



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 13

Choosing a location for your  
feedback sessions

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



## TOOLKIT Part 6, Chapter 13

### Choosing a location for your feedback sessions

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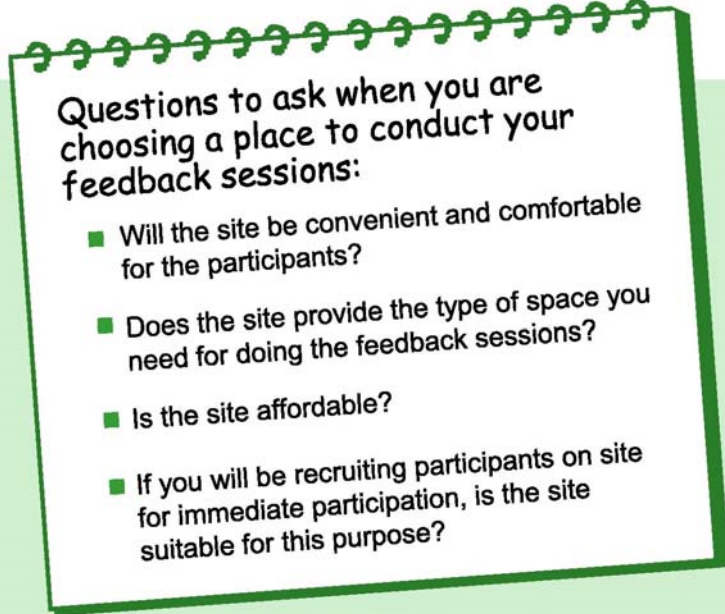
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This document is the thirteenth of 19 chapters in Part 6 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers 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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## Issues to consider when you are choosing a site

This chapter will help you choose a location that is suitable for conducting your feedback sessions with readers. It covers the issues listed on the right.



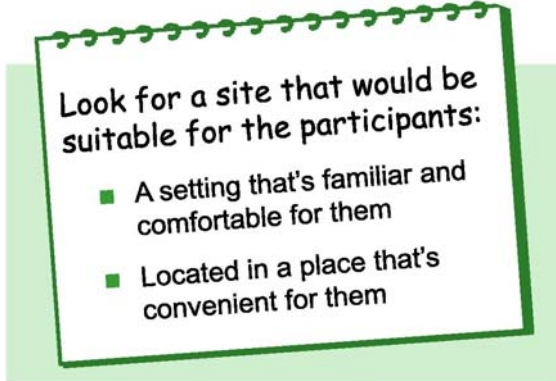
### Questions to ask when you are choosing a place to conduct your feedback sessions:

- Will the site be convenient and comfortable for the participants?
- Does the site provide the type of space you need for doing the feedback sessions?
- Is the site affordable?
- If you will be recruiting participants on site for immediate participation, is the site suitable for this purpose?

## Is the site comfortable and convenient for the participants?

It's very helpful to visit prospective sites in person to check on suitability. When you visit sites, think about their appropriateness and convenience from the *participants'* point of view.

Keep in mind that some settings that are familiar, comfortable, and convenient for you may be intimidating, inconvenient, or otherwise unsuitable for the participants you are trying to recruit.



### Look for a site that would be suitable for the participants:

- A setting that's familiar and comfortable for them
- Located in a place that's convenient for them

### ***Will the site put participants at ease?***

When you are choosing a setting for your feedback sessions, look for a “neutral” setting that will be familiar and non-threatening to participants. Choosing a site that is familiar and comfortable can make people more willing to participate and help encourage them to share their candid opinions. There are many possible settings to consider:

- **Community centers and other local organizations.** These local settings are often good choices. Private meeting rooms suitable for use in feedback sessions are often available at little or no cost in neighborhood centers, public libraries, community education buildings, and recreation centers.
- **The workplace, schools, housing complexes, and other everyday settings.** Places where people typically spend their time can be convenient and comfortable settings for feedback sessions. For example, you might do sessions with workers in a conference room at their office building, or the break room at their factory, or the staff lounge at their school. If your project is about written material related to Medicare, there are many good settings that are comfortable for older adults, including senior centers, meeting rooms in retirement communities, and settings where older adults do volunteer work.
- **Hospitals, clinics, and dental offices** can be appropriate sites for some projects.
- **State or county government buildings** are another possibility to consider.
- **Hotel meeting rooms and professional focus group facilities** are sometimes used for feedback sessions when budgets permit. They can work well if they provide a familiar and comfortable setting for your participants. For example, a professional research facility that is located in a familiar neighborhood shopping mall and has simple rooms may put people at ease, but one in an upscale office park may be too intimidating.

### ***Is the location convenient for participants?***

If you are going to do on-site recruitment, picking a site that is convenient is not an issue, since the potential participants are already at the site (see Chapter 15, *Tips for recruiting people on site for immediate participation in a feedback interview*).

But if you are recruiting in advance to set up appointments, where you hold the feedback sessions can make a big difference in people’s willingness to participate. Picking a location that people already know can make recruitment easier. When people are already familiar with a location, they are likely to feel more confident about traveling there without difficulty, and may feel more comfortable in the setting once they get there.

Here are some tips on choosing a suitable location:



### Take into account where your potential participants live and work

When the people you are trying to recruit are concentrated in a small geographic area, it is much easier to pick a location they will find convenient. For example, if you are recruiting people in a small town setting, any location in town may be relatively convenient for most people. But if your potential participants reside throughout a large urban area, the location you choose is likely to be convenient for some people and inconvenient for others.

Whether you should think of convenience in terms of travel time and effort from home or from work depends on who you are recruiting and when you hold the sessions. For example, if you are picking a site for focus groups with customer service representatives who work downtown, you will want to choose a downtown location if you are holding the groups over the lunch hour on a weekday. But if you are holding the groups on Saturday afternoon, you might want to pick a location that is outside of downtown, and closer to where they live.



### Take into account how your potential participants will travel to the site

To pick a convenient location, you need to know whether participants will be coming by car, bus, cab, specially equipped medical van, on foot, or other means. This will help you estimate the time and effort required for them to reach the sites you are considering.

If your participants will be driving to the site, check on the availability, convenience, and cost of parking. If you are recruiting older adults, such as people with Medicare, keep in mind that some of them may be reluctant or unwilling to drive into busy downtowns or other areas with heavy traffic.



Instead of asking them to come to you, can you go to where they are?

On-site recruitment is one possibility. As we have already mentioned, one way to make participation convenient is to go directly to a place where the type of people you are seeking for the feedback sessions tend to congregate, and then recruit them on site for immediate participation (for more about this, see Chapter 15).

Another option is to conduct your sessions at a site that is very near people's homes or at a place they are already planning to be. For example, the author did some group sessions in the meeting room of a high-rise retirement residence in Minneapolis in the middle of the winter. All of the participants lived in this same building. Even if there had been a blizzard that day, it would still have been easy for them to come for the feedback session, because the meeting room was right there in their building. Another example is to schedule feedback sessions to take place immediately before and after lunchtime at the local senior center, on days when people normally show up for lunch.

The ultimate in convenience for participants is to interview people in their own homes (provided that they are willing to have an interviewer come to their home). This can be a good choice if your participants have mobility limitations.


### ***Providing assistance and directions***

You may want to offer to help participants with transportation to and from the site where you will do the interviews or focus groups. You can reimburse their travel expenses, or you can provide transportation for them, such as arranging and paying for cabs to transport them to and from the site. Providing transportation may be a necessity for some types of participants, such as people who are physically frail or who have mobility limitations that require special assistance for safe travel.

If people will be taking a bus or driving their own car to the site, be sure to send them travel directions in advance. These should include a map with the details about bus routes or how to get there by car and where to park. It's important to test the map in advance to be sure that the directions are clear, complete, and accurate.

## Does the site provide the type of space you need?

When you have some sites in mind for your interviews or groups, visit them *in person* to see how well they will meet your needs. To decide whether a site is suitable, consider the size and flexibility of the space itself, the privacy it offers, and whether the setting might be noisy or have other distractions.

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- Look for a site that would be suitable for conducting interviews or group sessions:
- Has space you can use that is large enough and private enough
  - Has enough control over noise and other distractions

### ***Using a commercial research facility***

It is easy to conduct sessions at a commercial research facility because these facilities have been designed specifically for conducting interviews or focus groups. Typically, they include a reception and waiting area, discussion rooms and observation rooms, built-in capability for video and audio recording, good soundproofing, and convenient food or refreshment service. Facilities have staff available to handle recruitment and reminder calls, reception and check-in, refreshments, taping, and other services that leave you free to concentrate on just conducting the session itself. Since they offer tailored space and many services, commercial facilities are very convenient but also more expensive than other sites.

If you can afford a commercial facility, it can work very well for certain types of projects, such as projects that need to produce commercial quality video clips for presentations, or projects conducted at multiple locations around the country where it may be hard to develop the community contacts that you need to find alternative settings.

If you need to accommodate observers at your sessions, you may want to consider using a professional research facility that is designed for this purpose. In these facilities, the focus group room often has an adjoining observation room. Hidden behind a one-way mirror, this observation room allows a group of outsiders to observe the ongoing group discussion in a relatively unobtrusive way. Observers seated in the darkened room have a clear view into the focus group room, and microphones make it easy for them to hear what is said. The focus group participants see the reflective side of the one-way mirror. As long as the observation room is dark, participants cannot see the observers who are behind the mirror. Of course, the interviewer or focus group moderator would need to tell the participants that people are behind the mirror observing the session, but the concealment provided by the one-way mirror keeps the potential

distraction of observers to a minimum. For some types of projects and participants, this one-way mirror arrangement can work well, but for others, it is problematic. You will need to weigh the tradeoffs of the value of having observers present against the potential inhibition or discomfort that it may cause some of your participants.

While professional facilities offer great convenience, they may be too expensive to consider or unavailable in the area where you plan to hold your sessions. They may offer amenities that you do not need for your project, or the location may be inconvenient. Some professional facilities may be too intimidating for certain types of respondents.

If you decide to use a commercial facility, it's wise to visit in person to check on the ambience, choose which rooms you would want to use for your project, and have the opportunity to get acquainted with the staff and ask any questions you may have. It is much easier to size up a facility in person than over the phone.

### ***Using community-based organizations and other facilities***

If you are considering other types of sites, such as community-based organizations, government agencies, clinical settings, or residential facilities, you need to visit the potential sites in person. When you visit, talk with staff about your needs, and take a tour to determine what space would be available for you to use and whether it would meet your needs.

When you visit, be specific to help people at the site envision what will actually happen on the day of the sessions, especially if the idea of doing feedback sessions is something new for them. This will help prevent misunderstandings, and give staff a good basis for thinking creatively about how you can adapt and use their space to meet the needs of your project. Ask plenty of questions, and check out any assumptions you are making, keeping in mind that you will be a guest on their premises. For example:

- If you are recruiting by setting up appointments in advance, you will need a place to greet people and check them in as they arrive for the session. Will the community-based organization let you put up signs and a table and chairs in the waiting room?
- If you are doing same day on-site recruitment for immediate interviews, which areas will the organization let you use for approaching potential participants? Are there any ground rules that will apply? For example, if you are doing intercept interviews with people in a clinic or agency waiting room, you can agree to interrupt the interview when the person's name is called to see the doctor or caseworker.
- Whether you recruit ahead of time or on site, you will need space that offers enough privacy for the interviews or focus groups. You may also need a table or other suitable surface to spread out the written materials for people to see. Which rooms is the organization willing to give up on the



day of your sessions? Are they large enough and flexible enough to meet your needs? Is it okay to rearrange the furniture? Are there certain days of the week or times of the day that would work best for getting the space you need, or having better access to potential participants?

### ***Is there enough privacy and noise control?***

When you are conducting an interview or focus group, outside noise and other distractions can be a big problem, especially if you are taping the sessions, or you are working with older people or others who may have some hearing loss. Think about the provisions for privacy and noise control when you are evaluating possible sites for your sessions with readers. You may have some other needs as well, such as needing space that would work well for taping the sessions or accommodating observers.

Commercial facilities are generally very good on privacy and noise control, at least in their focus group rooms, and they may have built-in equipment for taping your sessions. If noise control is crucial for your project, it's worth checking on the soundproofing of the smaller interview rooms, which can vary a lot in commercial facilities. Remember, other projects may share the same space during the time you are there. If there's a market research study of TV commercials playing at loud volume in the small room next to yours, you will want something more than just a thin wall between you.

If you are doing your sessions at some other type of facility, provisions for privacy and noise control may vary considerably. An on-site visit will help you identify possible problems.

Sometimes, you may decide to sacrifice a certain amount of privacy or noise control in order to do your interviews or focus groups in a setting that makes people feel comfortable and at ease. For example, private homes can be noisy settings, but other considerations may override, such as cultural appropriateness and convenience to the participant.

Conducting an interview with children nearby can also be noisy. For example, the author and colleagues have done several projects at Medicaid eligibility offices that involved doing interviews on site with mothers accompanied by young children. We used a three-person team to recruit participants on site and conduct the interviews. One person was the interviewer; one took notes. We put a basket of toys in one corner of the interview room, and a third member of our team looked after the children while their mother was participating in the feedback session. With the children nearby, the mothers were more at ease and they could focus better on the interview. Having the children in the room was a bit noisy at times, but we felt that the mild distraction of this background noise gave us realistic circumstances for getting a busy mother's reactions to the written material we were showing to her.



## Is it affordable?

In this chapter, we've mentioned a broad range of possible sites to consider for your sessions with readers. The cost for using a site is a vital consideration, and may constrain the choices you can consider.

Fortunately, many of the community-based organizations that tend to work best for putting people at ease also tend to be less expensive. Some of these sites are free or very low in cost. When community-based organizations make their space available to you, it builds good community relationships to send written thanks after the feedback sessions have been completed. You may also want to offer a donation or gift as a thank you for their time and trouble in accommodating your project. If they assist you with recruitment, you will need to discuss possible compensation.

Professional research facilities cost significantly more than other settings. As you consider possible sites, take into account that using a professional facility gives you space that is designed expressly for your purposes, and that the fee for using this space includes professional expertise and administrative services that can save you a lot of staff time and effort.



## If you plan to do on-site recruitment, does the site work well for this purpose?

### ***Your recruitment strategy can affect your choice of setting***

What you look for in a setting for conducting your feedback sessions depends in part on the recruitment strategy you are using:

- If you are recruiting people in advance to come for a session later on at a scheduled time and place, any number of locations might be suitable, as long as they are comfortable and convenient for your participants and meet your needs for conducting the sessions.
- However, if you are going to recruit your participants at the site for immediate participation in a feedback session, there is more to consider. In addition to being suitable for participants and for conducting the sessions, the site must give you good access to the type of participants you want to recruit.

On-site recruitment means that you go directly to the location where you will conduct the sessions, and recruit people on the spot for immediate participation in a feedback session. If you are doing on-site recruitment, you need to find a site where the types of people you are seeking tend to congregate and linger, so that it's possible to recruit them to participate in an immediate interview.

Organizations you are working with on the project may be able to help you find an appropriate setting and get permission to use it for recruitment and interviewing on site. There are many possible settings that might work, depending on the type of participants you are seeking, the length and complexity of the interview, and the type of space you need. These include community-based organizations, government offices or agencies, schools, clinical settings, schools, health fairs, public libraries, lunch rooms or break rooms, day care centers, senior centers, retirement centers, and assisted living housing developments. For more on this topic, see the next two chapters (Chapter 14, *How will you select and recruit participants?* and Chapter 15, *Tips for recruiting people on site for immediate participation in a feedback interview*).

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