

# **Informational and Educational (I&E) Materials Review: Answers to your frequently asked questions**

February 15, 2023



New York State  
Family Planning  
Training Center  
[nysfptraining.org](https://nysfptraining.org)

# Your Facilitators



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Reproductive Health  
National Training Center



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Deputy Director, RHNTC  
Director, New York State  
Family Planning Training  
Center

# Objectives

By the end of the session, participants should be able to:

- Describe I&E materials review requirements, including updated requirements per the 2021 Title X regulations
- Explain the difference between community participation, education, and project promotion (CPEP) and I&E
- Identify strategies for recruiting and retaining I&E materials reviewers
- Identify in-person and virtual strategies for meaningfully gathering material review input
- Use available resources to support the materials review process

# What is I&E?

# What is I&E Materials Review?

- Specifies that materials must be reviewed by an Advisory Committee of at least 5 individuals to ensure the materials reflect the educational, cultural, and diverse backgrounds of the intended population or community.
- Exists to ensure that informational and educational (I&E) materials developed or made available under the project are suitable for the intended population or community.
- Applies to all I&E materials that Title X agencies disseminate.
- Mandated by the Code of Federal Regulations (CFR

59.6)

# I&E Policy

Each FPP agency should develop its own I&E materials review process policy that is consistent with New York State Program Policy & Procedure Guidance.

Template: <https://rhntc.org/resources/ie-materials-review-policy-template>

[INSERT AGENCY NAME AND LOGO]

## FAMILY PLANNING PROGRAM POLICY AND PROCEDURES

### 5.1 I&E Materials Review and Approval Process

Title X grantees and subrecipient agencies are required to have a review and approval process, by an Advisory Committee, of all informational and educational (I&E) materials developed or made available under the project prior to their distribution (Section 1006(d)(2), PHS Act; 42 CFR 59.6(a)).

Policy Information:	Description:
Policy Title	I&E Materials Review and Approval Process
Effective Date	
Revision Dates	
Review Due Date	
References	Code of Federal Regulations 42 CFR 59.6(a) <a href="https://www.ecfr.gov/current/title-42/chapter-I/subchapter-D/part-59/subpart-A/section-59.6#p-59.6(a)">https://www.ecfr.gov/current/title-42/chapter-I/subchapter-D/part-59/subpart-A/section-59.6#p-59.6(a)</a>
Approved by Signature	
Approved Date	

**Purpose:** The purpose of this policy is to describe (*insert Agency Name*) process for ensuring grantee and subrecipient compliance with the requirement to establish a review and approval process, by an I&E Advisory Committee, of I&E materials (print or electronic) developed or made available under the Title X project, prior to their distribution.

**Policy:** *[Agency may want to include the following]*

- All I&E materials developed or made available under the Title X project will be reviewed and approved by an I&E Advisory Committee prior to their distribution.
- While I&E materials shared on social media must undergo an I&E Advisory Committee review and approval process, social media posts themselves do not require I&E Advisory Committee approval and are instead subject to (*reference Agency social media policy*).

**Procedure:** *[Agency may want to include the following]*

- Whether the grantee will implement the materials review and approval process for all subrecipients and/or service sites at the grantee level, or require that each subrecipient develop its own process for meeting this requirement.
- The process for reviewing materials (e.g., in person, virtually, electronically).
- Criteria (and any relevant review tools) any I&E Advisory Committee members will use for reviewing and approving materials to ensure that they are suitable for the population and community for which they are intended and to ensure their consistency with Title X Program Requirements.
- Frequency of materials review and approval process.
- Documentation (e.g., roster of committee members, list of materials reviewed including dates reviewed and approved, meeting minutes) to demonstrate compliance with this requirement.

# CPEP vs. I&E

	CPEP	I&E
<b>Purpose</b>	Achieve <b>community understanding</b> of the objectives of the program, <b>inform the community</b> of the availability of services; and <b>promote continued participation</b> in the project.	Review and approval of informational and educational materials developed or made available under the project to <b>assure that the materials are suitable</b> for the population or community to which they are to be made available.
<b>Who to engage?</b>	Persons broadly representative of all significant elements of <b>the population to be served</b> , and by others in the community <b>knowledgeable about the community's needs</b> for family planning services such as...youth and client advisory committees, social service agencies, primary care agencies, faith-based community organizations, school personnel, etc.	Include individuals broadly representative (in terms of demographic factors such as race, color, national origin, handicapped condition, sex, and age) <b>of the population or community for which the materials are intended i.e. clients and potential clients.</b>

For more info, see: <https://rhntc.org/resources/comparing-cpep-and-ie-materials-review-job-aid>

**Q. Are Title X agencies required to have two separate committees, one for CPEP and a different one for the I&E materials review?**

**A.** No. Title X agencies are only required to have an I&E materials review committee. The CFR pertaining to I&E (59.6) explicitly requires an Advisory Committee whereas the CFR pertaining to CPEP (59.5) makes no mention of a committee.

<https://rhntc.org/resources/ie-materials-review-frequently-asked-questions-faq>

# Agenda

Next we'll cover guidance, FAQs, and tips for:

- Materials
- Reviewers
- Procedures

## I&E Materials Review Toolkit

<https://rhntc.org/resources/ie-materials-review-toolkit>

The screenshot shows the RHNTC (Reproductive Health National Training Center) website. The header includes the RHNTC logo, navigation links (About, Resources, Grantee Spotlights, Events, Connect with RHNTC), a search bar, and a login/registration link. The main content area is titled 'I&E Materials Review Toolkit' and features a 'Welcome to the Toolkit' section. This section explains that Title X grantees and subrecipient agencies are required to have a review and approval process for I&E materials. Below this, there are two main sections: 'How to Use the Toolkit' and 'Understand I&E Requirements'. The 'How to Use the Toolkit' section includes a list of steps: understand I&E requirements, create I&E policies and a materials inventory log, review I&E materials, and demonstrate compliance with I&E requirements. The 'Understand I&E Requirements' section explains the purpose of the review process. At the bottom, there are two tabs: 'ACTION STEPS' and 'SUPPORTIVE RESOURCES'. The 'ACTION STEPS' tab is active, showing a link to become familiar with I&E materials review requirements by reading Code of Federal Regulations 59.6. The 'SUPPORTIVE RESOURCES' tab shows a link to a 'Comparing CPEP and I&E Materials Review Job Aid'.

**RHNTC**  
REPRODUCTIVE HEALTH  
NATIONAL TRAINING CENTER

About Resources Grantee Spotlights Events Connect with RHNTC

Search Log in or Create Profile

### I&E Materials Review Toolkit

Toolkit/Guide Title X Program Management Title X Family Planning Program

Last Reviewed: 2022-01  
Source: RHNTC

Save

Share

#### Welcome to the Toolkit

Title X grantees and subrecipient agencies are required to have a review and approval process, as required by an Advisory Committee, for all informational and educational (I&E) materials developed or made available under the project, prior to their distribution.

##### How to Use the Toolkit

This toolkit walks agencies through the I&E materials review process and outlines steps to:

- Understand I&E requirements
- Create I&E policies and a materials inventory log
- Review I&E materials
- Demonstrate compliance with I&E requirements

##### Understand I&E Requirements

The purpose of I&E materials review is to ensure that I&E materials developed or made available under a Title X project are suitable for the intended population or community, including clients and potential clients. Before launching an I&E materials review process, agencies should take steps to understand the requirements and components of this process.

#### ACTION STEPS

Become familiar with I&E materials review requirements by reading [Code of Federal Regulations 59.6](#).

#### SUPPORTIVE RESOURCES

Understand the difference between community participation, education, and project promotion (CPEP) and I&E materials

#### Comparing CPEP and I&E Materials Review Job Aid

#### In This Resource:

- Welcome
- How to Use this Toolkit
- Understand I&E Requirements
- Create I&E Policies and a Materials Inventory Log
- Review I&E Materials
- Demonstrate Compliance with I&E Requirements
- Notes, References, and Acknowledgements

# Materials

## **Q. What materials need to go through the I&E materials review process?**

**A. All family planning and reproductive health materials, print and electronic, made available to clients and potential clients, regardless of whether they were created in-house, by a company that creates health education materials, or by the Centers for Disease Control and Prevention (CDC) or another government agency.**

## **Q. Does that include materials intended for clinicians?**

A. **No**, only client-facing materials must go through the I&E materials review process.

## **Q. Does that include materials developed by referral partners?**

A. **Yes**, if a referral partner developed a material intended for family planning clients that the Title X agency then distributes, that material would need to be reviewed.

# Tell us in the chat...

Where do you go for client education materials?

1. Bedsider <https://beyondthepill.ucsf.edu/educational-materials>
2. Office on Women's Health  
<https://www.womenshealth.gov/patient-materials/health-topic>
3. ACOG <https://www.acog.org/store/products/patient-education>
4. Other?

# **Q. Does information provided electronically need to go through the I&E materials review process?**

**A. Yes.** All I&E materials that a Title X agency makes available to clients need to be reviewed. This includes all client-facing I&E content and materials posted on the agency's website, shared through an online portal, and made available to clients through other electronic and non-electronic means.

“Based on [I&E materials review] meetings, we are moving forward in having more digital material rather than print. Young people stated that they did not want to bring home material that they might be judged on some level by.”

**-Children’s Aid Society**

**Q. Do social media posts on platforms such as Facebook, Twitter, and Instagram need to go through the I&E materials review process?**

A. While I&E materials shared on social media must undergo an I&E Advisory Committee approval process, **social media posts themselves do not require I&E Advisory Committee approval** and are instead subject to the Title X agency's social media policy.

# Is this informational and educational?

Family Planning of South Central New York

**Intro**

Affordable, compassionate reproductive medical care and comprehensive sexual health education

Page · Medical Center

FAMILY PLANNING SOUTH CENTRAL NY INC is responsible for this Page

117 Hawley St, Binghamton, NY, United States, New York

(607) 723-8306

fpscny@fpscny.org

linktr.ee/fpscny

fpscny.org

Open now

Rating · 5.0 (10 Reviews)

Suggest Edits

**Photos** See all photos

HERE COMES CORTLAND!

National Black HIV/AIDS Awareness Day

OUR PATIENTS SAY

The devastating consequences of domestic violence can cross generations and last a lifetime.

BLACK HISTORY MONTH

What are the signs & symptoms of cervical cancer?

\$15 EMERGENCY CONTRACEPTION

Are you protected against HPV related cancers?

FREE CONDOMS

Family Planning of South Central New York

January 16 at 1:04 PM

Happy MLK Day! Together, we can build a more united America by doing good and honoring Dr. King's legacy

**"Darkness cannot drive out darkness, only light can do that. Hate cannot drive out hate, only love can do that."**

- Martin Luther King Jr

3 Likes · 1 share

Like · Comment · Share

Family Planning of South Central New York

January 13

Friendly reminder that we welcome walk-ins at ALL of our locations 🌟 check out our operating hours on our website for more info. We'll see you soon!

**Walk-ins**

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BLACK HISTORY MONTH

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\$15 EMERGENCY CONTRACEPTION

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FREE CONDOMS

Family Planning of South Central New York

February 7 at 10:00 AM

Today is National Black HIV/AIDS Awareness Day, a day to acknowledge progress in HIV prevention and care among Black/African American people, while recognizing the work still needed. To #StopHIVTogether, we must address HIV stigma and barriers. <http://bit.ly/3HHmwOY> #NBHAAD


Family Planning of South Central New York

February 6 at 10:00 AM

We ❤️ serving our incredible community! Come walk on in or make an appointment at any of our local medical centers. You're always in safe hands with FamPlan!

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# Is this informational and educational?

 Affirm Sexual and Reproductive Health For All

### Intro

A non-profit dedicated to making sexual & reproductive health available to all in Arizona.

1 Page · Reproductive Service

2 Safford, AZ · Sierra Vista, AZ · Douglas, AZ · Phoenix, AZ · Tucson, AZ · Page, AZ · Casa Grande, AZ

3 (602) 258-5777

4 info@affirmaz.org

5 affirmaz.org

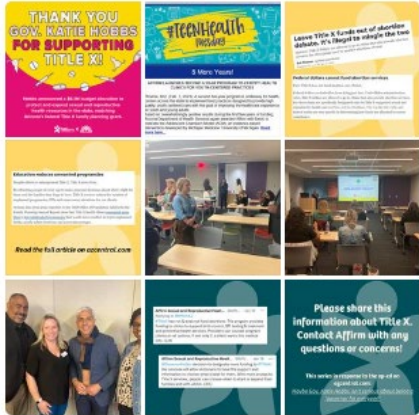
6 Send message  
Typically replies in days

7 Price Range · \$


Suggest Edits

### Photos

See all photos



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 Affirm Sexual and Reproductive Health For All  
November 16, 2022 ·

Birth control is not controversial. The vast majority of folks believe that everyone deserves access to the full range of methods!

BC can help:

- ✦ ease periods
- ✦ prevent pregnancy
- ✦ prevent STIs
- ✦ reduce gender dysphoria

What does BC help YOU with? Comment below. #ThxBirthControl



1 Like · 3 shares

Write a comment...

**Do you have a social media policy you'd be willing to share?**  
Email it to us at [nysfptraining@jsi.com](mailto:nysfptraining@jsi.com)

## Q. How frequently do I&E materials need to be reviewed?

A. While Title X regulations do not say how frequently approved materials must be reevaluated to ensure they are still appropriate, it is **recommended to reevaluate materials every two to three years**. Each Title X agency should address the frequency of reevaluating materials in its I&E materials review policy.

# I&E Materials Inventory Log



## I&E Materials Inventory Log

**Purpose:** This log is designed to help Title X agencies maintain a record of all informational and educational (I&E) materials and their reviews, in compliance with Title X Program Requirements. Subrecipients should be prepared to share an up-to-date materials log during Office of Population Affairs (OPA) program reviews and grantee site visits.

**How to use:** Review all I&E materials before putting them into circulation and then on a regular basis (once every one to two years) depending on your agency's policy. After each review, update the details of the review.

Material title	Topic	Format (print or electronic)	Type (e.g., palm card, pamphlet)	Language (e.g., English, Spanish)	Publication date	General review date	Medical review date	I&E Advisory Committee review date	Was the material reviewed to assure it is culturally and linguistically appropriate, inclusive, and trauma-informed?	Recommended for use? (Yes/No)	Comments	Date discontinued, if applicable

*This publication was supported by the Office of Population Affairs (Grant FPTPA006030).  
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<https://rhntc.org/resources/ie-materials-inventory-log>

# Tell us in the chat...

Do you maintain a materials inventory log like the one shown on the prior slide?

1. Yes
2. No
3. Not sure

# **Q. What should we do if the I&E Advisory Committee requests changes to a material developed by CDC or another materials distributor?**

A. You can:

- use a different material
- work with the materials distributor to see if they would consider updating the material
- create your own version of the material, as long as the original source is cited

# Reviewers

# Q. Who can be an Advisory Committee reviewer?


A. Agencies need at least 5 reviewers (clients, individuals who reflect the demographics of clients, and/or potential clients) for each material, but they don't need to have the same set of reviewers for each material.

For example, a Title X agency can recruit clients to conduct material reviews while they are at the health center for an appointment.

# Q. How should reviews be documented?

A. Ask each reviewer to fill out the *I&E Advisory Committee Review Form* (or similar form that collects both reviewer demographics and material feedback) for each material.

<https://rhntc.org/resources/ie-advisory-committee-review-form>  
<https://rhntc.org/resources/formulario-de-revision-del-comite-asesor-de-materiales-de-informacion-y-educacion-ie>



The image shows a form titled "I&E Advisory Committee Review Form" with the RHNTC logo. It includes fields for Agency name, Review date, Material title, and Language. Below these is a section "Your Thoughts about This Material" with a question about the main message and a table for content feedback. The table has columns for "Yes" and "No" and rows for questions about understanding, tone, and trust. A comments section and a footer with a disclaimer are also present.

**I&E Advisory Committee Review Form**

**RHNTC**  
REPRODUCTIVE HEALTH  
NATIONAL TRAINING CENTER

Thank you for being part of the Advisory Committee to review an informational and educational (I&E) material that our agency is considering distributing. We are asking you to review this material because we want to know whether you think it is a good one to share with our clients, and what you think would make it better. There are no right or wrong answers. At the end of the form you will see a set of questions about you. We ask these questions because we want to make sure that we get opinions from a group of people who represent the community we serve.

Agency name: \_\_\_\_\_

Review date: \_\_\_\_\_

Material title (if there is no title, describe the material): \_\_\_\_\_

Language of the material under review: \_\_\_\_\_

**Your Thoughts about This Material**

Please review the material and then answer the following questions.

1. What is the main message of this material?

\_\_\_\_\_

2. Please answer the questions below about this material's written content.

	Yes	No
Is the material easy to understand?	<input type="checkbox"/>	<input type="checkbox"/>
Are there any specific words or medical terms that might be hard for some people to understand?	<input type="checkbox"/>	<input type="checkbox"/>
Is the material written in a friendly and respectful tone?	<input type="checkbox"/>	<input type="checkbox"/>
Are there any words or language in this material that seem disrespectful, hurtful, or wrong in some way?	<input type="checkbox"/>	<input type="checkbox"/>
Do you trust the information in this material?	<input type="checkbox"/>	<input type="checkbox"/>

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

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# Tips for Reviewer Recruitment & Engagement

- Provide appropriate compensation such as gift cards, a stipend, or hourly compensation
- Cover travel costs and provide childcare
- Ask clients to review materials while they are waiting for their appointment
- Engage youth advisory groups
- Ask for assistance with recruitment from partners, such as social service and primary care provider agencies
- Ask existing reviewers for recommendations
- Recruit through social media, tabling or other community engagement (CPEP) activities
- Committee appreciation day with clinic walk-through

# Tell us in the chat...

How are you currently recruiting Advisory Committee members?

Do you retain members or engage members on a rotating basis?

If you retain members, how do you keep them engaged?

# Review Procedures

# Advisory Committee Review Requirements

In reviewing materials, the Advisory Committee shall:

- Consider the educational, cultural, and diverse backgrounds of individuals to whom the materials are addressed;
- Consider the standards of the population or community to be served with respect to such materials;
- Review the content of the material to assure that the information is factually correct, medically accurate, culturally and linguistically appropriate, inclusive, and trauma informed;
- Determine whether the material is suitable for the population or community to which is to be made available; and
- Establish a written record of its determinations.

# NYSDOH Guidance

To ensure that all materials are relevant to the needs and experiences of the population, materials must meet health literacy guidelines.

Considerations include:

- Reading level of fourth-grade level or less
- Arrangement of text on the page to highlight key messages
- Less text often is better
- Culturally relevant images
- Presentation of information in a format appropriate to the priority populations

<https://nysfptraining.org/wp-content/uploads/2023/01/2023-NYSFPP-Policy-and-Procedure-Guidance.pdf>

# Suggested Process

## General Staff Review

To assess:

- Material audience
- Reading grade-level
- Whether or not the message is clear, accurate, uses common words
- Visual appeal and appropriateness
- If the material is respectful of the clients' cultures and values

## Medical Staff Review

To assess:

- Factuality
- Technical and clinical accuracy

## I&E Advisory Committee Committee Review

To assess:


- Clarity of main message
- Visual appeal and appropriateness
- Whether committee members think the material provided useful information

# General Staff Review Form

Review each material to ensure that it aligns with the backgrounds and needs of the client population. Consider whether the material is culturally and linguistically appropriate, inclusive, and trauma-informed.

<https://rhntc.org/resources/ie-general-staff-review-form>

## I&E General Staff Review Form



**Purpose:** Title X agencies are responsible for evaluating the appropriateness of informational and educational (I&E) materials for their client population. Use this form to evaluate a material's cultural and linguistic appropriateness, readability, and whether it meets your agency's basic standards for sharing.

**How to use:** Identify a staff member to assess whether the I&E material under review is suitable for the intended audience and to complete this form. Refer to online, free readability assessments to determine a material's reading grade level, as needed. Once the review is complete, follow the next steps outlined at the end of this form.

Agency name: \_\_\_\_\_ Review date: \_\_\_\_\_

Material title (if there is no title, describe the material): \_\_\_\_\_

Material type: \_\_\_\_\_ Publication date: \_\_\_\_\_

Material source/publisher: \_\_\_\_\_

Language(s) the material is available in: \_\_\_\_\_

Language of the material under review: \_\_\_\_\_

### Material Evaluation

Review the material and use your judgment to answer the questions below. If you think the material is not culturally sensitive or appropriate for the client population, skip questions 1–14 and go directly to question 15. Once you have completed this form, follow the next steps outlined at the bottom of the page.

- Who is the intended audience for this material? (Check all that apply)
  - ☐ Females
  - ☐ Males
  - ☐ LGBTQ+
  - ☐ Adolescents (13–18)
  - ☐ Young adults (18–25)
  - ☐ Adults (26 and older)
  - ☐ Other: \_\_\_\_\_
- What is the reading grade level of this material? \_\_\_\_\_  
Describe how you arrived at the reading level (Fry Graph, SMOG, Flesch Reading Ease, etc.): \_\_\_\_\_
- Is the main message of the material clear? Yes ☐ No ☐ N/A
- Is the material's content accurate? Yes ☐ No ☐ N/A
- Does the material use common, everyday words? Yes ☐ No ☐ N/A
- Does the material use the active voice? (For example, does it say, "We will ask..." rather than "You will be asked...") Yes ☐ No ☐ N/A
- Does the material use font types and sizes that are easy to read? Yes ☐ No ☐ N/A
- Does the material incorporate white space and headers to break up the text? Yes ☐ No ☐ N/A
- If there are illustrations or pictures, are they appropriate? Yes ☐ No ☐ N/A
- If there are illustrations or pictures, are they visually appealing? Yes ☐ No ☐ N/A

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# Ensuring Materials are Trauma-Informed

- New requirement in the 2021 regulations
- Overall, to be considered trauma-informed, I&E materials should:
  - Be clear and easy to understand
  - Use a friendly, respectful tone
  - Avoid judgmental or stigmatizing language
  - Incorporate inclusive language and images
  - Approach the client as a partner in decision making and care
  - Reflect input from the intended audience

For more info, see: <https://rhntc.org/resources/tips-using-trauma-informed-lens-develop-or-select-ie-materials-job-aid>

## **Q. How should we assess for an appropriate reading level?**


A. There are many free and low-cost tools available online that Title X agencies can use to determine the reading level of materials; search for “FRY graph,” “SMOG,” “Flesch,” and/or “Kincaid,” which are all established readability assessments. Also, ask Advisory Committee members to note any words that are unclear or confusing during their review.

# Medical Review Form

Review each material to ensure that it is medically and technically accurate.

<https://rhntc.org/resources/ie-medical-review-form>

## I&E Medical Review Form



**Purpose:** Title X agencies are responsible for ensuring the factual, technical, and clinical accuracy of all informational and educational (I&E) materials developed or made available under the project prior to distribution.

**How to use:** Identify a medical reviewer within your agency to review the I&E material and complete this form. Once the review is complete, follow the next steps outlined at the bottom of the page.

Agency name: \_\_\_\_\_ Review date: \_\_\_\_\_

Material title (if there is no title, describe the material): \_\_\_\_\_

Material type: \_\_\_\_\_

Material source/publisher: \_\_\_\_\_

Publication date: \_\_\_\_\_

Language(s) the material is available in: \_\_\_\_\_

Language of the material under review: \_\_\_\_\_

### Material Evaluation

1. Who is the intended audience for this material? (Check all that apply)

<input type="checkbox"/> Females	<input type="checkbox"/> Young adults (18–25)
<input type="checkbox"/> Males	<input type="checkbox"/> Adults (26 and older)
<input type="checkbox"/> LGBTQ+	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Adolescents (13–18)	

2. In your estimation, how medically accurate is this material (in other words, to what extent does it reflect current medical practices)?

☒ Highly accurate

☐ Somewhat accurate

☐ Not accurate

List any inaccuracies:

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# I&E Advisory Committee Review Form

*I&E Advisory Committee Review Form* collects both reviewer demographics and material feedback for each material.

<https://rhntc.org/resources/ie-advisory-committee-review-form>  
<https://rhntc.org/resources/formulario-de-revision-del-comite-asesor-de-materiales-de-informacion-y-educacion-ie>

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Review date: \_\_\_\_\_

Material title (if there is no title, describe the material): \_\_\_\_\_

Language of the material under review: \_\_\_\_\_

**Your Thoughts about This Material**

Please review the material and then answer the following questions.

1. What is the main message of this material?

\_\_\_\_\_

2. Please answer the questions below about this material's written content.

	Yes	No
Is the material easy to understand?	<input type="checkbox"/>	<input type="checkbox"/>
Are there any specific words or medical terms that might be hard for some people to understand?	<input type="checkbox"/>	<input type="checkbox"/>
Is the material written in a friendly and respectful tone?	<input type="checkbox"/>	<input type="checkbox"/>
Are there any words or language in this material that seem disrespectful, hurtful, or wrong in some way?	<input type="checkbox"/>	<input type="checkbox"/>
Do you trust the information in this material?	<input type="checkbox"/>	<input type="checkbox"/>

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


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# Materials Review Summary Form

Complete a summary of the reviewers' findings and recommendations, as well as the final recommendation whether or not to distribute the material to clients. This summary can also serve as meeting minutes.

<https://rhntc.org/resources/ie-materials-review-summary-form>

## I&E Materials Review Summary Form



**Purpose:** Title X agencies can use this form to summarize all findings and recommendations for one informational and educational (I&E) material, including those from the general staff reviewer, medical reviewer, and I&E Advisory Committee reviewers. This summary should document how the review process led to the decision of whether or not to share the material with clients and can serve as I&E Advisory Committee meeting minutes.

**How to use:** Fill out the form below and indicate whether the material is recommended for sharing.

Agency name: \_\_\_\_\_ Date: \_\_\_\_\_

Form completed by: \_\_\_\_\_ Job title: \_\_\_\_\_

Material title (if there is no title, describe the material): \_\_\_\_\_

Material source/publisher: \_\_\_\_\_

Publication date: \_\_\_\_\_

This material is intended for (check all that apply):

- ☐ Females
- ☐ Males
- ☐ LGBTQ+
- ☐ Adolescents (13–18)
- ☐ Young adults (18–25)
- ☐ Adults (26 and older)
- ☐ Other: \_\_\_\_\_

Language(s) the material is available in: \_\_\_\_\_

Language of the material under review: \_\_\_\_\_

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# Tips for Conducting Reviews

Structure for reviews can take many forms

How:	
In-person <ul style="list-style-type: none"><li>• In the waiting room</li><li>• At reviewer pizza parties</li><li>• At client appreciation parties</li><li>• At tabling events</li></ul>	Virtual <ul style="list-style-type: none"><li>• Through email</li><li>• Through Zoom or phone conferences</li><li>• Structured survey and/or open-ended responses</li></ul>

Tell us in the chat...how do you structure reviews?

# Tell us in the chat...

Are you meeting....

1. Virtually
2. In-person
3. Hybrid/mix

**Q. What if Advisory Committee members prefer to document their review online rather than via a paper survey?**

A. Title X agencies can ask I&E Advisory Committee members to document their review online (for example, via an online survey or email) or a paper survey. The review process and Advisory Committee feedback

must be documented, but it doesn't matter if this documentation is electronic or on paper.

# **Q. How can Title X agencies ensure they get clear and helpful feedback from reviewers?**

A. Instead of using a likert scale, consider asking Committee members to answer specific questions, such as:

- “Is the material easy to understand?”
- “Do you like the way the material looks?”
- “Is there anything you don’t like about the material?”
- “Do you recommend that we share this material with our clients?”

Additionally, consider including open-ended questions such as, “What would need to change on the material in order for you to strongly recommend its use?”

# Site Visit Preparation Checklist

Have the following documents available:

- ❑ Written policies that describe your I&E materials review and approval process
- ❑ Up-to-date *I&E Materials Inventory Log*
- ❑ Documentation demonstrating that I&E Advisory Committee members are broadly representative of the population or community for which the materials are intended (e.g., demographic information collected on the review forms)

<https://rhntc.org/resources/ie-program-review-preparation-checklist>

# Site Visit Preparation Checklist

For each I&E material reviewed, have a file that includes:

- ❑ A copy of the material
- ❑ Documentation, such as the completed *I&E General Staff Review Form*, that demonstrates the material was reviewed to assure the information is culturally and linguistically appropriate, inclusive, and trauma-informed
- ❑ Documentation, such as the completed *I&E Medical Review Form*, that demonstrates the material was reviewed to assure that information is factually correct and medically accurate
- ❑ Documentation, such as the completed *I&E Advisory Committee Review Forms*, that demonstrates that the material was reviewed by at least five members
- ❑ The completed *I&E Materials Review Summary Form*, meeting minutes, or other documentation of the Committee's findings

<https://rnhnc.org/resources/ie-program-review-preparation-checklist>

“The I & E committee continues to monitor the demographic trends in Nassau County as a way to determine whether or not to modify our approach in providing tailor made SRH materials and services for marginalized groups. Nassau County’s population is becoming increasingly diversified with an influx of various ethnic groups from South East Asia, South and Central America and the Caribbean Diaspora. And, as they diversify, the I & E Committee is charged with making sure that these new ethnicities, with their new cultures, languages and religions, are reflected in our materials used in outreach and education efforts.

**-NuHealth**

# Thank you!

Contact | [nysfptraining.org/](https://nysfptraining.org/)

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