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# United States Census 2020

**Study Plan for the <<"2018 End to End  
Census Test" or "2020 Census">  
< "Operation Name">> Operational  
Assessment**

**<<Name of the sponsoring Integrated Project  
Team>>**

**<<Project Manager's Name>>**

**<<Author Name(s), Division or Office  
Names(s)>>**

***Template for 2018 End-to-End Census Test or 2020 Census***  
**Operational Assessment Study Plans**  
**May 19, 2017 Version 1.3**

## I. Introduction

<<Describe the 2020 Census Operation including purpose and goals. A summary possibly could be lifted from the Detailed Operational Plan>>

<<Incorporate the text, below, in all 2018 End-to-End Census Test study plan introductions>>

“The 2018 End-to-End Census Test is an important opportunity for the Census Bureau to ensure an accurate count of the nation’s increasingly diverse and rapidly growing population. It is the first opportunity to apply much of what has been learned from census tests conducted throughout the decade in preparation for the nation’s once-a-decade population census. The 2018 End-to-End Census Test will be held in three locations, covering more than 700,000 housing units: Pierce County, Washington; Providence, Rhode Island; and the Bluefield-Beckley-Oak Hill, West Virginia area.”

“The 2018 End-to-End Census Test will be a dress rehearsal for most of the 2020 Census operations, procedures, systems, and field infrastructure to ensure there is proper integration and conformance with functional and non-functional requirements. The test also will produce a prototypes of geographic and data products. Note that the 2018 End-to-End Census Test results are based on three sites that were purposely selected and cannot be generalized to the entire United States.”

This study plan documents how the <<operation name>> will be assessed, as guided by questions to be answered.

## II. Background

State what has happened in past censuses and tests related to this operation. Focus on results from the 2010 Census and the 2012-2017 Research and Testing endeavors. Illustrate the significant results and lessons learned of each and how they were bridged, or accounted for, in the subsequent test or ultimately to the 2020 Census.

In consideration of the four innovation areas for 2020, add background on whether and how this operational assessment it tied to innovations under implementation.

## III. Assumptions

State relevant assumptions, including those specific to data used and cost estimates, when applicable, if decisions have yet to be made about some operational component.

## IV. Scope of Assessment Content and Questions-To-Be-Answered

Summarize the high-level project workflow, by leveraging the operational Business Process Model where applicable.

For 2018 End to End Census Test assessments, summarize how the operation will be assessed for 2020 Census operational readiness by indicating what the key measures are.

Referencing the *Operational Assessment Content Guidelines for the 2018 End-to-End Census Test and the 2020 Census* (go to the [EAE IPT Resource Site](#)), summarize the topics that will be included in the assessment report. Establish a separate section heading for each type of content the assessment will include. Since the nature of operations varies, the content of what's to be reported for each operation will also vary. For example, where the assessment for the Forms Printing and Distribution operation may include lessons learned and planned versus actual variance analyses on budget, workload, and schedule, other operations will have additional content. As an example, the Nonresponse Followup assessment would also include, in the least, staffing ratios, training, enumerator productivity rates, debriefings, etcetera. In the least, all operations should have lessons learned.

IPTs that *own* open Census Knowledge Management recommendations for the given operation (from the 2010 Census and/or 2012-2017 Research & Testing efforts) must document the action plans on how the recommendations will be addressed.

State the questions to be answered that the operational assessment addresses. Include the overall major questions. Break down the overall questions into smaller questions as applicable.

## V. Methodology

Describe the quantitative and/or qualitative methods used to address the questions. Quantitative data involve numbers and specific measurements. For operational assessments, a quantitative method would include the generation of basic frequency distribution tables along with explanations, but with no analysis. Another method for operational assessments would involve explanation of budget, workload, or schedule variances between what was planned versus what actually happened.

Qualitative data involve words and transcripts. Qualitative methods of data collections may include focus groups, debriefings, observations, case studies, and lessons learned, which serves as a significant methodology for operational assessments.

- Describe what data will be used at a high level and how the data will be used.
  - Data required to answer the questions
  - Sources of data
  - Time of data availability
  - Potential limitations/constraints of data
- Describe how data analysis, if applicable, will be performed
- Describe general requirements (e.g., operational requirements, procedural requirements, etc.)

## VI. Risks/Limitations

Project Management Body of Knowledge (PMBOK) 2013 defines risk as an uncertain event or condition that, if it occurs, has a positive or negative effect on a project objective. Are there any risks associated with the successful completion of the operational assessment?

For limitations, discuss confounding factors that require a statement qualifying the results. As an example when using administrative records in the conduct of an operation, use of the linked data may be subject to various errors.

## VII. Measures of Success

Document the criteria that will be used to define successful completion of the operation.

Types of success measures include:

- Process Measures – that indicate how well the process works, typically including measures related to completion dates, rates, and productivity rates.
- Cost Measures – that drive the cost of the operation and comparisons of actual costs to planned budgets.
- Quality Measures – of the quality of the results of the operation, typically including things such as rework rates, error rates, and coverage rates.
- Field Productivity Measures – that indicate degree of lister or enumerator efficiency as measured by productivity rates against expectations.
- Data Quality-Cost Tradeoff Measures – that indicate optimal tradeoffs between data quality and cost involved in the operation, when applicable. This type of measure is not applicable to the 2018 End to End Census Test operations.
- Other measures that are unique to the operation.

## VIII. Division Responsibilities

A list of participating divisions, offices, and/or contractors involved with the development of the operational assessment, along with the tasks for which they are responsible.

## IX. Milestone Schedule (include the month/day/year of milestone activities, if known)

<<Title of Study Plan, Version #.>>

Below are the standard schedule activities for the development of the study plan and operational assessment report. Regard those highlighted in bold block-face as the key milestone activities. Definitions of acronyms are noted in the glossary section.

Activity ID	Activity Name	Orig Duration	Start	Finish
<b>&lt;&lt;operation name&gt;&gt; Assessment Study Plan</b>				
<b>First Draft</b>				
	Prepare First Draft of <<operation name>> Assessment Study Plan			
	<b>Distribute First Draft of &lt;&lt;operation name&gt;&gt; Assessment Study Plan to the Assessment Sponsoring DCMD ADC and Other Reviewers</b>			
	Incorporate DCMD ADC and Other Comments to <<operation name>> Assessment Study Plan			
<b>Initial Draft</b>				
	Prepare Initial Draft <<operation name>> Assessment Study Plan			
	Distribute Initial Draft <<operation name>> Assessment Study Plan to Evaluations & Experiments Coordination Brach (EXC)			
	EXC Distributes Initial Draft <<operation name>> Assessment Study Plan to the DROM Working Group for Electronic Review			
	Receive Comments from the DROM Working Group on the Initial Draft <<operation name>> Assessment Study Plan			
	Schedule the <<operation name>> Study Plan for the IPT Lead to Meet with the DROM Working Group			
	Discuss DROM Comments on Initial Draft <<operation name>> Assessment Study Plan			
<b>Final Draft</b>				
	Prepare Final Draft of <<operation name>> Assessment Study Plan			

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Activity ID	Activity Name	Orig Duration	Start	Finish
	Distribute Final Draft of <<operation name>> Assessment Study Plan to the DPMO and the EXC			
	Schedule and Discuss Final Draft <<operation name>> Assessment Study Plan with the 2020 PMGB			
	Incorporate 2020 PMGB Comments for <<operation name>> Assessment Study Plan			
	Prepare FINAL <<operation name>> Assessment Study Plan			
	Distribute FINAL <<operation name>> Assessment Study Plan to the EXC			
	EXC Staff Distributes the <<operation name>> Assessment Study Plan and 2020 Memorandum to the DCCO			
	DCCO Staff Process the Draft 2020 Memorandum and the <<operation name>> Assessment Study Plan to Obtain Clearances (DCMD Chief, Assistant Director, and Associate Director)			
	DCCO Staff Formally Release the <<operation name>> Assessment Study Plan in the 2020 Memorandum Series			
<b>&lt;&lt;operation name&gt;&gt; Assessment Report</b>				
<b>First Draft of Assessment Report</b>				
	Receive, Verify, and Validate <<operation name>> Assessment Data			
	Examine Results and Conduct Analysis			
	Prepare First Draft of <<operation name>> Assessment Report			
	<b>Distribute First Draft of &lt;&lt;operation name&gt;&gt; Assessment Report to the Assessment Sponsoring DCMD ADC and Other Reviewers</b>			
	Incorporate DCMD ADC and Other Comments <<operation name>> Assessment Report			
<b>Initial Draft of Assessment Report</b>				
	Prepare Initial Draft <<operation name>> Assessment Report			
	Distribute Initial Draft <<operation name>> Assessment Report to Evaluations & Experiments Coordination Br. (EXC)			

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Activity ID	Activity Name	Orig Duration	Start	Finish
	EXC Distributes Initial Draft <<operation name>> Assessment Report to the DROM Working Group for Electronic Review			
	Receive Comments from the DROM Working Group on the Initial Draft <<operation name>> Assessment Report			
	Schedule the <<operation name>> Report for the IPT Lead to Meet with the DROM Working Group			
	Discuss DROM Comments on Initial Draft <<operation name>> Assessment Report			
<b>Final Draft of Assessment Report</b>				
	Prepare Final Draft of <<operation name>> Assessment Report			
	Distribute Final Draft of <<operation name>> Assessment Report to the DPMO and the EXC			
	Schedule and Discuss Final Draft <<operation name>> Assessment Report with the 2020 PMGB			
	Incorporate 2020 PMGB Comments for <<operation name>> Assessment Report			
<b>Final Assessment Report</b>				
	Prepare FINAL <<operation name>> Assessment Report			
	<b>Deliver FINAL &lt;&lt;operation name&gt;&gt; Assessment Report to the EXC</b>			
	EXC Staff Distribute the FINAL <<operation name>> Report and 2020 Memorandum to the DCCO			
	DCCO Staff Process the Draft 2020 Memorandum and the FINAL <<operation name>> Report to Obtain Clearances (DCMD Chief, Assistant Director, and Associate Director)			
	DCCO Staff Formally Release the FINAL <<operation name>> Report in the 2020 Memorandum Series			
	EXC Staff Capture Recommendations of the FINAL <<operation name>> Report in the Census Knowledge Management SharePoint Application			

X. Issues That Need to be Resolved

<<Remove section altogether if there are no issues to be resolved.>>

XI. Review/Approval Table

Role	Electronic Signature	Date
Fact Checker or independent verifier		
Author's Division Chief (or designee)		
DCMD ADC		
DROM DCMD co-executive sponsor (or designee)		
DROM DSSD co-executive sponsor (or designee)		
Associate Director for R&M (or designee)		
Associate Director for Decennial Census Programs (or designee)		
2020 PMGB		

XII. Document Revision and Version Control History

VERSION/EDITOR	DATE	REVISION DESCRIPTION	EAE IPT CHAIR APPROVAL
<b>v. 1.0/Erin Love</b>	<b>12/08/2016</b>	<b>Final draft</b>	<b><i>Randall Neugebauer</i></b>
<b>v.1.2/Randall Neugebauer</b>	<b>04/27/2017</b>	<b>Revisions from a DROM working group review</b>	
<b>v.1.3/Randall Neugebauer/Miranda Chung</b>	<b>05/19/2017</b>	<b>Revisions from Maryann Chapin's review</b>	

XIII. Glossary of Acronyms

Acronym	Definition
ADC	Assistant Division Chief
DCCO	Decennial Census Communications Office
DPMO	Decennial Program Management Office
DROM	Decennial Research Objectives and Methods Working Group
DSSD	Decennial Statistical Studies Division
EXC	Evaluations & Experiments Coordination Branch
IPT	Integrated Project Team
PMGB	Portfolio Management Governance Board
R&M	Research & Methodology Directorate

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#### XIV. References

<<Use The Gregg Reference Manual: A Manual of Style, Grammar, Usage, and Formatting,  
by William A. Sabin, as a style guide.>>