ACES Machine Learning Respondent Debriefing Interviews – Spring/Summer 2019
May 2, 2019

Research Questions:
- How would respondents describe their overall experience with the survey? Item 3A and 3B?
  - Is it clear how reported values for expenditures are associated with the write-in descriptions?
- Do respondents understand what information they are being asked to provide with the survey question?
- Is the *Other*, specify useful?
- What type of responses did they provide in the description field?
- Did respondents report any expenditures that prompted the machine learning component?
  - If so, what were their initial thoughts on the functionality?
- Did respondents encounter any error messages (regarding classification of expenditures)?
- Are respondents able to successfully resolve errors associated with the classification of expenditures?
  - Did respondents remove entries in both the value and description fields when reclassifying?
- Are the instructions helpful to respondents?
  - Do respondents understand the terminology used?
- Did respondents view definitions?
  - Were the definitions helpful?
  - Do respondents understand the terminology used?
  - Did the definitions prompt respondents to reclassify expenditures?
- How are expenditures and associated values maintained in records?
- Did the respondent agree with the reclassification of an expenditure by the machine learning component?
  - If no, how would they resolve this discrepancy?
- Respondent thoughts on the machine learning design/functionality
  - Automatic reclassification version confirmation of reclassification

Expected Length of Debriefing Interview: 30 minutes

Required Materials

- Screenshot of Item 3

Introduction

- Introduce all attendees and include brief overview about the survey
- Tell respondent why we asked to speak with them
    - Understand how they developed their answers
    - Refine the survey instrument and make it easier to report
- Explain purpose of the interview: Assess the functionality of the write-in field for reporting expenditures not listed
- Send visual illustrating the machine learning functionality via email (e.g., images/screenshots, video clip illustrating functionality
- Administer debriefing probes to address research questions

General probes that may be used throughout the interview:
- Reflect back on respondent's answer: "you said…"
- In your own words, what is this question asking?
- How did you arrive at this number/answer this question?
- What records (if any) did you look at? What line or lines were of interest?
- Specifically, what did you include in this number? What did you exclude?
- Did you consult other people to obtain this answer?

General Questions

ABOUT THE RESPONDENT
First, I'd like to learn a bit about you, and your role here at the company.
- What is your job title?
- How much experience do you have completing the Annual Capital Expenditures Survey?
- What has your experience completing the Annual Capital Expenditures Survey been like?
- Do you work with anyone else in your company to get the data for the Annual Capital Expenditures Survey?
    - How are those other people involved?
    - How many people are involved?

Now I'd like to learn a little about your company.
- Can you give us a brief description of what your company does?
    - What kind of products do you sell/manufacture or services do you provide?

Debriefing Probes/ Questions

In order to refresh your memory, I'd like for you to review the screenshots and video clip that I e-mailed to you. *(Note: Test administrator explains machine learning functionality to the respondent.)*

- How would you describe your overall experience with completing the Annual Capital Expenditures Survey?
- Can you tell me about your experience responding to item 3?
  - In your own words, what is being asked in this item?
  - Is it clear how reported values for expenditures are associated with the write-in descriptions above?
    - Can you tell me a little more about that?
- What information do you think that this survey question is asking for you to provide?
- Did you find the *Other*, specify category useful?
  - If no, why wasn't the Other, Specify category useful for you?
- Do you recall what type of responses you provided in the description field?
  - Can you tell me more about that?
- Did you encounter any error messages (regarding classification of expenditures)?
  - If so, what were your initial thoughts on the functionality of this?
  - How did you resolve the errors associated with the classification of expenditures?
    - Did you remove entries in both the value and description fields when reclassifying?
    - Did you contact the Census Bureau for assistance? If no, can you tell me about that?
  - Did you agree with the reclassification of an expenditure by the machine learning component?
    - If yes, can you tell me more about that?
    - If no, how did you resolve this discrepancy?
  - If the survey were to automatically reclassify your entry without the use of the message what are your thoughts on this?
    - Would you prefer this reclassification to be confirmed by you? Why or why not?
- Did you find the instructions to be helpful?
  - Did you understand the terminology used?
    - If no, what terminology did you not understand?
- Did you view definitions for Structures and/or Equipment?
  - If yes, which? Were the definitions helpful?
  - Did you understand the terminology used in the definitions?
  - Did the definitions prompt you to reclassify expenditures?
- How are expenditures and associated values maintained in your company's records?
  - Can you tell me more about that?
  - Are the records easily accessible to you?
  - Did you have to reach out to others to answer the survey questions?

- If yes, about how many other people? What are their role(s) in your company?

<u>Wrap-up</u>

We are almost done, and I just have a few wrap-up questions.

- Do you think this specific question (Item 3) was easy to answer, difficult to answer, or somewhere in between? Why?
- How long did it take to answer items 3A and 3B?
- How much time did it take to complete the entire survey, including gathering and entering the data?
- Is there anything else we haven't touched on today, that you think is relevant?
- Do you have any questions for us?

Thank you very much for your time today!