

# Strategies for Recruiting Children for Usability Tests

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## Abstract

This paper summarizes strategies for recruiting children for usability tests. We discuss the development and distribution of informational flyers, screening potential participants, logistical issues, ethical concerns, and the importance of rapport. Recruiting children requires creativity and sensitivity, but is well worth the effort when evaluating children's products or educational tools.

## Introduction

Incorporating children into usability testing is a challenging task. Not only are there ethical concerns, but there are numerous challenges involved with recruiting, screening and testing children. American Institutes for Research (AIR) has evaluated products and educational tools with over 1,200 children in the past five years. In this paper, we outline the techniques that we have used to recruit and schedule children aged 9-15 for usability tests.

## Can Children Provide Meaningful Data?

Some usability specialists may wonder whether young children are capable of participating in usability test sessions, and whether these sessions can yield informative data. AIR has tested children as young as age nine with much success. In fact, we have confirmed through empirical studies that children as young as nine can engage in real-time think aloud tasks as they interact with a product (e.g., an educational tool). Moreover, we found that young children are capable of providing just as much information on potential problems as adult expert reviewers and, in some cases, that they contribute unique information not obtained from expert review (Paulsen, 1999). It is likely that children as young as five can provide meaningful think aloud data since the technique is commonly used by teachers in classroom settings as an instructional and remedial tool with reported success (Pressley & Afflerbach, 1995). We have not confirmed this empirically in our usability tests, but we believe it is possible to conduct usability test sessions with children as young as age five. It is our experience that children are often more willing to think aloud than adults because they are used to doing so in school.

## Finding Participants

The first step in recruiting young participants is sending information about the study to the right sources. Unlike adults, recruiting children for a research study is complicated because we cannot seek permission directly from the children. Parents first need to trust our organization and the legitimacy of our research before they allow their child to participate in a study.

Public schools are one of the most common places to find children, but there are often multiple levels of approval that need be obtained first, including permission from superintendents, principals, and teachers, then parents and guardians. Recruiting students that attend private schools or are home-schooled can be very productive because they do not have as many constraints.

Posting or distributing flyers in schools may seem like the most fruitful route, but as described earlier, there are often a number of hurdles involved in recruiting students for research activities directly through the schools. We have found that obtaining permission from superintendents, principals, and teachers can easily take several weeks. Beyond that, it can often take up to two or three weeks for parents to respond to the study.

Tutors, babysitters or PTA parent leaders are other effective options. PTA parent leaders can also post an advertisement in the school newspaper. If the budget allows for a "finder's fee" for recommending us to parents of participants, we offer \$10-\$50 (per participant scheduled) to anyone who refers individuals to us. A potential drawback to using a referral program is that the participants may know each other. However, depending on the type of study (one-on-one interviews versus a focus group) and the size of the sample, this may not be critical. In fact, it can be a benefit since some children may be able to "carpool" with other children for sessions that are going to be conducted simultaneously. Additionally, many times we ask a participant

if another friend is interested. This makes the experience less intimidating and more fun for the child, and saves the moderator time for recruiting other children.

Some usability specialists recruit participants that are children of employees in their own company. While we have found this effective on occasion, our typical approach is to recruit children who have no ties to our organization to avoid potential partiality or bias.

## **Creating and Distributing Flyers**

Flyers are very effective when recruiting for usability studies. We create informational flyers that describe the purpose and length of the study and reimbursement (both the amount and the form of payment). For children, cash is more convenient because they often do not have checking accounts. Also, we typically print the flyer on colored paper or use colored ink to draw people's attention. We include the name of the person in charge of screening participants and, if different, the name of the person that can answer general questions about the study (i.e., what type of data will be collected, how the data will be used, and what happens to the videotapes.) We also write a letter to each parent to introduce our company and our research. We send a packet to each parent, including the letter and a flyer, and call them a few days later to find out if they are interested in participating in the research.

If time is important, alternatives include posting flyers at supermarkets, libraries, fast-food restaurants, Boys' and Girls' Clubs, and local "hangouts" such as bowling alleys, putt-putt golf courses and arcades. In our experience, most of these places will allow flyers to be posted on bulletin boards or mini-flyers (about the size of an index card) left at a front desk. Flyers usually disappear within the week, so we replenish flyer stacks at each facility every week or two. In addition, we have found that flyers are most effective two to three weeks before testing begins.

## **Screening Participants**

The first step in screening potential participants is to develop a script that asks the parents relevant questions about their children based on the study's goals. Asking about a child's school performance (like grades in math or science) can be a delicate subject, especially on the telephone. So, when possible, we limit the questions to only those that are necessary for the study. For example, when recruiting for a study evaluating a video game product, we focus only on the aspects that define that target user, such as gender, age, and video game usage and interest. If we have additional questions that we would like answered but are not critical to recruiting the participant (e.g., the family's income status or the child's ethnic background), we ask them during a pre-test interview or in a questionnaire.

We also pay special attention to the order of the questions in a recruiting screener. Typically, we ask questions that are most important at the beginning so that we avoid wasting the parent's time if the child does not qualify for the study. Also, we may ask less personal questions at the beginning to help the parent feel more comfortable. Notably, if we have to screen a child directly, we do not ask any personal questions.

When we place a screening call, we ask to speak with a child's parent or guardian. We feel it is more appropriate to ask parents the screening questions, rather than the children themselves. We do so primarily to assure that the parents feel comfortable, but also because there are questions that a child may not be able to answer, such as their household income.

Consider having a written document to send to the parents of the children that did not qualify for the study or those who called after the study was full. In this letter (or script, if delivering message on the telephone), one should reassure parents that their child cannot participate because of logistical reasons rather than a particular problem with their child. Parents can be offended and upset if their child cannot participate, so one needs to be prepared to handle a deferral with extreme sensitivity.

## **Confirming Participants**

After scheduling a time with the parents, we send a letter via e-mail, fax or regular mail to confirm their child's appointment, (similar to any participant in a usability study.) Typically, we will address the letter to the person we spoke to on the phone or to both the parent and child (e.g., "Dear Ms. Hanson and Charlie:") The letter includes the day, date and time of the interview, any information or materials the child needs to bring, directions to the facility, contact information in case they

need to cancel or reschedule the appointment, and the reimbursement amount. If appropriate, we remind them that we will be videotaping the session and that they may be in a room with observers watching behind a one-way mirror.

In addition to sending a confirmation letter, we also place a call to the household one or two days before the test session. The purpose of the call is to remind the parent of the interview, and in rare cases, reschedule if there is a last-minute conflict. We also remind the parent to bring any required materials or information to the interview (e.g., signed consent forms). If necessary, we also clarify to whom we will make the check payable. Parents are sensitive to this issue, so often we will simply ask them to spell the name for the check to avoid making them state that the check will be issued to them.

Parents are understandably protective of their children, so speaking to them on the telephone for extended periods can produce unnecessary anxiety. In most cases, we will ask to speak to the same parent we spoke to when screening the child. In cases where they are not available, we ask to speak to another parent or guardian and if different, the person who will be bringing the child to our facility. This way we can also confirm that the directions are clear. We rarely speak to the child unless they pick up the phone first. If this happens, we generally limit our conversation to explaining who we are (name and company) and telling the child we are pleased that he or she is participating in the study.

## **Ethical Issues**

AIR has a strict policy that states that we must receive signed consent from a parent or guardian before any child under the age of 18 may participate in a usability test. This is commonly accepted practice within the field, and required by law in many cases. Additionally, AIR's Internal Review Board (IRB) reviews all study designs and materials, including Informed Consent forms, before we conduct any tests. This ensures that the study meets ethical guidelines and standards and that participants are never placed in harm's way. It is especially important that we carefully explain the purposes of the research study to younger participants to assure that they are not confused and they do not feel manipulated in any way.

In addition, it is important to ensure that child participants are protected at all times during the usability test. For both the protection of the participants, and legal protection of our own staff, we always show parents the testing room. Parents are allowed to wait for their child outside the testing room if they so choose. We also schedule a break halfway through the test session and remind participants that they can stop at anytime. Having videotape constantly recording during the session offers protection for everyone involved.

## **Importance of Rapport**

The most successful test sessions with children (or adults, for that matter) are usually ones in which we have been able to establish a good rapport. Having a good rapport with test participants puts them at ease, and helps them to feel more comfortable sharing their thoughts and insights than if they do not trust the test administrator. Children are no exception. It is essential that the rapport continue throughout the recruitment and screening stages to the test session itself. Exhibiting friendly, professional behavior not only puts the children at ease, but also helps parents feel more comfortable about leaving their children in our care for a two-hour session.

## **Conclusion**

Conducting usability tests with children presents several challenges. However, there is no better way to evaluate products designed for use by children. Our experience and research has shown that even young children can be usability test participants. Their data are rich and useful to developers of children's products and educational tools—data that can be gleaned from no other source. Recruiting children for usability testing requires careful planning, creative thinking, and sensitivity to the needs of children and the parent. This paper has summarized some strategies that may help usability professionals anticipate and deal with any challenges they face in using young participants.

## **References**

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