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**CERTIFIED PUBLIC MANAGER PROJECT**  
**EDUCATIONAL MATERIALS REVIEW**

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**STATE DOCUMENTS**

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**February 12, 1998**

  
2-12-98  
Interim District Health Director

## **CERTIFIED PUBLIC MANAGER PROJECT GOAL**

Federal and state agencies rely on printed materials and audiovisual aids to tell people about health information and social services. In an effort to assure for the content accuracy and culturally acceptability of materials, the Department of Health and Environmental Control established in August of 1997, a policy for educational materials review. (Attachment 1) Guidelines for implementation of the policy were set forth by the Executive Management Team. At the District level the Health Director is to appoint a member of the staff to coordinate the implementation of the policy including written procedures and guidelines.

The goal of this project will be:

1. Establish an Educational Materials Review Committee at the District level, representative of the disciplines and programs in the District by March 30, 1999.
  - A. Develop the process by which materials are submitted to the DMRC for approval.
  - B. Develop appropriate review criteria by which the materials will be evaluated.
  - C. Design the process by which materials, once approved, will be made available to staff.

## **PROBLEM STATEMENT**

The agency educational materials review policy was established to ensure that educational materials used and distributed by DHEC staff to clients communicated clear and consistent information for different audiences and that the materials were targeted for the intended audience and setting. Educational materials distributed by the agency are intended to increase awareness, knowledge and the skills level of the reader, in order to alter or change a specific behavior.

The Executive Management Team, following the agency's commitment to Local Solutions to Local Problems and Customer Service (as referenced in the Strategic Plan), has provided guidelines for implementation of the materials review process, but the actual procedure of how to do, when to meet, how to notify staff about the approval process, etc., goes to the local district. At the District level the Health Director is to appoint a staff member to coordinate the implementation of the policy including written procedures and guidelines. Upon finalization of the procedures for reviewing educational materials at the local level, the procedures will be kept on file in the district headquarters. Although various program materials review processes exist, there is currently no inclusive review process which covers all areas in the district. The value of customer service is one of the most important values in the agency and the relationship between educational materials and customer service is clear. Because of the large volume of materials that are used in the district, the opportunity exists for materials to be distributed that are not appropriate.

## CAUSE ANALYSIS

The policy set forth by the Executive Management Team to establish a review process for all educational materials was clear. What needed to take place at the district level was "How do we do this?"

Educational materials cover all areas of health, including communicable disease, nutrition, personal hygiene, disease specific content areas and behaviors. Content experts would be needed to verify that the information in each piece of material was correct. Most materials are written at a 10th grade reading level and above. According to the 1992 National Adult Literacy Survey, about 47% of the U.S. population demonstrates low levels of literacy (Kirsch, 1993). The criteria for a materials review process is multifaceted and includes broad topic areas such as organization, writing style, appearance, appeal. Is the material culturally and age appropriate? Does the piece of literature match as closely as possible the logic, language, and experience of the intended audience? Are there illustrations to amplify the text? What about technical jargon? There should be little or no technical verbage for a pamphlet to be used in the general setting. Verbage in the pamphlet should also not be offensive or be based on street language. The writing should be interesting with a friendly tone that invites interaction such as further questions, or a suggested action. Desired behavior changes for improved health status are clearly stated.

The agency is currently using several different forms to gather this data. One of the challenges for the District Materials Review Committee will be to evaluate these documents and design or adapt a document for use in the Catawba District. Then, once the educational material is evaluated staff need to be informed as to the availability and suggested use of the material.

#### ANALYSIS:

##### STEP I:

The District Materials Review Committee (DMRC) made up of staff with a variety of backgrounds including health education, nursing, social work, nutrition, environmental health and administration currently evaluate educational materials but without a formal tool. Materials are submitted to the committee through the Chair. Materials could be reviewed at this point or in advance by a staff member with expertise in the content area. Comments are then submitted to the Chair.

The materials are discussed by the committee members and verbally approved.

This process allows for inconsistency by being subjective and having no criteria. It should be pointed out, however, that Catawba District has something in place for materials review, a starting point if you will.

Step II: A tool to evaluate educational materials must be user friendly and self explanatory for the staff person evaluating the material. Because the members of the DMRC come from different professional backgrounds, the review document

must be straight forward to assure consistency and end with a recommendation to use or not use based on sound scientific educational principles. The document used to review the material must address the following: readability and appearance, ie. , reading level (grade), accuracy of information, cultural sensitivity to different population groups, intended messages, cost, availability, ie. , available through another state agency or national organization, and end with a recommendation to use or use with suggested revisions or not to use. A survey to gather examples of various ways to review materials was conducted by the DMRC of the program areas in the agency and other districts. At present, 12 different materials review forms were gathered by the committee. Examples of four of those forms are attached. (Attachment 2 a,b,c,d)

Office of Public Health Nutrition

HIV/AIDS Program Review

Information and Education Committee - S.C. Statewide Family Planning Program

Checklist for Evaluating Educational Materials

Step III:

The attached chart (Attachment 2) examines the review forms that were submitted for the areas determined by the DMRC to be important in a review process for Catawba District. Although most of the criteria were included in all the forms submitted, the DMRC desired to design the form with a specific flow

questions together and allowing space for comments by the reviewer. It was also desirable that the review process be simple and quick. The key areas agreed to after reviewing the submitted forms and looking at a design are as follows:

Easily Understood

Accuracy

Target population relevance

Appeal to the reader

Grade level for reading

Visual Impact

The following goal was established after reviewing the forms and deciding on the criteria for a District specific form:

To collect basic information about educational material and use appropriate questions to review the material in a simple easy-to-use format.

This process will be conducted by the members of the committee, individually, using the review tool developed. Each new piece of client education literature will be reviewed in this manner.

Step IV:

The DMRC with the concept of a review form and process in place to review educational materials, needed to test the review process to assure for a smooth transition from the DMRC simply looking at materials during a committee meeting to actually approving materials using a tool. This review process is very

~~meeting to actually approving materials using a tool. This review process is very~~  
important and assures that printed material as well as audiovisual material used by  
agency staff for client education meets a professional standard. The process for  
submitting material to the committee and the Checklist for Evaluating Educational  
materials is presented.

### **IMPLEMENTATION**

During bimonthly staff conferences all staff will be informed about the process for  
submitting materials to the DMRC. The Materials Review Process for the District  
will also be distributed to staff through the district newsletter. Over the next year,  
the DMRC will meet every other month (January, March, May, July, September,  
November) and using the tool developed, evaluate materials submitted.

Anticipating communication will not always be the best, staff will learn of  
approved materials by having them listed and displayed in the monthly district  
newsletter. Decisions for review of the materials and to use or not are not based  
on a subjective review of the material but on sound scientific educational  
principles. At the end of this first year, March of 2000, the operation of the  
committee including the tool used to review educational material will be evaluated  
to determine if the review tool has met the goal developed earlier in the year and  
the process used to evaluate material meets the need of the staff providing direct

and maintain a list of all approved materials. This list will be displayed in the stockrooms where materials are stored. The Chair of the Committee will be responsible for assuring this task is completed. Other than staff time and travel costs incurred for members to attend committee meetings, there is no outside cost for implementation of this program. The credibility, reliability and acceptance of the review process by staff members of the District rests on an accurate review of client literature and then communicating information to the staff. To reiterate once again the agency's commitment to local solutions to local problems and customer service, the District has assumed responsibility for implementation of the materials review process recognizing that both internal and external customers are integral to its success.

## SUMMARY

The purpose of this project was to develop a professional standard in the district by which to evaluate educational materials distributed by the agency to the public, following the guidelines set forth by the Executive Management Team of the Agency. The current process of materials review allowed for subjectivity and was managed by one staff person. Although this process had been used for many years and appeared to be working well, what would happen when this staff person resigned or retired. The District needed a formal process and procedures to implement the Agency Policy to review educational materials. Throughout this

project, the DMRC (with District Management Team representation) was involved in all decisions for determining the way the district would evaluate materials. The DMRC will be responsible for implementation of the Educational Materials Review Policy for Catawba District. Evaluation of the process a year from this point will be based on the following criteria:

1. Committee meets bimonthly and minutes are recorded and shared.
2. Titles of approved materials are printed in the district newsletter and shared with staff during staff conferences.
3. A comprehensive list of approved materials is available in the various literature stockrooms.
4. The committee will re-evaluate the "Checklist for Evaluating Educational Materials" to ascertain if the form continues to meet the needs of the district.

The District Materials Review Committee process and procedures have been approved by the District Management Team.

# Catawba District Materials Review Committee

## Role of the Education Materials Review Committee

1. Develop procedures regarding the use of educational materials by staff in the district.
2. Preview for use in the district all educational materials distributed through the Educational Resource Center (ERC) in Central Office or previously approved by a Central Office program or division.
3. Make recommendations to the district health director for the approval for the use of the educational materials not accessible through DHEC's ERC or previously approved by the Central Office programs or divisions.
4. The chair of the Education Materials Review Committee will be the district director of health education.
5. The Education Materials Review Committee will meet bimonthly to review materials for use in the district. (In the event of need for immediate response, the DDHE will assume authority for approval to DHD).
6. Membership will be representative of the district and approved by the discipline director.
7. A collection of all approved educational materials used within the district will reside in the Office of Health Education.

Process A (for all materials developed by Catawba District staff)

1. Any staff developing materials should assess what is currently available to avoid duplication of materials.
2. Identify intended audience and key message.
3. Inform program manager of the need and topic to be addressed.
4. Acquire programmatic input for content accuracy.
5. Develop a draft of the material.
6. Spell/grammar check the draft.
7. Send 10 copies of the draft to the chair of the Education Materials Review Committee (DDHE) with a note of intended audience and use.
8. Materials will be reviewed by the DDHE in the order received. A) If acceptable, recommendation to approve will be made to DHD with recommendations for format. B) If not acceptable, material will be returned to developer for corrections, etc., to be resubmitted to committee.
9. Upon DHD's approval/disapproval, notification will be sent out by the committee to the developer re: use of the material.
10. DDHE is responsible for proceeding with request for production (ie, print shop, work order, etc.). DDHE will provide copies of completed material to developer when received. Material will also be stocked in health education materials room.

## Checklist for Evaluating Educational Materials

On a scale of 1 to 5, indicate the extent to which the criteria are met, with 5 being "totally met" and 1, "not met at all". Under each heading question, there are specific "yes" or "no" considerations to help you rate the heading question.

The first four headings apply to all of the materials for review. Then printed materials and audiovisual materials each have two additional headings to consider, for a total of six areas. Use the appropriate additional questions (printed materials or audiovisual materials) to add to the numbers from your first four ratings for a total score.

**Title of material:** \_\_\_\_\_

**Grade level:** \_\_\_\_\_      **Intended audience:** \_\_\_\_\_

**For all materials being reviewed:**

1.      Is the message of the item easily understood?      1      2      3      4      5

Consider:

Is there a central theme, one main idea to the material?      Yes      No

Is the language used familiar to the target group?      Yes      No

Is the presentation simple and concise?      Yes    No

Is there reinforcement of the main idea?      Yes    No

2.    Is the information accurate?    1      2      3      4      5

Consider:

Is it current?    Yes    No

Are any medical/technical term explained?    Yes    No

Does the material refer the learner to sources of further information?      Yes    No

3.    Is the information relevant to the target group?      1      2      3      4      5

Consider:

Does it reflect their values, lifestyles, education, and culture?      Yes    No

Does it reflect their concerns?      Yes    No

4.    Is the presentation appealing?      1      2      3      4      5

Consider:

Is information made interesting?      Yes    No

Is the amount of information appropriate, not  
too much or too little for the purpose?      Yes    No

**Additional consideration for printed materials:**

5.    Is the reading level suitable (usually 8th grade or less)?      1      2      3      4      5

Consider:

basic, simple words? Yes No  
 simple sentences? Yes No  
 use of active voice? Yes No  
 use of personal "you" instead of third person? Yes No  
 logical sequence to information given? Yes No  
 pacing of factual matter to avoid overload? Yes No

6. Is the visual impact satisfactory? 1 2 3 4 5

Consider:

simple typeface? Yes No  
 appropriate illustrations? Yes No  
 use of bold or shading to emphasize important ideas? Yes No  
 use of spacing for emphasis and clarity? Yes No  
 paper and ink that enhance the message? Yes No

**Additional considerations for audiovisual materials:**

7. Are the audiovisual materials "user friendly"? 1 2 3 4 5

Consider:

Is the usage self-explanatory? Yes No  
 Are there any accompanying instructions for using the item? Yes No  
 Does the presentation provide or suggest further activities for reinforcing the message? Yes No

8. Are the situations depicted realistically? 1 2 3 4 5

Consider:

For videos/films are appearances current and not conspicuously dated? Yes No

Are any solutions to problems realistic for the target audience? Yes No

Is the item easy to watch/listen to (quality)? Yes No

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Total points: \_\_\_\_\_

Decision:

\_\_\_\_\_ Use as is (25-30)

\_\_\_\_\_ Needs revision (15-24)

\_\_\_\_\_ Rejected (fewer than 15 points)

Name: \_\_\_\_\_

Comments: \_\_\_\_\_

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CPHD/Evalform 1/99

## Department of Health and Environmental Control

### Educational Materials Review Policy

**Subject:** Agency Educational Materials Review

**Policy Statement:** It is Agency policy that a review process for educational materials, both print and audiovisual, be utilized following guidelines listed below as established by the Executive Management Team. This policy is established to ensure that educational materials used and distributed by DHEC staff communicate clear and consistent information for different audiences and are targeted for the intended audience and setting(s). This process should include a committee review format.

**Rules:** Agency educational materials must convey appropriate public health and environmental messages, be culturally sensitive to the targeted customer groups and must not duplicate existing agency materials.

An Educational Materials Review Committee will be established and maintained at the District or Central Office Bureau level. Membership will be representative of the bureau or district staff and approved by the central office Bureau or District Management Team.

Appropriate criteria regarding the review and use of educational materials will be used by the Committee as approved by the Bureau or District Management Team.

**Guidelines:**

1. At a minimum, preview for use, all educational materials **NOT** distributed through the Educational Resource Center (ERC) in Central Office or previously approved at the Bureau level in Central Office within the last three (3) years.
2. Make recommendations to the District Health Director or Bureau Director for the approval of educational materials not accessible through DHECs ERC or previously approved at the Bureau level in Central Office.
3. Meet on an appropriate frequency to meet the need for reviewing materials to be considered for use and to review existing materials for revision or deletion with a three year expiration date on all materials to ensure appropriate and timely revision of content.
4. The review committees should avoid approving educational materials which duplicate existing materials. Existing materials on a topic should be considered first before purchasing or producing new materials. If the existing materials do not fit the need, the program responsible for the material should be notified to see if a revision can be made.
5. Maintain a collection of all approved educational materials used within the central office bureau or district.
6. Forward a copy of materials approved by the central office bureau or district educational materials review committee to the ERC for cataloging purposes

7. Utilize criteria for approving materials to include the appropriateness of the intended message, accuracy of the information, reading level, cultural sensitivity to the intended audience, format, need, and cost.
8. Selected educational materials developed for specific audiences should be periodically pre-tested utilizing appropriate testing methods. The purpose is to obtain feedback regarding the comprehension and appropriateness of the public health and environmental messages for the intended audiences.

**Procedures:** The Bureau Director or District Health Director will appoint a member of his/her staff to coordinate the implementation of this policy in the district. Upon the finalization of the implementation procedures for reviewing educational materials, the procedures will be kept on file in the bureau office or the district headquarters for information.

**Responsibility**

**Action**

**Coordinator of Review Committee**

Must ensure that materials submitted are reviewed using the appropriate criteria as approved by the Bureau or District Management Team.

Must ensure that procedures by the committee are developed, approved by the Bureau Management Team or DMT and followed by the Committee.

Must ensure that recommendations are made as to the disposition of all materials submitted for review.

**Bureau Director or District Director**

Must ensure that an educational materials review committee and procedures are operational in the bureau or district. Ensure that the procedures are maintained on file in the district or bureau office.

Office of the Commissioner  
 Communication Resources Division  
 08/15/97

**Attachment 2**

	<b>OPHN</b>	<b>HIV</b>	<b>I&amp;E</b>	<b>Checklist</b>
<b>Easily Understood</b>				
<b>Accuracy</b>				
<b>Target Population Relevance</b>				
<b>Appeal to the Reader</b>				
<b>Grade Level</b>				
<b>Visual Impact</b>				

## Checklist for Evaluating Education Materials

- Who is the target group?
- What do you want the target group to learn from the material?
- Is the information ACCURATE?
  - Is the information current?
  - Is it concise?
  - Is it as unbiased as possible?
- Is the information RELEVANT† for the target group?
  - Does it reflect the values, lifestyles, and culture of the target group?
  - Does it reflect their concerns?
  - Will the target group UNDERSTAND† it?
  - Is it at their reading level?
  - Does it use their language or language that is familiar to them?
  - Is all the technical and medical jargon explained?
- Will the target group WANT† to look at it?
  - Is the layout attractive and effective?
  - Is the print large enough? Is it easy to read?
  - Are the illustrations appropriate for the target group?
  - Are the referrals current and appropriate for the target group?
  - Is it too long? Is there too much information?
  - Will it grab the target group's attention?
- Will its language or its illustrations OFFEND the target group?
  - Is it racist?
  - Is it sexist?
  - Is it homophobic?
  - Is it coercive?
  - Is it judgmental?
  - Is it sensitive to the values and culture of the target group?
- Does the material direct the target group to an easily accessible, appropriate source for more information?

- To verify the accuracy of information,, consult reliable and knowledgeable resources, such as officials and researchers at state or local health departments, health car workers, AIDS educators, research centers or hospitals, and articles in medical and health journals.
  
- † The best way to verify relevance, appropriateness, and attractiveness of the materials is to pretest them with members of the target groups; pretest materials in focus groups or by informally talking to members of the target group in waiting rooms, stores, shopping centers, community centers, churches, ect.

SC DHEC HIV/STD Program  
Federal HIV/AIDS Program Review Panel

Name of Organization \_\_\_\_\_  
Title being reviewed \_\_\_\_\_

1. Does this program's overall material include information about the risk of unprotected sexual activity and intravenous substance use?

\_\_\_\_\_yes \_\_\_\_\_no

2. Does this program's overall material include information about the benefits of abstaining from unprotected sexual activity and intravenous substance use?

\_\_\_\_\_yes \_\_\_\_\_no

3. In your opinion, does this particular material directly promote or encourage sexual activity or intravenous substance use?

\_\_\_\_\_yes \_\_\_\_\_no

If yes, please explain: \_\_\_\_\_

4. What is the intended audience? (Check all that apply.)

- \_\_\_\_\_ Men who have sex with men - gay identified  
 \_\_\_\_\_ Men who have sex with men - not gay identified  
 \_\_\_\_\_ Injecting drug users  
 \_\_\_\_\_ Substance abusers  
 \_\_\_\_\_ Women who have sex with men  
 \_\_\_\_\_ Women who have sex with women  
 \_\_\_\_\_ \* Youth at risk, specifically:  
     \_\_\_\_\_ sexually active youth  
     \_\_\_\_\_ substance abusing youth  
     \_\_\_\_\_ other \_\_\_\_\_  
 \_\_\_\_\_ Health care professionals  
 \_\_\_\_\_ African-Americans  
 \_\_\_\_\_ Other \_\_\_\_\_

5. Is this material appropriate for the intended audience?

\_\_\_\_\_yes \_\_\_\_\_no

If no, please explain: \_\_\_\_\_

6. Do you approve this material for production or purchase?

\_\_\_\_\_yes \_\_\_\_\_no

Signature \_\_\_\_\_

Date \_\_\_\_\_

\* Messages provided to young people in schools and in other settings should be guided by the principles contained in "Guidelines for Effective School Health Education to Prevent the Spread of AIDS" (MMWR 1988;37 [suppl. no. S-2]).

# Request For Materials Review

OPHN Nutrition Materials Review Committee

**Please Type or Print**

Date: \_\_\_\_\_ Phone: \_\_\_\_\_ District: \_\_\_\_\_

Submitted by: \_\_\_\_\_ Title of material \_\_\_\_\_

Permission was obtained to print, adapt or revise non-DHEC material? N\_\_ Y\_\_ N/A\_\_

**Type of Material Submitted**

Flyer \_\_\_\_\_ Brochure \_\_\_\_\_ Teaching packet \_\_\_\_\_ Video \_\_\_\_\_ Audio tape \_\_\_\_\_

Slides \_\_\_\_\_ Other (specify) \_\_\_\_\_

**Intended target audience:**

Infants \_\_\_\_\_ Children \_\_\_\_\_ Prenatals \_\_\_\_\_ Lactating women \_\_\_\_\_

Family planning \_\_\_\_\_ General public \_\_\_\_\_ Work site health promotion \_\_\_\_\_

Special needs \_\_\_\_\_ Other (specify) \_\_\_\_\_

**Intended Reading Level**

= or < 5th grade \_\_\_\_\_ 5th-7th grade \_\_\_\_\_ High school \_\_\_\_\_ Above high school \_\_\_\_\_

**Major points:** \_\_\_\_\_

**Field Tested:** Yes \_\_\_\_\_ No \_\_\_\_\_

**Return to:** Chair, OPHN Nutrition Materials Review Committee, SC DHEC, Office of Public Health Nutrition, Robert Mills Complex, 1751 Calhoun St., Columbia 29201.

## Response Of OPHN Nutrition Materials Review Committee

Approved \_\_\_\_\_ Not approved \_\_\_\_\_ Comments: \_\_\_\_\_

Chair signature: \_\_\_\_\_ Date \_\_\_\_\_

INFORMATION AND EDUCATION COMMITTEE  
S.C. STATEWIDE FAMILY PLANNING PROGRAM

Title of Material Reviewed \_\_\_\_\_

Easy to Understand                       Hard to Understand

Suitable for target population       Unsuitable for target population   
If unsuitable, why? \_\_\_\_\_

Long enough                       Too long   
If too long, what length would you suggest? \_\_\_\_\_

Content appears accurate               Does not appear accurate   
If content does not appear accurate, what corrections would you make? \_\_\_\_\_  
\_\_\_\_\_

Art work good                       Art work not good   
If not good, what changes would you make? \_\_\_\_\_

Materials Reviewed

Pamphlet/ Handout                       16mm film

Poster                       Slide Tape

Recommended for use                       Not recommended for use

Comments \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date: \_\_\_\_\_ Reviewed by: \_\_\_\_\_

## BIBLIOGRAPHY

Kirsch I., Jungeblut A., Jenkins L., Kolstad A., Adult Literacy in America: A First look at the results of the National Adult Literacy Survey, national Center for Education Statistics, Department of Education, 1993.