various projects.



## Example of a script for on-site recruitment

To conclude this chapter, we show a sample reference sheet and script for on-site recruitment below in Figure 6-15-b. These materials show how to apply the template described above in Figure 6-15-a.

**Figure**

6-15-b. Sample interviewer instructions and script for on-site recruitment.

In this fictional example, the purpose of the project is to get reactions to a revised application form for people who are applying for Medical Assistance. The project is using same-day on-site interviewing at a state agency where people go to sign up in person for Medical Assistance. The interviewers do their recruiting in the large waiting room at the agency, then take participants to a small room just off the waiting room to conduct the interview.

The recruitment materials for this project are shown below in two parts. The first is a list of recruitment reminders. This list summarizes key points from interviewer training. The second part is the actual recruitment script.




### Feedback sessions on the revised application form

#### Recruitment reminders:

- Check in with the contact person and the waiting room help desk when you arrive.
- Approach people as soon as possible after they leave the counter to begin waiting for their name to be called. This will ensure that you select people who have come to sign up for Medical Assistance (rather than accompanying someone who has), and will also allow more time for the interview.
- Try to recruit a good mix of people (males and females of different ages). Include some people who are already on Medical Assistance and some who are just signing up. Avoid approaching anyone who looks tired, upset, or ill. If people seem annoyed or suspicious when you approach them, thank them politely and leave them alone.
- Explain more about the program and the interview, as needed.
- If necessary, explain that you have been given permission to go up to people in the waiting room to tell them about the new application form project and see if they want to be interviewed. Sometimes, facilities will give you a name badge or other identifier to wear while you are on the premises.
- Once an interview is underway, listen to the loudspeaker announcements, and stop the interview immediately if the person's name is called. Ask whether he or she is willing to come back later to finish the interview (we have found that most people are). If not, thank the participant, give the gift certificate, and get a signature on the acknowledgement form to show payment has been made.



Figure 6-15-b continued.

Feedback sessions on the revised application form

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### Recruitment script:

Start by getting the person's attention:

Excuse me - if it's okay with you, I'd like to tell you about something we're doing here today. We're looking for volunteers, and I'd like to see if you might be willing to help.

Explain the purpose of the project:

The Medical Assistance program has been working on a new form for people to use when they apply for Medical Assistance. The program wants to find out how easy it is for people to fill out this new form. So today I'm showing it to people to get their opinions.

Be specific about what you are asking the person to do, and give assurances:

I'd like to have you read the instructions for this form, which might include reading some parts aloud. Then I'll ask for your reactions. I'll also ask you to fill out a few sections of the form. Medical Assistance will use your feedback to improve the instructions and the form.

This interview would take about half an hour. I know that you're waiting for them to call your name, but don't worry – we would stop when your name is called. And whether you help or not, your benefits won't be affected in any way.

Ask about possible interest:

Does this sound like something you might be willing to do?

If "yes" or "maybe," tell about the gift certificate and offer to answer questions:

We are offering a \$25 grocery store gift certificate as a thank you for your time. Do you have any questions?



Source: This fictional example is adapted from scripts used by the Toolkit writer in various projects.

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

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