

Suitability Assessment of Materials (SAM)

Title of teaching material:

Date:

Your name:

FACTOR TO BE RATED

SCORE

COMMENTS

2 points for superior rating
 1 point for adequate rating
 0 points for not suitable rating
 N/A if the factor does not apply to this material

I. CONTENT

(a) Purpose is evident

- 2 Purpose is explicitly stated in title, or cover illustration, or introduction.
- 1 Purpose is not explicit. It is implied, or multiple purposes are stated.
- 0 No purpose is stated in the title, cover illustration, or introduction.

(b) Content about behaviors

- 2 Thrust of the material is application of knowledge/skills aimed at desirable reader behavior rather than nonbehavior facts.
- 1 At least 40 percent of content topics focus on desirable behaviors or actions.
- 0 Nearly all topics are focused on nonbehavior facts.

(c) Scope is limited

- 2 Scope is limited to essential information directly related to the purpose. Experience shows it can be learned in time allowed.
- 1 Scope is expanded beyond the purpose; no more than 40 percent is nonessential information. Key points can be learned in time allowed.
- 0 Scope is far out of proportion to the purpose and time allowed.

(d) Summary or review included

- 2 A summary is included and retells the key messages in different words and examples.
- 1 Some key ideas are reviewed.
- 0 No summary or review is included.

2. LITERACY DEMAND

(a) Reading grade level

- 2 5th-grade level or lower (5 years of schooling level).
- 1 6th-, 7th-, or 8th-grade level (6-8 years of schooling level).
- 0 9th-grade level and above (9 years or more of schooling level).

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(b) Writing style, active voice

- 2 Both factors:
 - (1) Mostly conversational style and active voice.
 - (2) Simple sentences are used extensively; few sentences contain embedded information.
- 1 (1) About 50 percent of the text uses conversational style and active voice.
 - (2) Less than half the sentences have embedded information.
- 0 (1) Passive voice throughout.
 - (2) Over half the sentences have extensive embedded information.

(c) Vocabulary uses common words

- 2 All three factors:
 - (1) Common words are used nearly all of the time.
 - (2) Technical, concept, category, value judgment (CCVJ) words are explained by examples.
 - (3) Imagery words are used as appropriate for content.
- 1 (1) Common words are frequently used.
 - (2) Technical and CCVJ words are sometimes explained by examples.
 - (3) Some jargon or math symbols are included.
- 0 Two or more factors:
 - (1) Uncommon words are frequently used in lieu of common words.
 - (2) No examples are given for technical and CCVJ words.
 - (3) Extensive jargon.

(d) Context is given first

- 2 Consistently provides context before presenting new information.
- 1 Provides context before new information about 50 percent of the time.
- 0 Context is provided last or no context is provided.

(e) Learning aids via "road signs," subtitles and captions

- 2 Nearly all topics are preceded by an advance organizer (a statement that tells what is coming next).
- 1 About 50 percent of the topics are preceded by advance organizers.
- 0 Few or no advance organizers are used.

3. GRAPHICS

(a) Cover graphic shows purpose

- 2 The cover graphic is
 - (1) friendly,
 - (2) attracts attention,
 - (3) clearly portrays the purpose of the material to the intended audience.
- 1 The cover graphic has one or two of the superior criteria.
- 0 The cover graphic has none of the superior criteria.

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(b) Type of graphics

- 2 Both factors: (1) Simple, adult-appropriate, line drawings/sketches are used.
(2) Illustrations are likely to be familiar to the viewers.
- 1 One of the superior factors is missing.
- 0 None of the superior factors are present.

(c) Relevance of illustrations

- 2 Illustrations present key messages visually so the reader/viewer can grasp the key ideas from the illustrations alone. No distractions.
- 1 (1) Illustrations include some distractions.
(2) Insufficient use of illustrations.
- 0 One factor: (1) Confusing or technical illustrations (nonbehavior related).
(2) No illustrations, or an overload of illustrations.

(d) Lists and tables explained

- 2 Step-by-step directions, with an example, are provided that will build comprehension and self-efficacy.
- 1 "How-to" directions are too brief for reader to understand and use the graphic without additional counseling.
- 0 Graphics are presented without explanation.

(e) Captions used for graphics

- 2 Explanatory captions with all or nearly all illustrations and graphics.
- 1 Brief captions used for some illustrations and graphics.
- 0 Captions are not used.

4. LAYOUT AND TYPOGRAPHY

(a) Layout factors

- 2 At least five of the following eight factors are present:
 - 1. Illustrations are on the same page adjacent to the related text.
 - 2. Layout and sequence of information are consistent, making it easy for the patient to predict the flow of information.
 - 3. Visual cuing devices (shading, boxes, arrows) are used to direct attention to specific points or key content.
 - 4. Adequate white space is used to reduce appearance of clutter.
 - 5. Use of color supports and is not distracting to the message. Viewers need not learn color codes to understand and use the message.
 - 6. Line length is 30-50 characters and spaces.
 - 7. There is high contrast between type and paper.
 - 8. Paper has nongloss or low-gloss surface.
- 1 At least three of the superior factors are present.
- 0 (1) Two (or less) of the superior factors are present.
(2) Looks uninviting or discouragingly hard to read.

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(b) Typography

- 2 The following four factors are present:
 - 1. Text type is in uppercase and lowercase serif (best) or sans-serif.
 - 2. Type size is at least 12 point.
 - 3. Typographic cues (bold, size, color) emphasize key points.
 - 4. No ALL CAPS for long headers or running text.
- 1 Two of the superior factors are present.
- 0 One or none of the superior factors are present.
 - Or, six or more type styles and sizes are used on a page.

(c) Subheads ("chunking") used

- 2 (1) Lists are grouped under descriptive subheadings or "chunks."
 - (2) No more than five items are presented without a subheading.
- 1 No more than seven items are presented without a subheading.
- 0 More than seven items are presented without a subheading.

5. LEARNING STIMULATION, MOTIVATION

(a) Interaction used

- 2 Problems or questions presented for reader responses.
- 1 Question-and-answer format used to discuss problems and solutions (passive interaction).
- 0 No interactive learning stimulation provided.

(b) Behaviors are modeled and specific

- 2 Instruction models specific behaviors or skills.
 - (For example, for nutrition instruction, emphasis is given to changes in eating patterns or shopping or food preparation/cooking tips; tips to read labels.)
- 1 Information is a mix of technical and common language that the reader may not easily interpret in terms of daily living (for example: Technical: Starches-80 calories per serving; High Fiber-1-4 grams of fiber in a serving).
- 0 Information is presented in nonspecific or category terms such as the food groups.

(c) Motivation, self-efficacy

- 2 Complex topics are subdivided into small parts so that readers may experience small successes in understanding or problem solving, leading to self-efficacy.
- 1 Some topics are subdivided to improve the readers' self-efficacy.
- 0 No partitioning is provided to create opportunities for small successes.

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6. CULTURAL APPROPRIATENESS

(a) Match in logic, language, experience (LLE)

2 Central concepts/ideas of the material appear to be culturally similar to the LLE of the target culture.

1 Significant match in LLE for 50 percent of the central concepts.

0 Clearly a cultural mismatch in LLE.

(b) Cultural image and examples

2 Images and examples present the culture in positive ways.

1 Neutral presentation of cultural images or foods.

0 Negative image such as exaggerated or caricatured cultural characteristics, actions, or examples.

Total SAM score:

The maximum possible total score is 44 points (100 percent).

44 (maximum possible score)

minus # N/A _____ x 2 = _____ (revised maximum score)

Total SAM score _____ / revised maximum score _____ = Percent score: _____%

Interpretation of SAM percentage ratings:

- 70-100 percent superior material
- 40-69 percent adequate material
- 0-39 percent not suitable material

Suitability Assessment of Materials (SAM)

From: Doak, C. C., Doak, L. G. & Root, J. H. (1996). Teaching Patients with Low Literacy Skills (2nd ed.). Philadelphia: J. B. Lippincott Company, pages 49-59.

The first time you use SAM, follow the six steps below:

1. Read through the SAM factor list and the evaluation criteria.
2. Read the material (or view the video) you wish to evaluate and write brief statements as to its purpose(s) and key points.
3. For short instructions, evaluate the entire piece. For long instructions, select samples to evaluate.
4. Evaluate and score each of the 22 SAM factors. Calculate total suitability score.
6. Decide on the impact of deficiencies and what action to take.

Using SAM to evaluate a health care instruction

1. **Read the SAM instrument and the evaluation criteria.**
2. **Read the material to be assessed.** Read (or view) the material you plan to evaluate. It will help if you write brief statements as to its purpose(s) and its key points. Refer to these as you evaluate each SAM factor. Use a note pad to jot down comments and observations as you read the material, view the video, or listen to the audiotape.
3. **The sampling process for SAM is somewhat similar to that described earlier for selecting samples to apply a readability formula.** If you are applying SAM to a short material such as a single-page instruction or a typical pamphlet (twofold or threefold), assess the entire instruction. Similarly, for audio- and videotaped instructions of less than 10 minutes, evaluate the entire instruction. select three pages that deal with topics central to the purpose of the booklet. For booklets of more than 50 pages, increase the sample size to six pages. For video- or audiotaped instructions exceeding 10 minutes, select topics in 2-minute blocks from the beginning, middle, and end sections of the video or audio presentation.
4. **Evaluate material vs. criteria for each factor, decide on its rating, and record it on the score sheet.** As you seek to evaluate your material against each factor, you are likely to find wide

To apply SAM to a longer text, such as a booklet, variation among different parts of your material. For any one factor, some parts may rate high (superior) while other parts of the same material rate low (unsuitable). For example, some illustrations may include captions while others do not. Resolve this dilemma by giving most weight to the part of your material that includes the key points that you previously identified in step 2 above.

Materials that meet the superior criteria for a factor are scored 2 points for that factor; adequate receives 1 point; not suitable receives a zero. For factors that do not apply, write N/A. Use the SAM scoring sheet to record your score for each of the 22 factors and to guide you in calculating the overall rating in percent.

5. Calculate the total suitability score. When you have evaluated all the factors, and written a score for each one on the score sheet, add up the scores to obtain a total score. Spaces to do this are provided on the score sheet. The maximum possible total score is 44 points (100 percent)—a perfect rating, which almost never happens. A more typical example: if the total score for your material is 34, your percent score is 34/44 or 77 percent.

For some instructional materials, one or more of the 22 SAM factors may not apply. For example, for an audiotape or a videotape, the text readability level (factor 2a) does not apply. To account for SAM factors that occasionally may not apply to a particular material, subtract 2 points for each N/A from the 44 total. Let's do that using the example from the paragraph above. If you arrived at a total score of 34 as noted above, but had one N/A factor, subtract 2 points from 44 to a revised maximum score of 42. Thus, the percent rating would become 34/42, for a rating of 81 percent.

Interpretation of SAM percentage ratings:

70-100 percent	superior material
40-69 percent	adequate material
0-39 percent	not suitable material

6. Evaluate the impact of deficiencies; decide on revisions. A deficiency, especially an "unsuitable" rating, in any of the 22 factors is significant. Many of these can be readily overcome by revising a draft material or by adding a supplemental instruction to a material already published. However, factors in two of the groups, the readability level and cultural appropriateness, must be considered as potential go-no/go signals for suitability regardless of the overall rating.

For example, except in the rare cases where an instruction contains a set of illustrations that replicate the entire message given in the text, a written instruction with a very high readability level will not be understood and is unsuitable. Similarly, a material that portrays an ethnic group in an inappropriate way is almost surely unsuitable because it is likely to be rejected by members of that ethnic group.