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
- Name 2
- Address
- City
- State
- Zip Code
- 4th Quarter 2006

If the information above is incorrect, please update below.

- Company Name
- Name 2
- Address
- City
- State
- Zip Code

-- Select One -- (####-####)
Edit pre-filled answer boxes

Company Name
My Company

Name 2

Address
1234 xyz Street

City
Anytown

State
District of Columbia

Zip Code
12345 (####-####)
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 cannot 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 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
Telephone number: 301-763-3537