Pretesting – an early stage in item development that is used formatively to improve item writing and structure; an informal process

1. Review by knowledgeable colleagues and methodologists
2. Interviews to evaluate the cognitive and motivational qualities of the items; could include think-alouds or just simple interviews with people
3. A small preliminary pilot
4. A final check, edit, proofing

Guidelines for pilot testing; a more formal process for large scale surveys

1. Anticipate actual circumstances
2. Have the entire survey system ready to operate, from invitation, to data collection, to reminder, and data management
3. Choose a sample of the target population, 30 is usually sufficient
4. Otherwise, enlist as many people as reasonable
5. With the pilot results:
   1. Focus on the clarity of the questions and consistency of responses – estimating reliability
   2. Confirm that the multiple-choice options are exhaustive – looking to see if “other” options were offered
   3. Look to see if there is variability in responses
   4. Carefully consider responses to the final CR question – are there other things participants introduced that you might want to address in the survey
6. Consider how sources of survey error have been minimized
   1. Item quality indices – some stats
   2. Consider coverage challenges, particularly with online surveys
   3. For online surveys, consider the role of computer literacy
7. Work with a team to review the results of the pilot