

# Pretest a Survey Questionnaire

UCLA CTSI Community Engagement & Research Program  
Partnered Research “How To” Series

## BENEFITS OF PRETESTING

1. Pretesting can detect potential problems with the survey, thus reducing errors in gathering and reporting of data:
  - Assesses appropriateness of survey (e.g., length, difficulty, and readability)
  - Ensures that questions included are sufficient to gather the necessary data
  - Helps to structure the survey (e.g., order of questions, transitions between sections, and skip patterns).
2. Pretesting can aid in predicting how participants will respond:
  - Assesses respondent interest, comprehension, and attention, fatigue or discomfort, and overall participant well-being while responding to the survey.
  - Helps predict future recruitment problems, response and retention rates.
3. Pretesting can help refine research protocols:
  - Provides estimates about the length of time required to administer the survey.
  - Evaluates appropriateness of mode of administration (e.g., phone, in-person, computerized).

## PROCESS\*

### 1 Produce a near-final draft of the survey

- To ensure that the survey is ready to be pre-tested make sure you:
- Have an introduction that adequately explains the purpose of the survey.
  - Adapt the questions to the community or clinical context where you will be administering the survey.
    - Consult with community members if project will be based in the community.
  - Finalize any **translations** if the survey will be conducted in more than one language.
  - Embed the appropriate skip patterns and response options.
  - Prepare all necessary materials that will accompany the main survey, including **consent forms** and recruitment materials.

### 2 Choose the pretesting method(s) that will best fit your study (see table).

Note: These can be used in conjunction with each other and in an iterative manner.

- Consult with your IRB to determine if you need prior approval for your chosen pretesting method.

**\*These guidelines are best for testing quantitative surveys, not for developing new instruments.**

## PRETESTING METHODS:

### RESPONDENT DEBRIEFING

Respondents (from the community where study will be conducted) are interviewed about their impressions of the survey.

**Pro:** Does not interfere with the survey-taking process.

**Con:** Respondents might not recall all items they struggled with.

### BEHAVIOR CODING

Observation of the interaction between respondent and interviewer.

**Pro:** Detects behavioral cues that signal problems during the question-answer process.

**Con:** Does not identify the exact problem with survey items.

### INTERVIEWER DEBRIEFING

Group discussions with Interviewers who will administer the survey.

**Pro:** Identifies challenging Questions.

**Con:** No input from potential respondents.

### EXPERT REVIEW

Review of draft materials by an expert.

**Pro:** Cost- and time-efficient.

**Con:** No input from potential respondents.

### FOCUS GROUPS

Small group discussions with members of the community where study will be conducted.

**Pro:** Useful when information about topic of interest is scarce.

**Con:** Requires well-trained moderators and qualitative researchers.

### CONCURRENT THINK-ALoud

Respondents answer the questions while providing comments on their impressions of each item.

**Pro:** Open format can provide rich information about items in the survey.

**Con:** Coding is labor-intensive. High respondent burden.

### PILOT STUDY

A small-scale version of the planned study (in the community or clinical context where study will take place).

**Pro:** Can test all field procedures.

**Con:** Requires resources (e.g., staff time, space).

- ### 3 Conducting the pretest
- Use the same mode of delivery that you will use for data collection (e.g., if main survey will be done online do not use a paper survey during pretest).
  - Pretesting should be conducted with respondents who belong to the community where study will take place (except for expert reviews and interviewer debriefing).
    - 5-10 participants should be selected.
    - OK to use convenience sampling.
  - Explain the purpose of the survey to respondents. Let them know you will assess their answers to the survey, as well as their understanding and impressions of questions in it.
  - Note all comments and questions posed by respondents.
  - Observe respondents for signs of hesitation and confusion while answering the questions.
  - Record how long it takes respondents to answer all questions.

- ### 4 Synthesize information
- Look for trends in responses to determine issues with particular questions or responses/response categories.
  - Analyze responses to determine if they are within the parameters of what is anticipated.

- ### 5 Revise materials and retest
- Use information from pretesting to make necessary revisions
    - Questions and response categories can be edited, removed, or combined with similar items.
    - Language may need to include more detail, be simplified, or be more explicit.
  - Major revisions may require consultations with survey development experts and retesting of the survey.

**Example of survey pretest in the safety net: CARE CONNECTIONS PROGRAM**— Evaluation of a Community Health Worker Initiative, a partnership between Los Angeles County Department of Health Services and UCLA CTSI/CERP

#### PRETEST PROCESS OF PATIENT REPORTED OUTCOMES SURVEY

##### Research Assistants (RA)

Three RAs tested the English versions of the survey.  
**Issue identified:** format of the survey was hard to navigate.  
**Changes made:** survey was reformatted.

##### Community Health Workers (CHW)

Survey was pretested with five CHWs who were working with patients.  
**Issue identified:** language was too complicated.  
**Changes made:** questions were simplified.

##### Field Interviewers

Two interviewer debriefings were conducted.  
**Issue identified:** survey length.  
**Changes made:** some sections were removed to shorten the survey.

##### Patients

Respondent debriefings were conducted with seven patients (4 in English, 3 in Spanish). Patients were recruited from 3 clinics that would be included in the study.  
**Issue identified:** patients preferred to complete the survey over the phone instead of in person.  
**Changes made:** survey was simplified so it could be administered over the phone.

##### Data Collection

Survey was finalized and data collection started

**CONCLUSION:** Pretesting will help identify problems with survey design, staff training, and logistic challenges that may occur during data collection. By pretesting the survey, we can learn how to address these issues before data collection begins.

#### UCLA CTSI Community Engagement and Research Program (CERP).

Develops, implements, and refines models of community engagement and community capacity building, and facilitates research collaborations between academics and community partners.

**Services:** Dissemination of research results ▪ Advice on study design and implementation ▪ Connecting investigators and community ▪ Grant preparation and training

Additional Resources on community engaged research:

<http://ctsi.ucla.edu/patients-community>

