

## **What is pilot testing?**

Basically, pilot testing means finding out if your survey, key informant interview guide or observation form will work in the “real world” by trying it out first on a few people.

## **Why pilot test?**

The purpose is to make sure that everyone in your sample not only understands the questions, but understands them in the same way. This way, too, you can see if any questions make respondents feel uncomfortable. You’ll also be able to find out how long it takes to complete the survey in real time.

## **When to pilot test?**

Once you have a version your project is happy with, but before training your data collectors about how to administer it. (During data collector training you will want to conduct another type of test – a field test. In that case you are testing your team, rather than the instrument. But that is another story...)

## **Who to test it on?**

People that represent the various subgroups within your intended sample. Remember, you want to make sure that everyone will understand your data collection instrument in the same way. So if you plan to conduct a representative public opinion survey, you might want to include both old and young people, well-educated and less educated, native English speakers and recent immigrants in your test sample. At a minimum, involve several people from each subgroup so their views can be confirmed by others.

## **How to conduct the test?**

There are a number of ways to find out how people are understanding the data collection instrument.

### ***Retrospective Interview***

1. Administer the survey in the same way and under similar conditions as you plan to do for actual data collection. Record the start and end time so you can tell how long it took to complete each survey.
2. Pay attention to instances when respondents hesitate to answer or ask for clarification, as this may be an indication that questions or answers are too vague, difficult to understand or have more than one meaning. Make a note of where this occurs.
3. After the respondent finishes the survey, explain that you’d now like to ask how s/he understood each question and response choice. Go over the survey again, and for each question, have the respondent tell you what s/he thinks is being asked. Based on your observations, ask about instances when the person hesitated or needed clarification. For example if they struggled with the

question, “How many adults live in your household?” they might explain: “I was counting 5 adults, but I wasn’t sure whether I should say 5 or 6 because I also have an uncle staying with us occasionally and I didn’t know if that counted as a person living in my household or not.” You could follow by asking about wording that would have been clearer.

4. For questions with multiple response choices, ask if there are any other choices that should be listed. If there is a question where a number of respondents specified an “other” answer, see if what they said is a more likely response choice than the ones you provided.
5. You might also look into the cultural sensitivity and relevance of the survey by asking if there was anything objectionable in the survey, or if any of the examples in the questions were not relevant or appropriate for their culture. You might also ask if the sequence of the questions either encouraged or discouraged their desire to continue with the survey.
6. The feedback on the instrument can be done by asking one respondent at a time or by conducting a focus group with the participants in the pilot test. Just as with the individual respondents, ask every member of the group to tell you in their words what each question was asking and why some may have stumbled over any of the questions. Together, the group can come up with possible alternatives question or answer wording.

### *Think Aloud Interview*

Tell the respondent to talk through their thinking process while they are trying to answer each question. For instance, in response to the question: “How many adults live in your household?” someone’s “think aloud” answer may be: “Let’s see, there is Tony, Maria, Arturo, and Vera, oh wait, Vera is only 17, so I guess she doesn’t count as an adult yet, so Tony, Maria. Then we also have my parents living with us, so that makes an additional two. Well, then there is my uncle, he comes by a few times a week and sometimes sleeps at our house, so I am not sure if that counts or not. So, if I don’t count him, it’s Tony, Maria, my parents, and myself, that makes 5. If I count my uncle, it’s 6.

[The answer is an indication that the question needs to be slightly changed, for instance “How many adults live in your household permanently, not counting those who stay occasionally?”]

### *Debrief and Revise*

After pilot testing the instrument on a number of people, debrief with your surveyors to look for patterns in the feedback. Did several encounter the same hesitations, requests for clarification, suggestions for different wording? Use this data to revise the instrument. Then field test the revised version before starting actual data collection. Remember, this process is critical as it can minimize measurement error.

One last thing: When reporting your results, make sure to mention that you performed a pilot test and describe how you did it. This gives your instrument more credibility.