

Informational and Educational (I&E) Materials Review



Frequently Asked Questions (FAQ)

Title X grantees, subrecipients, and service sites are required to have an Advisory Committee review and approve all informational and educational (I&E) materials developed or made available under the project before distributing them.

This job aid provides answers to commonly asked questions that Title X agencies have about the I&E materials review process. For a deeper dive into this process, see the [I&E Materials Review Toolkit](#), which provides resources that Title X agencies can use to ensure their materials meet I&E requirements and are appropriate for their client populations.

This job aid is organized into four topics related to the I&E materials review process:

- Requirements
- Materials
- Reviewers
- Procedures

Requirements

What is the I&E materials review?

The I&E materials review process exists to ensure that materials developed or made available under the project are suitable for the intended population or community. All materials that Title X agencies disseminate must go through this process.

The I&E materials review process is mandated through the [Code of Federal Regulations \(CFR 59.6\)](#), which specifies that materials must be reviewed by an Advisory Committee of 5–9 individuals who broadly represent the population or community for whom the materials are intended. These Committee members review the materials to ensure they reflect the educational and cultural backgrounds of the intended population or community.

What is the difference between Community Participation, Education, and Project Promotion (CPEP) and the I&E materials review?

The I&E materials review and CPEP have different purposes. The purpose of CPEP is to achieve community understanding of the objectives of your Title X program, inform the community of the availability of services, and promote continued participation in Title X. CPEP has a very broad purpose. In comparison, the I&E materials review is much more narrowly defined. The purpose of the I&E materials review is to ensure that informational and educational materials developed or made available under the project are suitable for the intended population or community.

For more information about the differences between CPEP and the I&E materials review, see [Comparing CPEP and I&E Materials Review](#).

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

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.

How should a Title X agency determine the details of its I&E materials review process?

Each Title X agency should develop its own I&E materials review process policy. Agencies can adapt the [I&E Materials Review Policy Template](#) and can also reference procedures included in the [CFR 59.6](#).

Materials

What materials need to go through the I&E materials review process?

All family planning and reproductive health materials that Title X grantees, subrecipients, and service sites will make available to clients and potential clients must go through the I&E materials review process. These materials need to be reviewed 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.

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

While Title X legislation does 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. For suggested policy language, refer to the [I&E Materials Review Policy Template](#).

What should a Title X agency do if the I&E Advisory Committee requests changes to a material developed by CDC or another materials distributor?

In this case, the Title X agency can use a different material or work with the materials distributor to see if they would consider updating the material. As long as a Title X agency cites the original source, it can create its own version of the material to use with clients.

What if an I&E Advisory Committee recommends changes to materials developed by the Office of Population Affairs (OPA)?

OPA does not create or distribute client-facing educational materials.

If reviewers determine that a Title X agency should no longer use certain materials, is it acceptable to continue using those materials until the agency identifies new, acceptable materials?

There is no minimum or maximum length of time required between the I&E materials review and when a Title X agency must implement the changes requested by reviewers. When deciding whether to continue using a material, it's important to consider why the material is no longer acceptable. For example, if a material is no longer factually accurate, then it would be important to immediately discontinue using that material or make the material accurate, instead of waiting until a new resource is available.

Do educational materials intended for clinicians and other Title X staff also need to go through the I&E materials review process?

No, only client-facing materials must go through the I&E materials review process. That said, clinicians and staff may at times share clinician- and staff-facing materials with their clients. In light of this, it's important to consider whether clinician- and staff-facing materials are appropriate for clients. It's also important to ensure that clinician- and staff-facing educational materials are factually and medically accurate and include information that aligns with the educational and cultural backgrounds of clients.

Do materials developed by other internal or external entities that a Title X agency refers to—such as dental providers, mental health providers, and primary care providers—need to go through the I&E materials review process?

Any family planning and reproductive health materials that a Title X agency makes available to clients or potential clients through its Title X family planning program need to go through the I&E materials review process before being distributed. Therefore, if a Title X agency's referral partner developed a material intended for family planning clients that the Title X agency then distributes, that material would need to be reviewed. Any client-facing materials that referral partners develop and distribute themselves don't need to be reviewed.

Materials *continued*

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

When the audience of a social media post is the broader community, the post doesn't need to go through the I&E materials review process. However, if the audience is clients or potential clients, those posts do need to be reviewed by an I&E Advisory Committee. Consider planning social media posts in advance and submitting them for I&E Advisory Committee review monthly or quarterly.

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

Yes. All informational and educational 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.

Reviewers

Can a Title X agency's medical director and other staff review materials?

While a Title X agency's medical director and other staff can review materials, these staff reviews do not count toward the requirement to have 5–9 Committee members review I&E materials. A Title X agency's medical director and/or other staff may review materials for factual accuracy, but Committee members are ultimately responsible for approving the materials.

Can I&E Advisory Committee members be compensated?

Yes. I&E Advisory Committee members are providing a valuable service to the Title X Program that requires them to devote time and consideration. To participate, they often need to travel, secure child care, or incur other expenses. Appropriate types of compensation include gift cards, a stipend, or hourly compensation.

To build and maintain trust with Advisory Committee members, be clear about compensation and the anticipated time commitment from the outset. For questions about allowable or appropriate compensation, check with the OPA Title X Project Officer.

Can a Title X agency recruit clients to conduct material reviews while they are at the health center for an appointment? In this scenario, how do clients count toward the requirement to have 5–9 committee members review each material?

Yes, a Title X agency can recruit clients to conduct material reviews while they are at the health center for an appointment. Agencies need 5–9 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 each material that a client reviews, they will count as one committee member for that material. It is important for agencies to document each review. To help ensure proper documentation, ask each reviewer to fill out the I&E Advisory Committee Review Form—or a similar form that collects both reviewer demographic data and material-specific review feedback—for each material they review.

Procedures

What tools are available to determine the appropriate reading level for materials?

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.

Does the review process need to take place in person and include a conversation among reviewers?

No, the review process doesn't need to take place in person nor does it need to include a conversation among reviewers. That said, conversation among reviewers can enhance the quality of the review and lead to more thoughtful determinations about the appropriateness of materials.

How can Title X agencies ensure they get clear and helpful feedback from reviewers?

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?”

Title X agencies can use the I&E Advisory Committee Review Form as is or modify it to meet their needs.

What if I&E Advisory Committee members prefer to document their review online rather than via a paper survey?

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.