2014 RO-ASM Surveyor Respondent Debriefings

Agenda

Introduction – 2-3 minutes
Process for completing the 2012 Economic Census – 5 minutes
Use of workbook view – 5 minutes
Use of form view – 5 minutes
Use of Excel templates – 5 minutes
Coordination of multiple respondents – 5 minutes
Use of paper and/or electronic version of forms – 2-3 minutes
Wrap-up – 1-2 minutes

Research questions

- What are respondents' processes for understanding, gathering, and reporting requested data at smaller multi-unit (MU) companies (i.e., <50 establishments)?
- Do respondents at smaller MUs use Surveyor's workbook view, and if so, how? (E.g., data entry, review, correcting edit failures, etc.)
- Do Rs use Surveyor's form view, and if so, how? (E.g., reading instructions, data entry, review, correcting edit failures, etc.)
- Do Rs use Excel templates? If so, how do they use them? Do they modify them (or would they want to) and if so, how do/would they modify them (e.g., by type of data, location, etc.)? What are reasons for modification (facilitate reporting by other Rs, match their own records, etc.)?
- If Rs use one view/reporting option, do they also use others? If so, how do they use them differently? What do Rs perceive to be the advantages and disadvantages of each? Does one option complement the others, and if so how?
- Do they use the paper and/or electronic (pdf) form, and if so, how?
- In cases where multiple company personnel are involved in completing the RO/ASM, how are they coordinated? I.e., does one respondent solicit data from various people and then enter all the data into the instrument, or do multiple respondents use Surveyor and/or Excel templates independently? What reasons drive the ways that response tasks are distributed? Is there a need for the future system to facilitate multiple users, and if so how would that work?

Before the interview, note:

- Number of estabs
- RO/ASM or RO only
- Whether R received a paper form follow-up

Introduction

- Reasons for visit/call:

- o To get a better understanding of how smaller companies with multiple locations use the Surveyor software to complete the Report of Organization / Annual Survey of Manufactures.
- o To inform the design of our next-generation electronic reporting system, which will be used for the RO/ASM and 2017 Economic Census
- Introduction of Census employees
- Introduction of company employee(s)
- Audio taping
  - o Before we get started: With your permission, I'd like to audio tape this interview, so I don't have to rely solely on taking notes. This session is confidential, and only Census Bureau employees directly involved in this research project would have access to the recording.
  - o Permission to audio-tape discussion? Obtain verbal consent.
- What is your role in the company and major responsibilities?
- How long have you been in your current position?
- Is this your first time completing the RO/ASM?
- Are you responsible for completing any other Census Bureau surveys? Which ones?

Now I would like to ask you some questions about your experiences with completing the RO/ASM and using our reporting application, Surveyor. If possible, please start Surveyor in case you need to refresh your memory of using it.

Process for completing the RO/ASM
- Please briefly describe the steps you took to complete the RO/ASM.
- How did you go about submitting the data?

Workbook view
- Did you use the workbook view in any way? If so, how did you use it?
- Did you use the workbook view to enter data? To review data entered another way?
- Do you have any suggestions for improving the usefulness of the workbook view?
- *(If R did not use workbook view)* Were you aware of the workbook view? If yes, what made you decide not to use it?

Form view
- Did you use the form view in any way? If so, how did you use it?
- Do you have any suggestions for improving the usefulness of the form view?
- *(If R did not use form view)* Were you aware of the form view? If yes, what made you decide not to use it?

Use of Excel templates
- Did you use the downloadable Excel templates for reporting? If so, how did you use them?
    - Do you have any suggestions for improving the usefulness of the spreadsheet templates?
- *(If R did not use Excel)* Were you aware of the spreadsheets? If yes, what made you decide not to use them?

Multiple views/modes
- *(If R used more than one view/reporting mode)* What is different about the ways you used each one?
- What are the advantages and disadvantages of using one view/reporting option over the others for different tasks?

Multiple Rs/data providers
- Did you have access to all the requested information, or did you need to get help from others in your company?
    - If you got help, how many people helped you, and what areas are they in?
    - How did you communicate what you needed from them?
    - Did you send them any additional documents? E.g., the pdf version of the form, your own spreadsheet, the Excel spreadsheet from Surveyor, etc.?
    - Did they return the data to you for you to report, or did they use Surveyor to report the data themselves?
        - If they returned the data to you, how did they send it? I.e., on paper, in an electronic document/file, in the body of an email, etc.?
        - If they used Surveyor themselves, how did you decide that?
        - In the future reporting system, would it be useful to you to have a delegate function so that the system could allow for multiple users in your company? If so, how do you think it would work?

Use of forms (mailed paper or pdf)
- Did you use a paper or electronic copy of the RO/ASM form(s) in any way? If so, how did you use it/them?
- As the Census Bureau moves away from using paper forms to conduct surveys, what would you need in place of a form?

Wrap-up
- Do you have any other comments about your experience with Surveyor?
- Do you have any suggestions for improving our electronic reporting system?

Thank respondent(s) for his/her (their) assistance.