

# **Best Practices for Establishment Web Surveys**

**Grace O'Neill**

**U.S. Census Bureau**

**Establishment Survey Methods Staff**

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# Outline of Presentation

- Overview of Establishment Surveys
- Best Practices for Establishment Web Surveys
- Summary

# Overview of Establishment Surveys

- Questionnaire design
- Data collection

# Overview of Establishment Surveys

- Questionnaire design
  - Factual and open ended
  - Precise technical concepts
  - Primarily paper forms

# Overview of Establishment Surveys

- Data collection
  - Establishment size and structure
  - Authorization requirements
  - Longitudinal surveys
  - Response Burden
    - Record based retrieval
    - Multiple respondents
    - Multiple sessions

# Best Practices for Establishment Web Surveys

- Questionnaire design
  - Working with IT
  - Instructions and text
  - Pre-filled information
  - Tables
  - Edits
  - Remark box

# Best Practices for Establishment Web Surveys

- Data Collection
  - Web survey uptake
  - Multiple sittings
  - Use of paper form
    - Data authorization
    - Multiple respondents
    - Data review
    - Record keeping

# Questionnaire Design



# Working with IT

## Problem:

- IT staff doesn't do what survey management want them too

## Outcome:

- This frustrates both survey management and IT staff and is counterproductive

# Working with IT

## Best Practice:

- Work to understand IT staff
  - Larger relationship issues
  - Ownership of the web form
  - Confines of paper are well known
  - Struggle between IT best practices and survey best practices
  - Use of bells and whistles

# Instructions and text

## Problem:

- Establishment surveys have a significant amount of additional text

## Outcome:

- Respondents are overwhelmed by text and can miss important information

# Instructions and text

## Best Practice:

- Use visual cues to call attention to important information
- Use of help buttons and hyperlinks
- If it appears with the question on the paper form, it should appear with the question on the web form

# Pre-filled information

## Problems:

- There is information that survey managers do not want respondents to change (for example: address and NAICS code)

## Outcome:

- Respondents are frustrated when they can't change pre-filled information

# Pre-filled information

## Best Practice:

- Respondents need to be able to edit pre-filled information
- Changes need to occur on the same page as the problem

# Separate response boxes with instructions

## Facility Information

Company Name

0

Name 2

1234 xyz Street

Address

Anytown

City

Maryland

State

12345

Zip Code

4th Quarter 2006

If the information above is incorrect, please update below.

Company Name

Name 2

Address

City

State

Zip Code

 (#####-####)

# Edit pre-filled answer boxes

Company Name

Name 2

Address

City

State

Zip Code  
 (#####-####)



# Tables

## Problem:

- Many establishment forms are table driven

## Outcome:

- Respondents have problems completing tables in a web format

# Tables

## Best Practice:

- Design tables carefully
  - Automatically resizing tables
  - Scrolling
  - Consider breaking large tables into smaller tables

# Edits

## Problem:

- Edit check can be done behind the scenes without respondents knowledge

## Outcome:

- Respondents are frustrated when they receive error messages for data they didn't enter

# Edits

## Best Practice:

- Edits and any corresponding error messages should be transparent to respondents

# Remarks Box

Problem:

- Respondents don't remember remarks by form end

Outcome:

- Respondent leave remarks box blank

# Remarks Box

## Best Practice:

- Web forms need a remarks box on any page that seems logical
- All remarks boxes need specific instructions

# Data Collection

# Web survey uptake

Problem:

- Low web survey completion rates

Outcome:

- Unhappy survey managers and sponsors



# Web survey uptake

## Best Practice:

- Understand respondent expectation
- Introduce with new survey/ new sample
- Inform respondents
  - Pre-mailings
  - Flyers/ postcards
  - Cover letter

# Multiple Sessions

## Problem:

- Most establishment surveys can not be completed in one session

## Outcome:

- Respondents are hesitant to log out of web form

# Multiple Sessions

## Best Practice:

- Seamless navigation through form
- Simple and clear logging in and out and saving functions
  - Return respondent to expected location
  - Clear notification that the form was saved

# Use of Paper Form

## Problem:

- Survey managers think a web form replaces the the paper form

## Outcome:

- Respondents are not provided access to a paper form
  - Hard to complete survey
  - Hard to maintain records

# Use of Paper Form

## Best Practice:

- Provide respondents with access to an electronic copy of the paper form
- Most respondents prefer .PDF
- Paper forms can be located:
  - “Home” web site
  - Front page/ main menu of web form

# Use of Paper Form

- At the end of the survey, provide respondents with a paper and/ or an electronic copy for their records
  - Ideally, the paper form populated with their answers
  - Can also be a list of questions and answers

# Summary: Questionnaire Design

- Include IT staff in web survey decisions
- Technology should add value, not complication
- Carefully think about changes from the paper form to the web form
- Include a way for respondents to change pre-filled information on the same page as the information

# Summary: Questionnaire Design

- Use tables judiciously
- Make edits transparent
- Remark boxes on all necessary pages



# Summary: Data Collection

- Inform respondents
- Make navigation as seamless as possible
- Respondents pass paper not usernames
- Documentation

# Contact Information

Grace O'Neill

U.S. Census Bureau

Email address:

[grace.e.oneill@census.gov](mailto:grace.e.oneill@census.gov)

Telephone number: 301-763-3537