

– A Technical Brief for Breakthrough ACTION Field Teams –

VIRTUAL PRETESTING DURING COVID-19

July 07, 2020

This Technical Brief presents workarounds—tips and tricks to use digital platforms—to conduct pretests virtually. In this document, two instances for virtual pretesting are presented: the development of SBC materials and the development of job aids. Both use similar processes, but with specific differences that are highlighted in this document.

This fact sheet was made possible by the generous support of the American people through the United States Agency for International Development (USAID). The contents are the responsibility of Breakthrough ACTION and do not necessarily reflect the views of USAID or the United States Government.

Introduction: Impact of COVID-19 on pre-testing social and behavior change materials

Stay-at-home orders and calls to halt all large gatherings¹ during COVID-19 has meant a change in the way training and social and behavior change (SBC) materials are developed, finalized, and even used. Pre-testing is an essential step in the development of SBC materials to assure that the materials will meet their objectives. Typically, materials are tested with in-person audiences and SBC practitioners in small groups and/or interviews. To understand the basics of pretesting communication materials, please consult [How to Conduct a Pretest](#).

All types of SBC materials can be pretested virtually - audio, video, and print materials. Testing materials virtually presents both challenges and opportunities. For example, feedback on materials may not be as robust as during a face to face pretest; however, turnaround time for results may be shorter.

The use of digital platforms such as WhatsApp, Zoom, or Facebook Live can facilitate the development and testing of content and visual images. The modest mobile phone can also be used to pretest content among populations without access to the internet. A radio PSA can be played over the phone, for example, and the caller can then administer the pretest questionnaire.

Why pretest during the pandemic?

SBC materials are regularly tested to assess clarity and comprehension and to ensure that they are culturally acceptable to the target audience. Pretesting ensures the materials (print, audio/video, web-based) are correct, concise, clearly worded, relevant, appealing, credible, and understandable and include a motivation for audiences to take action. Furthermore, pretesting can help ensure that materials are not reinforcing harmful gender norms or promoting inequitable gender stereotypes.

Draft job aids are also tested before finalization to be sure they include the requisite technical information that is easily understood, visually appealing, and user-friendly, and that health providers are motivated to use.

During a pandemic that is accompanied by an [infodemic](#), pretesting SBC materials is more important than ever to ensure the content and images are accurate and credible and will motivate the behavior changes needed to prevent the spread of the disease and mitigate its impact. With so much conflicting and ever-changing information, as well as the propagation of rumors and inaccurate information, pretesting is essential to ensure messages are perceived as credible.

¹ Depending upon the local country guidelines

Using Digital Platforms to Conduct Virtual Pretests

To conduct virtual pretesting, facilitators must ask themselves the following questions. The sections below provide answers to these questions and information on related topics.

How can I identify and recruit representatives of my intended audience?



How long should the questionnaire be during a virtual pretest?



How can I share the material I need to pretest with respondents?



How will I conduct the pretest; such as on which platform?



Pretest Methods

SBC programs should conduct pretests similarly to regular in-person pretests, using a combination of focus group discussions (FGD) and/or in-depth interviews (IDI), depending on the intended audience and the materials. Cell phones are more suited for in-depth interviews, while other virtual platforms can be used for IDIs and FGDs.



Identifying and Recruiting Pretest Respondents

During virtual pretests, all respondents must have a digital device (e.g., phone, computer, or tablet) and a means to connect using it (e.g., phone service to receive calls or text messages or access to the internet). Determining what is available to the majority of the intended audience will be key to selecting the mode of pretesting. Also, each respondent should be comfortable using technology for an extended period of time, as the pretest will take 10–45 minutes depending on the digital platform, communication material type, and length of individual discussions or focus group discussions.

Respondents for each interview or FGD should reside in one of the project implementation areas and will be selected based on a predesigned screening questionnaire. The informant criteria for a virtual pretest (e.g., age, sex, language spoken, and role in the household or community) might be the same as a traditional pretest yet also must account for the respondents' ability to participate virtually via cell phone or internet.



Identifying and Recruiting Pretest Respondents

(Continued)

To start identifying a pool of potential respondents, one can harvest telephone numbers of community members that have come into contact with your program at different points in time, such as attendance registers from relevant activities or membership in partner community-based organizations. Field teams can send an invitation to participate with a link to a screening questionnaire, based on the identified criteria or by calling respondents and asking the questions over the phone.

Virtual pretest groups should be no larger than five to eight people per group. Smaller numbers of respondents are preferred especially where there may be literacy or technological challenges. In this way the moderator or note-taker can assist the respondent if needed.

In addition to recruiting the respondents, recruiting individuals who serve as community health resources may be necessary for help in troubleshooting access to either the online pretest or the materials being tested. These individuals, who know the respondent, can call and provide technical support during the pretest. Community health actors might need to share internet credits to allow respondents to access the online pretest.



Providing the Materials

Unlike face-to-face pretests, respondents may need to receive the SBC materials to be virtually tested beforehand. Making things as easily accessible as possible is important. Those preparing pretests must reduce the digital size of the SBC materials to be shared. Respondents who cannot download the materials or who cannot see the materials clearly on their phones or laptops will not be able to participate. In some cases, moderators may be able to get hard copies to the pretest respondents via the District Health Office or local partner NGOs. These materials must be labeled, “Draft, For Pretest Only,” to discourage continued use or sharing of the pretest materials.



Developing the Questionnaire

Based on the objectives of the pretest, the questions will focus on the qualities² of the materials such as comprehension, pertinence, credibility, and call to action. However, those giving the pretest may need to modify the length of the questionnaire to accommodate its virtual nature. Virtual pretesting will likely be shorter than a normal pretest, as maintaining the respondents’ interest may be difficult over long calls or if internet connectivity is a challenge.

² <https://www.thecompassforsbc.org/how-to-guides/how-conduct-pretest>



Developing the Questionnaire (Continued)

Those designing the questionnaire must consider the following:

- How long are respondents willing to stay on a call?
- Does the questionnaire need to be shorter to maintain respondents' interest and comprehension of the purpose of the pretesting session?
- Do “yes or no” questions work best?
- Do scales (not at all, somewhat, perfectly) work in the respondents' context?

Programs may get better results by pretesting the questionnaire with audience representatives or colleagues; this allows a trial for question types and questionnaire length to see what works best for both the platform chosen and the audience.

Questionnaires need to be concise and use simple scoring. SBC implementers designing the questionnaire need to consider which priority concerns should be tested: comprehension, clarity, credibility, or pertinence. Questions should be listed in order of priority so interviewers can get through as many key questions as possible in case the pretest is cut short due to connectivity or other problems. Interviewers should plan to probe on the most important areas to gain a more in-depth understanding from the respondents.

Remuneration: Virtual pretest respondents may be given cash-equivalent compensation to cover the costs of data for the duration of their participation in the pretest. Usually this is about \$5 but will depend upon the context of the interaction. This can be offered as phone top up or data credit where available. The equivalent of transportation costs could also be offered. The amount given reflects the effort level of the respondent to reply; for example, a moderator might consider how many materials must the respondent review, or if the respondent is required to fill in a table and resubmit it.

Institutional Review Boards (IRB): A human subjects review will likely be needed from the sponsoring SBC program's institution and/or the country where the pretest is taking place. The program should check with its institution's ethical board and its in-country counterpart.

Technology: The choice of technology depends upon the respondents' access to the internet and phones/computers. FDGs can be used where respondents have the technology and “know-how” to join WhatsApp, Zoom, or FacebookLive group calls. Where bandwidth or technology is limited, interviewers can engage respondents one-on-one using whatever is suitable or convenient for the participant, such as a WhatsApp call, chat, voice notes, or a phone call.— Interviewers should identify whether the pretest respondent is with an individual who may help with technical issues. Troubleshooters may take the form of a family member or community health worker who can help manipulate the video conference link; alternately, someone might bring a hard copy of the material to the respondent. Whoever is helping the respondent needs to be able to remain appropriately physically distanced from the respondent and/or wear a cloth covering their nose and mouth. The respondent should be doing the same.

Example 1. Using Group Calls/Chat Applications (such as WhatsApp or Viber)

WhatsApp is an instant messenger application used to send multimedia messages which might include photos, text messages, videos, or audio, making it a great platform to obtain instant feedback. Viber is used in some countries in the same way. Both require the internet. These platforms also allow for making phone calls via Voice Over Internet Protocol; such phone calls can include multiple people on the same call.

Recruiting Respondents

Five to ten selected respondents who meet the predetermined criteria are invited to join a newly created pretest group on WhatsApp. The WhatsApp group is set up two days prior to the day of the pretest; here the moderator shares information reminding respondents of the purpose of the group, as well as information on the date, time, and duration of the discussion.

Sharing the SBC Materials

On the day of the pretest, the moderator sends out a reminder 30 minutes prior to the start of the discussion. Once it is time for the discussion, the moderator greets everyone in the group and explains the rules of engagement for the focus group discussion, highlighting the materials to be played or presented. This is followed by a series of questions that will be responded to via either chat or voice notes. Moderators should remind respondents that they are not to download the materials to other devices, since the materials are drafts and not finalized. Depending on the IRB requirements for ethical approval, noted above, moderators may need to obtain respondent consent before their participation, explaining that their responses will be kept confidential. This is true for all types of virtual pretests being conducted.

The moderator shares the first materials for discussion, then asks respondents to listen to/watch/view the material two times, requesting that the respondents indicate when they have done so.

After all respondents have completed material review, the moderator begins by asking respondents the questions from the interview guide pertaining to that material, as outlined in the pretest methodology. This process is repeated until all the materials have been shown or played, and the relevant questions have been asked and answered. Ideally a note-taker should also be available to assist the moderator in capturing feedback from the respondents.

Conducting the Discussion

The moderator should ensure that each participant provides feedback for each question asked. The moderator can replay or re-share the materials if that will enable the respondents to answer the question appropriately; however, each participant should already have a copy of the materials sent in advance. After all participants have responded, the moderator thanks them for their time and contributions, then removes respondents from the WhatsApp group. Each participant is given a top up credit to their mobile phone.

The same process can be conducted in one-on-one interviews. The interview team contacts the informant to make an appointment using a WhatsApp video call. SBC materials are sent by one hour minimum prior to the interview. The interviewer makes a video call inviting the note-taker and respondent to join the call and asks to record the interview. The interview takes 10–45 minutes depending upon the complexity of the material and the respondent's availability. The call can also become a text chat if the respondent is literate and the connection is slow or interrupted.

Challenges

Some challenges may arise, including poor internet connection during the interview, noise from surroundings, or materials that are too large to be seen well on phones. As a result, the interview may need to be truncated or postponed.

Example 2. Using video conferencing

To conduct a pretest via a video conferencing application (such as Zoom or GoogleMeet), facilitators should identify a video conferencing tool that does not consume high volumes of data, is easy to navigate, and can accommodate video participation from a minimum of seven people at the same time (five respondents, one note-taker and one facilitator). For the purpose of this example, Zoom will be used as the case application as it works well in low bandwidth settings.

Recruiting Respondents

The moderator for this group sends out an email to potential respondents, introducing the pretest activity, detailing the purpose as well as how their email address was obtained. A link is embedded in the email to the screening questionnaire and eight to ten qualified respondents are chosen and contacted to be part of the pretest exercise. Respondents are encouraged to ask for assistance if they are not yet familiar with the video conferencing platform.

Testing the Platform

The moderator should send an email or SMS to all respondents with the link to the virtual meeting room (time and date of the pretest call), as well as information on how to use Zoom. The email or SMS will also detail information (date and time) about a test run call on Zoom to ensure that all respondents are

conversant with the application and are able to use it prior to the pretest. In the case where the audience members are not familiar with Zoom, moderators may wish to set up a quick training.

Sharing the SBC Materials and Conducting the Discussion

Similar to the WhatsApp group, the moderator will send a reminder email and text message to respondents 30 minutes prior to the time of the pretest call. About five minutes prior to the start of the call, the moderator logs into Zoom; once all respondents are logged on the call, the moderator greets respondents, informs them that the session will be recorded, and then proceeds with the pretest as outlined in the pretest guide. The moderator shares their screen and plays the material for pretest two times, then un-shares their screen, and then proceeds to ask the questions in the guide. The moderator should urge participants to respond to every question, reminding them that they can ask for the material to be replayed if necessary. The note-taker captures the responses. Depending on the IRB requirements for ethical approval, noted above, moderators may need to obtain respondent consent before their participation, explaining that their responses will be kept confidential.

Upon completion of all questions in the pretest guide, the moderator thanks respondents for their time and contribution, then ends the call. The moderator also sends the suggested mobile phone top up to respondents.



Photo credit: [Edward Jenner](#) from [Pexels](#)

Case Study 1. Testing Job Aids for Service Providers

The Nigerian Urban Reproductive Health Initiative 2 (NURHI 2) project used WhatsApp to pretest a new job aid that provides information on integrating family planning (FP) along the Reproductive, Maternal, Newborn and Child Health (RMNCH) continuum.

The project team, with service delivery partners and a graphic artist, developed a job aid for frontline healthcare workers and wanted to get feedback from the providers before finalizing it. The project developed a pretest response guide and shared it with FP service providers to collect responses to the following questions:

- Content of the job aid: Do you understand the content/information? (Yes/No) If not, please suggest what needs to be added or removed.
- Layout and position of the elements: What can you say about the presentation/layout? Does the position of each element convey the importance of FP integration?
- Colors: What do you think about the colors used to describe the elements?
- And, finally, ideas for improvement: What can be improved upon?

Timeline to Get Feedback

The draft FP Integration Chart was shared with existing WhatsApp groups of FP service providers with a request for them to provide feedback within the course of one week. By giving them a week to reply, respondents had time to both download materials if they had slow connections and provide thoughtful responses. A moderator was available throughout that week to provide clarification as needed to the respondents. NURHI 2 felt that providers needed a short deadline to maintain interest in the job aid development process.

How the Information was Analyzed

The number of respondents and responses per state were analyzed easily using Microsoft Excel. Analysis was based on the themes developed in the guide. The pretest was conducted with a total of 223 FP providers, over 60% of whom responded to the pretest questions.

This methodology was effective because respondents had the opportunity to provide feedback in real time, at their convenience and did not need to travel to a location for the pretest; meanwhile, facilitators could collate responses easily.

Challenges

Some participants had a poor internet connection and were not able to provide feedback. Further, some respondents were unresponsive, so the project followed up with phone calls to obtain their feedback.

Feedback to respondents

The project thanked FP service providers for their feedback and informed them about the timeline for accessing the final copy of the document.



Photo credit: NURHI Photo Gallery, Nigeria: A view of the entrance to the family planning unit, after a make-over repair by NURHI at centre Igboro health facility in Ilorin in Kwara. November 6, 2012. <http://www.nurhitoolkit.org/photo-gallery/ilorin-photos-speak>



Virtual pretesting compared to in-person pretesting

Ultimately, conducting virtual pretesting can be a time and money saver and provide rapid turnaround. In a pandemic like COVID-19, being nimble and moving quickly enables SBC materials to be ready in record time. However, there may be tradeoffs between the depth and breadth of feedback on the materials. If respondents are not comfortable with the electronic platform or have a poor phone connection, this can affect the pretest results. Conducting pretests virtually requires program staff to step in to help with troubleshooting, find ways to share the materials, and identify audience members to participate in the pretests.

One of the unexpected benefits of conducting the virtual pretest is projects can use them to build goodwill with the local Ministry of Health and the other COVID-19 Risk Communication and Community Engagement (RCCE) partners. This is because the virtual pretest is a means to continue regular health activities during the pandemic, get messages out quickly, and provide concrete inputs to maintaining the health status of populations affected by COVID-19.

Recommendations

- 1. Use existing groups:** By starting with an *existing* WhatsApp group, members need less time to establish trust between themselves, respondents show less reluctance to join the activity, and more people are available to help explain the process. Recruitment is easier.
- 2. Document size:** When sharing materials, facilitators need to remember to reduce the file size so the materials can be downloaded quickly.
- 3. Short turnaround time:** For SBC materials, feedback can be in real time; for a job aid or similar documents, the deadline for feedback should be no more than a week to avoid losing respondents to other activities.
- 4. Engage a moderator:** In some settings, like the job aid pretest, a moderator can help clarify questions and comments and ensure open communication to increase transparency; they can also troubleshoot technical problems and, on some platforms, remind participants of the purpose of the chat link.

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Materials

- [Covid communication network](#)
- [NURHI Guide to Virtual Pretesting](#)
- [NURHI Pretest Guide for Radio and TV Spots: Questionnaire](#)
- [West Africa Breakthrough ACTION Questions de pretest and Rapport des pretests des spots radios \(in French\)](#)

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