

How to Conduct a Cognitive Interview

A Nutrition Education Example

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Introduction and Need for Manual Development

Cognitive interviewing is a technique used to provide insight into learners' perceptions in which individuals are invited to verbalize thoughts and feelings as they examine information. Use of cognitive interview techniques may improve the development of materials. The example presented in this manual is based on nutrition materials and processes using the Transtheoretical Model of Behavior Change to increase fruit and vegetable intakes of young adults aged 18 to 24 years. Lack of published cognitive interview guidelines for nutrition education projects prompted development of this manual.

About the manual. . .

“How to Conduct a Cognitive Interview: A Nutrition Education Example,” demonstrates application of cognitive interviewing to nutrition education. Researchers and educators interested in using cognitive interview techniques will find this manual to be a valuable resource for designing and implementing cognitive interviews. This manual is organized into four sections: 1) Scheduling the Pre-Interview and Cognitive Interview, 2) Conducting the Pre-Interview and Cognitive Interview, 3) References, and 4) Appendices. A detailed description of each section is provided in the table of contents on the following page.

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Scheduling the Pre-Interview and Cognitive Interview: Instructions

1. Schedule an interviewee's pre-interview and cognitive interview back-to-back on the same day, if possible. Conducting the pre-interview and cognitive interview back-to-back helps ensure that the interviewee is familiar and comfortable with the cognitive interview process. Scheduling the pre-interview and cognitive interview on the same day also eliminates the need for two separate meetings, which is less burdensome for the interviewee.
 - Schedule the pre-interview and cognitive interview within 1-2 days of each other if it is not possible to conduct them on the same day.
2. Use the script and guidelines provided in Appendix A to help you schedule the pre-interview and cognitive interview.

Conducting the Pre-Interview and Cognitive Interview: Instructions

I-2 Days Prior to Conducting the Pre-Interview and Cognitive Interview

I. Assemble the following materials:

- _____ Pre-interview materials (we used physical activity/exercise pamphlets)

- _____ Pens

- _____ Consent forms (See samples in Appendix B)

- _____ Record forms (See samples in Appendix B)

- _____ Tape recorder

- _____ Cassette tapes (have extra tapes in case you need more or have a problem with them)

- _____ Materials for the interviewee to review: for this study we used a F&V [Fruit & Vegetable] Connection Magazine and F&V Connection Newsletters

- _____ Money (used as an incentive in this project. Bring only enough money for the number of interviews you will be conducting. (See Appendix C for money handling guidelines)

2. Make sure the tape recorder is working properly. Practice recording in advance to verify that the tape recorder can adequately pick up sound.

3. Call the interviewee to remind him/her of the pre-interview and cognitive interview. Tell him/her to allow ____ minutes (our interviews lasted 45 minutes) to complete the pre-interview and cognitive interview.

Day of the Pre-Interview and Cognitive Interview

1. Arrive at least 30 minutes early to set up materials and familiarize yourself with the interview location.
2. Test the functioning of the recorder to make sure it is working properly. If there is a problem, be very attentive to note-taking.
3. Set up the table and chairs so the two chairs are perpendicular to one another. This perpendicular arrangement facilitates conversation.
4. Verify that you have the materials to be reviewed during the pre-interview and cognitive interview (e.g., pamphlets, newsletters).
5. Set up equipment and materials so they are easily accessible to you.
6. Keep the money in a secure location.
7. Complete the appropriate information on the pre-interview and cognitive interview recording forms.
8. Review the interview tips on page 4.

Interview tips

- Allow enough time so that the pre-interview and cognitive interview are not rushed. More complete and in depth responses to fewer questions will be more useful than minimal or less in depth responses to more questions.
- Provide non-verbal reinforcement to let the interviewee know that you are listening, such as nodding your head, saying ‘hmm mmm,’ and saying ‘okay,’ or ‘I see.’
- Encourage the interviewee to provide specifics about what s/he is thinking.
- Use the following prompts if the interviewee appears to be having difficulty thinking aloud:
 - “Tell me what you’re thinking.”
 - “What are you thinking about right now?”
- Listen to what the interviewee ‘thinks’ about or mentions so you can probe further on these items later on, if needed. For example, if an interviewee says s/he ‘liked’ a graphic or thought a section s/he read was ‘interesting,’ but does not explain why, probe with additional questions. Use the probes in Table I (page 10) as a guide.
- If you have a trained note-taker available, have him/her record items the interviewee talks about during the pre-interview and cognitive interview, such as graphics, sections read, activities or questions s/he completed, overall design or appearance (e.g., length, color, layout), etc., and put quotes around words/phrases used by the interviewee.
- Instruct the note-taker, if applicable, to record non-verbal actions the interviewee displays while looking over the materials, such as fidgeting, picking at fingernails, twirling hair, appearing distracted, etc.
- Debrief with the note-taker, if applicable, to verify that all information is complete.

Interviewee Arrival

Guidelines if the interviewee arrives on time

Follow the steps below if the interviewee arrives on time for the pre-interview and cognitive interview. If the interviewee arrives late or does not show up for the pre-interview and cognitive interview, proceed to the guidelines on page 6.

1. Introduce yourself, thank the interviewee for coming, and show him/her where to sit.
2. Establish rapport with the interviewee to ease anxiety that s/he may have about participating in the pre-interview and cognitive interview.
3. Remind the interviewee about the purpose of the project and tell him/her you are interested in hearing what s/he has to say about the materials.
4. Record the start time on the pre-interview recording form.
5. Hand the interviewee a pre-interview consent form (Appendix B) and read the form aloud to the interviewee.
6. Answer any questions.
7. Begin the pre-interview warm-up on page 7.

Guidelines if the interviewee arrives late or does not show up

If the interviewee arrives late and you have enough time to do the pre-interview and cognitive interview. . .

Conduct the pre-interview and cognitive interview.

If the interviewee arrives late and you do not have enough time to do the pre-interview and cognitive interview. . .

Explain that the time left will not allow you to hear his/her comments about the materials. Reschedule the pre-interview and cognitive interview as soon as possible. Tell the interviewee to allow ___ minutes (our interviews lasted 45 minutes) to complete both components of the project.

If the interviewee does not want to reschedule, explain to him/her that the pre-interview and cognitive interview are requirements of the project and by choosing not to complete them, s/he will no longer be allowed to participate in the project.

If the interviewee does not show up for the pre-interview and cognitive interview. . .

Call the interviewee, confirm the date and time of your session, express your interest in talking with him/her, and reschedule the pre-interview and cognitive interview as soon as possible. Tell the interviewee to allow ___ minutes (our interviews lasted 45 minutes) to complete both components of the project. If the interviewee does not want to reschedule, explain to him/her that the pre-interview and cognitive interview are requirements of the project and by choosing not to complete them, s/he will no longer be allowed to participate in the project.

Conducting the Pre-Interview: Introduction and Warm-Up

Introduction

“Thinking aloud may be new and unfamiliar to you, but please know there are no wrong answers. I am only interested in knowing what is going through your mind. Any information you provide during this pre-interview will not be used in the project; this session is merely to help you become familiar and comfortable with the ‘think aloud’ process.”

Warm-up

“Before we begin the actual pre-interview, I’d like to ask you a ‘warm-up’ question to introduce you to the think aloud process.”

“Try to visualize the place where you live, and think about how many windows there are in that place. As you count the windows, tell me what you are seeing and thinking about.” (Willis, 1994)

- Proceed to the pre-interview introduction (page 8) after the interviewee has completed the warm-up question.

Conducting the Pre-Interview: Introduction and Questions

Introduction

“For the pre-interview, I’m going to show you a pamphlet on physical activity. Take as much time as you need to look over the pamphlet. As you look over the pamphlet, I will ask you some questions about what you are thinking. I will be taking a few notes during the session. This will help me remember what you said.”

“Feel free to comment or ask questions as you look over the pamphlet. I did not design the pamphlet and you will not hurt my feelings, no matter what you say. There are no wrong answers. What questions do you have before we get started?”

- Hand the physical activity pamphlet to the interviewee and proceed with question 1 (page 9).

Pre-Interview Questions

Question 1

“Please look over the pamphlet. Take as much time as you would like to look over the pamphlet. As you are doing this, tell me out loud any thoughts that go through your mind.”

If the interviewee:

You may respond:

Asks what s/he is supposed to do. . .

“I am interested in what you are thinking as you look over the pamphlet. Do whatever you need to help you think aloud about the pamphlet.”

Appears to be having difficulty thinking aloud. . .

“Tell me what you are thinking.”
“What thoughts are going through your mind right now?”

Is thinking aloud with no difficulty. . .

“That’s great. Thinking out loud like this is just what I need.”
“Good. Your comments help me understand what you’re thinking about.”

Asks you questions about the pamphlet. . .

“I’m very interested in knowing what questions you have; however, due to the nature of the project, I cannot answer your questions at this time. I will write down your questions and take them back to the researcher and she will follow-up with you on your questions. Please continue to express any questions you have while you are looking over the pamphlet. It will be helpful to know what questions you have about the pamphlet.”

Table 1. Sample probes to use during the pre-interview and cognitive interview.

Items mentioned while reviewing project materials.	Probe(s)
Graphics	You mentioned (insert graphic name). What thoughts came to mind while looking at (insert graphic name)?
Sections/phrases read	You mentioned reading (section/phrase): 1. What thoughts came to mind while reading (section/phrase)? 2. Why did you decide to read (section/phrase)?
Activities	You commented on or indicated completing (insert activity name): 1. What thoughts came to mind while looking over or completing (insert activity name).? 2. What made you decide to look at or complete (insert activity name)?
Design/color/length	You commented on (design/color/length). What thoughts did you have about (the design/color/length)?

Question 2

“What other thoughts came to mind while you were looking over the pamphlet that you haven’t shared?”

- If the interviewee appears comfortable thinking aloud, proceed to the Closing section on page 11 after the interviewee has completed question 2.
- If the interviewee is having difficulty thinking aloud or did not share many thoughts, continue with:

“Now, I’d like to show you one more pamphlet on exercise.”

- Hand the exercise pamphlet to the interviewee and continue with question 3.

Question 3

“Please tell me out loud any thoughts you have while looking at the exercise pamphlet.”

- Use probes from Table I on page 10 as a guide if applicable.
- Wait until the interviewee has completed looking over and sharing any thoughts about the pamphlet, then proceed to the Closing section.

Closing

“Thank you for taking time to talk with me about these materials. What questions do you have?”

- Answer any questions, record the stop time on the pre-interview recording form, and proceed to the cognitive interview introduction on page 12.
- If you are not conducting the cognitive interview immediately following the pre-interview and the cognitive interview has already been scheduled, confirm the date, time, and tell the interviewee you look forward to talking with him/her about the interview materials.
- If you are not conducting the cognitive interview immediately following the pre-interview and the cognitive interview has not been scheduled, schedule the cognitive interview as soon as possible. If the interviewee cannot schedule the interview now, remind him/her that you will be calling shortly to schedule the interview. Use the script and guidelines provided in Appendix A to schedule the cognitive interview.

Conducting the Cognitive Interview: Cognitive Interview Introduction and Questions

Introduction

“Thank you for participating in this cognitive interview. Your feedback will help us learn how to develop better nutrition education materials on fruits and vegetables for young adults. The purpose of this interview is to find out what you think about the recruitment process, materials, and phone calls related to this project.

“I will be tape recording the interview. Do I have your permission to record the interview?”

- If yes, start the tape recorder and read the consent form (Appendix B) to the interviewee.
- If no, read the consent form (Appendix B) to the interviewee.

“The interview format will be the same ‘think aloud’ process that we used in the pre-interview you participated in earlier. What questions do you have before we begin?”

- Answer any questions.

“Please remember that there are no wrong answers. I did not design any of the materials and you will not hurt my feelings. Feel free to say anything you’re thinking.”

- Proceed to the newsletter questions on page 13.

F & V Connection Newsletter Questions

“First, I am going to ask you some questions about a newsletter on _____.” (insert fruit or vegetable depending on which one you are administering first).

- Hand the fruit or vegetable newsletter to the interviewee.

Question 1

“Please look over the newsletter. Take as much time as you would like to look over the newsletter. As you’re doing this, tell me out loud any thoughts that come to mind.”

- Use the probes in Table 1 on page 10 as a guide if applicable.
- Proceed to question 2 after the interviewee has provided his/her thoughts about the newsletter.

Question 2

“What other thoughts did you have about the newsletter that you haven’t shared?”

- Use the probes in Table 1 on page 10 as a guide if applicable.
- After the interviewee has provided additional thoughts about the newsletter, hand him/her the other newsletter and repeat questions 1 and 2.
- Proceed to the Assessment Call questions on page 14.

F & V Assessment Call Questions

“Now I am going to ask you some questions about the telephone call you received from the research assistant at (insert institution name). During this telephone call, you were asked some questions about fruits and vegetables. Do you recall answering these questions?”

If no, respond: “Here are some examples of the questions asked that may help you remember the phone call:”

“In the past month, how often did you drink 100% orange juice or grapefruit juice?”

“How confident do you feel that you can shop for a variety of vegetables? Responses were: not, somewhat, quite, very, or extremely confident.”

“Do you recall answering these types of questions?”

If yes
↓

If no, proceed to magazine question 1 on page 16.

If yes: → Proceed to question 1.

Question 1

“What thoughts came to mind as you were answering questions about your fruit intake over the telephone?”

If the interviewee has difficulty recalling thoughts, probe:

“Some of these questions asked about the number of fruits you eat, how often you eat fruit instead of junk food, or how confident you were that you can keep fruit available.”

If the interviewee still does not recall his/her thoughts:

Continue with question 2.

Question 2

“What thoughts came to mind as you were answering questions about your vegetable intake over the telephone?”

If the interviewee has difficulty recalling thoughts, probe:

“Some of these questions asked about the number of vegetables you eat, how often you eat vegetables instead of junk food, how confident you are you can keep vegetables available.”

If the interviewee still does not recall his/her thoughts:

Continue with question 3.

Question 3

“What thoughts do you have about using the telephone as a way to provide information about your fruit and vegetable intake?”

Probe: “What did you like or not like about giving information over the phone about your fruit and vegetable intake?”

Probe: “If someone was interested in knowing about your fruit and vegetable intake, how would you prefer to let him/her know this information?”



If the interviewee has difficulty answering this question, ask the following:

“For example, did you like telling someone about your fruit and vegetable intake over the telephone? Why?”

F & V Connection Magazine Questions

“The next set of questions is about the F & V Connection magazine you received. Do you recall receiving this magazine?”

- Hand a copy of the magazine to the interviewee.

If no, proceed to the Recruitment questions on page 19.

If yes, proceed to question 1.

Question 1

“What did you do with the magazine after you received it?”

If the interviewee didn't read it/threw it away, probe:

“What were you thinking when you (threw it away, tossed it aside, etc.) (Fill in the question based on what the interviewee said s/he did with the magazine).”



Proceed to question 10 on page 18.

If the interviewee looked over or read parts of the magazine, proceed to question 2.

Question 2

“How long ago did you look over or read the magazine?”

Question 3

“What do you think about sharing this information with others?”

Probe: “Have you discussed this information with anyone you know who is participating in the project?”

Question 4

“As you looked over or read the magazine, did it hold your attention?”

If no, probe: “Why do you think it didn’t hold your attention?”

“What else were you thinking about?”

If yes, probe: “Why do you think it held your attention?”

Question 5

“How much time did you spend looking over or reading the magazine?”

Question 6

“What parts of the magazine did you look over or read?”

- Tell the interviewee that s/he can page through the magazine to show you.
- Write down or verbalize the sections the interviewee highlights on the interview recording form so this information is recorded.

Question 7

“What thoughts came to mind while you looked over or read that section?”

- Repeat this question for each section the interviewee looked over or read.

Question 8

“Why did you decide to look over or read that section?”

- Repeat this question for each section the interviewee looked over or read.

Question 9

“What other thoughts came to mind when you looked over or read the magazine that you haven’t shared?”

- If the interviewee states that s/he is not interested in learning more about fruits and vegetables, skip question 10 and go to the Recruitment questions on page 19.

Question 10

“The magazine and newsletter are two ways to learn about fruits and vegetables. If you are interested in learning about fruits and vegetables, how would you prefer to learn about them?”

Question 11

“When you signed up to participate in this project, an F & V Connection magazine was handed to you. Handing out fruit and vegetable materials is one way of providing that information to individuals. If you wanted to get information about fruits and vegetables, how would you prefer to receive that information?”

- Proceed to the Recruitment questions on page 19 after the interviewee has responded to question 11.

Recruitment Questions

“The last set of questions is about how you were asked to participate in this project.”

Question 1

“Future projects might want to focus on young adults. What suggestions do you have to get young adults to participate?”

Question 2

“What did you think about the way you were recruited?”

- Proceed to the Closing section after the interviewee has responded to question 2.

Closing

“Thank you for taking time to answer these questions and for your participation in this project. Please feel free to share any other comments that you haven’t shared to this point.”

- Pause to allow the interviewee time to share additional comments.

“Your input will be very helpful in developing nutrition education materials on fruits and vegetables for your age group. What questions do you have?”

- Answer any questions and thank the interviewee for his/her participation.
- Hand the payment information sheet to the interviewee. Make sure all of the information is completed on the payment sheet. Explain to the interviewee that his/her social security number is required to process the payment. If the interviewee is not willing to provide his/her social security number, s/he cannot be paid.
- Pay the interviewee \$20.
- If there are questions or concerns, have the interviewee contact (researcher name) at (researcher telephone number).

After completing the pre-interview and cognitive interview

- Record the stop time of the interview on the interview recording form.
- Record in the 'notes' section of the recording forms any notes, comments, or reactions you had about the pre-interview and cognitive interview, such as what went well, what didn't go well, distractions, etc.
- Complete all information on the pre-interview and cognitive interview recording forms.
- Review all notes and fill in any gaps in the interviewee's responses.
- Debrief with the note-taker to make sure no information was missed, to discuss what went well, what could be improved, etc.
- Rewind the tape and write the interviewee ID#, the date of the interview, and your initials on the tape label.
- Keep information for each interviewee in a separate and secure file. This information includes:
 - Pre-interview and cognitive interview recording forms, including notes, comments, etc.
 - Cognitive interview tape
 - Completed payment information sheet

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**Appendix A:
Script and Guidelines for Scheduling the
Pre-Interview and Cognitive Interview**

Scheduling the Pre-Interview and Cognitive Interview

Scheduling guidelines

- Do not schedule sessions with interviewees back-to-back. Allow 30 minutes between sessions to debrief with the note-taker, finish completing the record forms, and prepare for the next session.

- Schedule the pre-interview and cognitive interview at a location that has a room with a door, a table, and chairs, and few distractions.

- Tell the interviewee to allow ___ minutes (our interviews lasted 45 minutes) to complete the pre-interview and cognitive interview.

- If the interviewee says s/he does not want to complete the pre-interview and cognitive interview, tell him/her that because the pre-interview and cognitive interview are both required for the project, s/he will not be able to participate. Thank the interviewee for his/her interest.

- Use the script on page 24 to schedule the pre-interview and cognitive interview.

Script for scheduling the pre-interview and cognitive interview

Hi (interviewee name):

I am calling about the fruit and vegetable nutrition education project you are participating in through (insert institution name). During recruitment for this project, you were informed about a pre-interview and cognitive interview that are components of the project. My name is (insert name), and I am (insert title) working on the project. I am calling to schedule a convenient time for you to complete the pre-interview and cognitive interview. The pre-interview and cognitive interview will take about ____ minutes (our interviews lasted 45 minutes). Please allow enough time in your schedule to complete this. Completion of the pre-interview and cognitive interview is required for participation in the project. What day and time would be convenient for you to participate in the pre-interview and cognitive interview? I look forward to talking with you. If you need to change the day or time of the interview, please contact (researcher name) at (researcher phone number). Thank you for your interest in participating in this project.

If the interviewee asks:

You may respond:

What the pre-interview is for. . .

“The pre-interview will help you become familiar with the interview process used in the project.”

What the interview is for. . .

“I’d like to talk with you about the materials and phone calls you’ve received during this project.”

If you can talk on the phone. . .

“I have some materials I need to show you during the interview.”

**Appendix B:
Sample Consent and Recording Forms**

Introduction

When conducting cognitive interviews, inform the interviewees about the purpose of the interview and their rights as an interviewee. Consent forms are typically used to communicate this information to interviewees. A sample pre-interview consent form and cognitive interview consent form are provided on pages 27 and 28, respectively. These forms are only a guide. Please consult the human subject review committee at your institution for additional information and procedures on the protection of human subjects.

Sample Pre-Interview Consent Form

Thank you for participating in this pre-interview. The purpose of the pre-interview is to help you become comfortable with a process called ‘thinking aloud.’ Thinking aloud involves saying aloud anything that comes in your mind while reading, hearing, or seeing something. The key to the ‘think aloud’ process is to be aware that you have a thought, feeling, or reaction about something, and say it aloud instead of keeping it to yourself.

The reason you were asked to participate in this pre-interview is (insert reason for interviewee participation in the pre-interview). The pre-interview will last about (insert amount of time required to complete the pre-interview).

Your participation in this pre-interview is voluntary and you may discontinue your participation at anytime. The pre-interview is a requirement for participation in the project. If you choose not to complete the pre-interview or voluntarily choose to discontinue the pre-interview, you will no longer be allowed to participate in the project. No known risks are associated with this pre-interview. Any information you provide will be confidential and will not be used in the project; the session is merely to make you familiar and comfortable with the ‘think aloud’ process.

If you have any questions about your rights as a research participant that have not been answered by the researcher, you may contact (insert name and contact information for the Chair of the Committee on Research Involving Human Interviewees) or (insert name and contact information of researcher).

Sample Cognitive Interview Consent Form

Thank you for participating in this cognitive interview. Your feedback will help us (insert benefits gained by interviewee participation). The purpose of this interview is to (insert purpose of the cognitive interview).

Your participation in this interview is voluntary and you may discontinue your participation at anytime without any penalty. The interview is a requirement of the project. If you choose not to complete the interview or voluntarily choose to discontinue the interview, you will no longer be allowed to participate in the project. There are no known risks associated with this interview. The interview will take about (insert length of time required to complete the interview). Following the completed interview, you will be paid (insert incentive amount).

The interview will be tape recorded only with your permission. If permission to record the interview is granted audiotapes and other information from the interview will be kept in a locked filing cabinet until the project is over and destroyed upon completion of the project. Your name will not be associated with any information you provide and will only be known to the individuals working on the project. The information obtained in this study may be published in scientific journals or presented at scientific meetings, but your identity will be kept strictly confidential.

Please know that because this is a federally funded project, we are bound by federal and university law to abide by the statements in this consent form. In addition, we feel it is a matter of moral principle to maintain confidentiality of your responses.

If you have any questions about your rights as a research participant that have not been answered by the researcher, you may contact (insert name and contact information for the Chair of the Committee on Research Involving Human Interviewees) or (insert name and contact information of researcher).

Sample Pre-Interview Recording Form

Interviewer: _____	Date: _____
Interviewee ID: _____	Start Time: _____ AM PM
Gender: M F	Stop Time: _____
	Location: _____
Notes: <ul style="list-style-type: none">▪ Record any factors that influenced the pre-interview, such as interruptions, background noise, recorder problems, etc.)▪ Note any non-verbal communication about the interviewee (such as: appears distracted, fidgets, doesn't pay attention)	

Sample Cognitive Interview Recording Form

Interviewer: _____	Date: _____
Interviewee ID# _____	Start Time: _____ AM PM
Gender: M F	Stop Time: _____
Interview recorded: Yes No	Location: _____
	Fruit Newsletter Reviewed: _____ (ex: PCI Fruit)
	Veg Newsletter Reviewed: _____ (ex: A2 Veg)
Notes: <ul style="list-style-type: none">▪ Record any factors that influenced the interview, such as interruptions, background noise, recorder problems, etc.)▪ Note any non-verbal communication about the interviewee (such as: appears distracted, fidgets)	

**Appendix C:
Instructions for Managing Interview
Materials and Incentives**

As an interviewer, you may be responsible for managing interview results and handling interviewee incentives, such as money. Some instructions for managing these components are provided below:

- Keep interview notes, money, and the tape recorder in a locked and secure location until they are returned to the researcher. You will be responsible for replacing any money or the tape recorder if they are lost or stolen while in your possession.
- Return tapes, notes, any leftover money, and tape recorder to the researcher or a researcher contact immediately following the interview or the next day if no interviews are scheduled.

My signature below indicates that I have read and understood the above information.

Signature

Date