Pilot Testing: No License Required

Pilot testing. It's probably in your evaluation plan, but what does it involve? Don't worry, you won't have to get in the cockpit of a plane and no pilot's license is required!

Make a test flight of your tool before take-off

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. In this way, you can make sure that everyone not only understands the questions, but understands them in the same way. It gives you the chance to see if any of the questions make respondents feel uncomfortable. You'll also be able to find out how long it takes to complete the survey in real time.

So, here's how you might go about pilot testing a survey.

- Find four or five people similar to the population you plan to survey, and conduct the survey in the same way and under similar conditions as you are planning.
- Time the length of each survey completion.
- Pay attention to instances when respondents hesitate to answer, as this may be due to the way either the question or the response choices are phrased. Note where they ask you to repeat something or to provide clarification. This, too, may be an indication that questions or answers are too vague, difficult to understand or have more than one meaning.
- 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. For questions with multiple response choices, ask if there are any other choices that should be listed. In particular, ask about instances when they hesitated or needed clarification.
- You might also look into the cultural sensitivity and relevance of the survey by asking if there was anything objectionable, 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.

- When finished with this process, read over the notes you have taken and find the questions or answer choices that may need rephrasing or changing.

- 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.
- The feedback on the instrument can be gathered by asking one respondent at a time or by conducting a focus group with the pilot test participants. 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 suggestions for more appropriate question wording or response choices.

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. Performing a pilot test gives you the certainty that your data actually represent what you think they do rather than a misunderstanding of the questions or response choices.

Photo by Gerard Stolk and Robin Kipke