# Best Practices for Establishment Web Surveys

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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**

- 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

- 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 mangers do not want respondents to change (for example: address and NAICS code)

## Outcome:

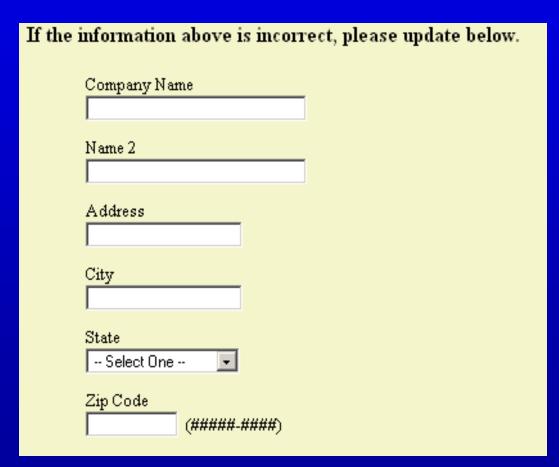
 Respondents are frustrated when they can't change pre-filled information

# **Pre-filled information**

- 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 Π Name 2 1234 xyz Street Address Anytown City Maryland State 12345 Zip Code 4th Quarter 2006



# 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**

- 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**

- 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

- 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**

- 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**

- 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**

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