2020 Census: Mobile Questionnaire Assistance Operation

Project Plan

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Document Purpose

This document is intended for use by U.S. Census Bureau managers, staff, contractors, and other internal and external stakeholders working the 2020 Census. It describes the basic planning and operational control elements of the Mobile Questionnaire Assistance (MQA) operation.

1 Operational Overview

Purpose and Scope of the MQA Operation

The Census Bureau proposed a Mobile Response Initiative in response to the Joint Explanatory Statement accompanying the Consolidated Appropriations Act, 2019 (P.L. 116-6). The Mobile Response Initiative proposes to incorporate the use of technology to provide readily accessible ways for people to respond to the census. The highly mobile locations gave way to naming the operation “Mobile Questionnaire Assistance” or MQA.

The MQA operation is not one of the 35 operations required to execute the 2020 Census, but instead is a sub operation of the Internet Self-Response (ISR) operation. While MQA branches across multiple operations, it most closely aligns with ISR; this decision is outlined in the Memorandum for The Record dated November 26, 2019, with a subject of decision to add Mobile Questionnaire Assistance as a suboperation of the Internet Self-Response operation. Given that the MQA operation was proposed and planned late in the cycle, management believes a project plan with operational details will help ensure the success of this operation.

The Census Bureau will work with partners across the United States to identify key locations with prominent visibility in areas with low self-response rates. Possible locations include grocery stores and markets, houses of worship before and after services, community festivals, public transit hubs, libraries, community centers, and other locations where people naturally congregate. Initially, the MQA locations will be determined based on 2020 projected self-response rates. As households submit responses, real-time response rates will drive the MQA locations. Because this effort is not tied to specific physical locations, MQA staff can dynamically deploy to locations where they are most needed. MQA staff will help respondents answer questions and directly access the census questionnaire on Census Bureau-issued mobile devices in English, or in one of 12 non-English languages, or call for assistance. In addition, MQA staff will also have language assistance guides for 59 non-English languages.

The Census Bureau anticipates certain local and national partners will want to open their own Questionnaire Assistance Centers (“Partner QACs”) to promote the 2020 Census in their areas. This project plan only covers the Census Bureau’s MQA operation, not the Partner QACs, as the
Census Bureau does not oversee partner centers. Partner QACs will not be staffed by Census Bureau personnel or use Census Bureau equipment. Partnership specialists will provide guidance to partners who want to establish QACs.

2 Background

The Mobile Response Initiative builds on and improves the model of the 2010 Questionnaire Assistance Centers (QACs), incorporating the use of technology to provide relevant and realistic ways for people to respond to the 2020 Census. Instead of being tied solely to static locations as in 2010, MQAs can deploy based on actual 2020 Census response rates to low response locations across the country. At MQAs, respondents can receive assistance from trained staff and access the Internet Self-Response instrument to respond to the 2020 Census on demand.

In 2010 the Census Bureau opened 29,157 Questionnaire Assistance Centers (QACs), augmented by 9,670 Be Counted sites. The QACs differed from the Be Counted sites in that QACs employed a temporary census worker at the site for about 15 hours per week, while the Be Counted sites did not provide Census Bureau staff to assist the public. The operation in 2010 resulted in the inclusion of 760,748 people in the Census, an average of about 20 people per QAC/Be Counted site.

Originally, the Census Bureau proposed not to operate QACs in the 2020 Census, given the low number of individuals included in the census per site, and the availability of an Internet Self-Response instrument with non-ID capability, to all respondents (meaning individuals who believed they were not counted and did not need to go to a QAC to obtain a form). However, partners and Congress made clear that they valued the QAC operation. The Census Bureau has proposed the MQA model, believing it augments the 2010 QAC operation while taking advantage of new technologies.

3 Workflow and Systems

3.1 MQA Basic Workflow/Determining MQA Locations

Beginning in January 2020, the Census Bureau started analyzing projected response rate data to identify areas with low self-response rates. Partnership specialists in the six regional census centers (RCCs) will use the information to determine where MQA events should be located for the first several weeks of this operation. They will do so using their knowledge of the area and the established relationships with the local and community organizations. They will examine existing partnership events and reach out to partners who have agreed to host MQA events, if needed. As households submit a response, real-time response rates will determine where MQA
events will be located. Census response representatives (CRRs) will be present at MQA sites to assist the public in responding to the 2020 Census online using the self-response instrument.

The Census Bureau will have two different MQA capacities described below.

**Event-Based** - The CRRs may attend partnership events identified in the partnership Customer Relationship Management (CRM) system. Locations can include festivals, community events, and the like.

**Highly Mobile** - As we begin to receive self-response data, the MQA locations will become more mobile and will be mainly determined based on response data. These locations are highly varied and may include festivals, houses of worship, and places where people naturally congregate.

By March 16, 2020, managers in the area census offices (ACO), in consultation with partnership staff, will use information about projected low response areas to develop a schedule for census response representatives, which will serve as a “soft launch” and several of the first weeks of the operation. These planned MQA locations will be entered into the Customer Relationship Management (CRM) system.

In early April 2020, after the Census Bureau receives sufficient response data to identify areas with low self-response rates, a weekly report will be delivered to the identified partnership and recruiting MQA staff, which will identify low response areas and what, if any, partnership activities are in those areas. Drawing on the information in the report, the partnership specialists will quickly work to establish MQA locations. This information will be communicated to recruiting managers, who will assign CRRs to locations accordingly. CRRs will attend scheduled events with an iPad device in hand to facilitate the completion of the 2020 Census online. The CRRs’ iPads will have a URL that will redirect users to the Internet Self-Response (ISR) instrument; the URL redirect will allow for responses to be tracked to determine that the response came in through the MQA effort. During MQA events, CRRs will place their iPads in Guided Access Mode, which locks respondents out of other applications on the electronic tablets. The Guided Access Mode feature also acts as a necessary data security measure in the event of a lost or stolen tablet. In addition, CRRs can provide a direct URL to respondents that they can type on their own devices and will redirect them to the ISR instrument. The MQA workflow (Section 9) outlines the activities associated with identifying, staffing, and working MQA events.
3.2 Identify MQA CRRs

On the day of an MQA event, the CRRs will bring their Census Bureau-issued tablets to MQA events and will use them to help people complete their census online (whether or not the respondents have their census ID number). In addition, the CRRs will provide respondents with the option to use their own devices to respond online by typing in a URL that will be printed on the census materials at the events. The CRRs will have language guides for assistance and access to language support via the 2020 Census website. If necessary, the CRRs can direct people to the Census Questionnaire Assistance telephone lines. In addition to English, each of the 12 select languages are supported by a direct line for assistance in that language.

CRRs will be identifiable by an ID badge that includes their name, their photograph, a Department of Commerce watermark, and an expiration date. They will be wearing a teal polo shirt with the 2020 Census logo and will have an official bag and a Census Bureau-issued tablet containing the Census Bureau logo. Locations will be identifiable with 2020 Census banners.

3.3 Training

Field Division at headquarters has primary responsibility for developing a schedule for training and producing training materials. Training will cover communication expectations, day-to-day activities, data entry and reporting requirements, and safety precautions.

Partnership specialist and ACO office staff MQA specific training began in February. This training was scheduled to be a day and a half; it covered how to read the weekly report identifying the low response areas, general guidance on what type of events are good candidates for hosting MQA events, how to handle situations where there are no events scheduled in low response areas, and how to schedule a CRR to an MQA event. CRRs are trained on their respective roles and responsibilities for the operation in March. CRR training for those who have currently been performing as recruiting assistants is expected to take approximately five hours. The training covers how to put the iPad in Guided Access Mode, an overview of the ISR, information about how to assist respondents, and inform them of how they will be scheduled for events and provide feedback on the events worked. In some instances, new CRRs will need to be hired due to attrition or in ACOs with a significant number of low response areas. New CRRs will require approximately 12 hours of training.

3.4 Project IT and System Needs

Several existing systems will be impacted by the MQA operation:

Customer Experience Management (CEM)

The CEM system will be adapted and used for the following activities:
Create and disseminate a weekly report highlighting low response areas based on actual 2020 Census response rates and partnership activities currently planned in the low response areas.

- Create new fields for the aforementioned weekly report.
- Create a dashboard that overlays actual and projected response rates with partnership activity. Dashboard allows for on-demand reporting.

### Customer Relationship Management (CRM)

The CRM system will be adapted and used for the following activities:

- Partnership specialists and ACO clerks will utilize CRM to initiate MQA activities and assign the activities to CRRs.
- Create new fields in CRM to allow ACO and RCC staff to track, measure, and monitor CRR work, and the effectiveness of the operation.
- Create custom reports to allow monitoring during the operation.
- Create a CRR survey that will allow the CRR to provide feedback about the MQA events attended.

### URL Redirect to ISR

Two URLs will be established to redirect respondents to the ISR instrument. The URLs utilize Source Tracking in order to provide ISR paradata that will indicate the source of the response. This type of functionality was tested as part of the kiosk solution in the 2018 End-to-End Census Test. One of the URLs will be on the CRR’s tablet and the other will be printed on the MQA banner that CRRs will bring to events. The MQA banners will allow respondents to use their own devices to respond.

For hardware, the team will contract Decennial Devise as a Service (dDaaS) to modify the existing contract that services the devices through the end of the initiative. The MQA operation will utilize existing devices by reformatting them to fit the needs of MQA.

### 4 Project Logistics

Logistics will begin with a needs assessment to identify all artifacts required for the initiative. Artifacts include language assistance guides and materials, Census Questionnaire Assistance materials, training materials, partnership items, partnership materials, and standing banners.
Language assistance guides and materials and Census Questionnaire Assistance materials already exist or are being developed to support the 2020 Census efforts. These materials will be leveraged and used by MQA operations staff. Additional quantities of these items will be printed under existing contracts.

Training materials will be provided to the MQA staff in print and electronic form to use as a reference throughout the initiative.

Any promotional materials produced under the Integrated Communications Contract for the MQA initiative will follow the current procedure of printing in mass through the Government Printing Office (GPO).

Additional orders of promotional materials and items will be placed to support the initiative further. Also, additional partnership standing banner orders will be placed for CRRs to utilize at their activities.

The GPO Fulfillment Center in Laurel, MD, receives the promotional items, promotional materials, and standing banners. GPO packages and ships everything to every ACO around the country. The Census Questionnaire Assistance materials and training materials will be sent directly to the ACOs. ACOs then work to create training and operational supply kits and distributes them to the CRRs.

5 Roles and Responsibilities

The detailed project plan establishes roles and responsibilities, including expectations regarding the frequency and content of communications between these roles. Several new staff will need to be hired and existing staff will need to be extended to support the MQA initiative. The following outlines the staff that need to be hired and the staff that will need to be extended:

- Office operations supervisor – Hire 248 (1 per ACO) for the period of 1/2020 – 8/2020.
- ACO clerks – Hire 496 (two per ACO) for the period of 1/2020 - 8/2020.
- Census response representatives – Extend recruiting assistants from 3/2020 to 8/2020 and hire additional CRRs in ACOs with a significant number of low response areas.
- Recruiters – Extend 496 recruiters (two per RCC) from 8/31/2020 to 9/30/2020.
- MQA coordinators – Hire 6 recruiting coordinators (one per RCC) from 1/2020 to 8/31/2020.
5.1 Area Census Office Staff

ACO Office Operations Supervisors

An office operations supervisor (OOS) will be hired in each ACO to organize and support the planning and implementation of the MQA field operation. They will work from January 2020 to mid-August 2020. OOSs will supervise clerks and schedule CRRs for work at MQA locations. Where possible, OOSs who worked on the recruiting program will transition over to work on the MQA operation.

ACO Clerks

Two clerks will be hired in each ACO to work from January 2020 to mid-August 2020. Clerks will organize supplies and materials, update schedules and reports, and conduct other related clerical duties to support the MQA operation.

Census Response Representatives (CRRs)

In early 2020, individuals serving in ACOs as recruiting assistants will transition to working as census response representatives. Recruiting staff are uniquely positioned and qualified for the MQA operation, as they have the skills necessary to interact with members of the public and explain the importance of the decennial census. In some cases, recruiting assistants will be bilingual, or multilingual, and will be able to assist members of the public who might speak a language other than English.

Area Census Office Recruiting Managers (ACO RMs)

ACO RMs will also continue in employment for the March to August period, but will continue to be called ACO RMs. They will have established relationships with the CRR staff and be familiar with necessary office procedures and timekeeping. RMs will receive minimal necessary training for this operation. The RM job in the March to August time period will be to supervise the CRRs, including selecting which CRR should attend which MQA opportunity.

Area Census Office Managers (ACOMs)

The ACOMs will continue to manage overall ACO activities, including activities that the ACO RMs will manage as part of the MQA operation.
5.2 Regional Census Center Staff

Recruiting Coordinators (RCC RCs)

Recruiting coordinators in the RCCs will be trained and receive communications about the MQA operation and will serve as both technical advisers to the ACO RMs and as liaisons with Census Bureau headquarters.

Partnership Specialists (PSs)

PSs operating out of the RCCs have the primary responsibility of using the predicted response models and information in the CRM to set up the initial wave of locations for the first few weeks of the MQA operation. When sufficient response data (likely after two weeks) are available, PSs are responsible for establishing MQA events for low response areas that do not have a partnership events planned, and confirming a Partnership QAC for CRRs to visit or that a particular partnership event is an appropriate venue for a MQA event. The PS will also meet with the MQA coordinator and RM via a weekly conference call to ensure coordination. The PS’s current role expands to using their knowledge of the communities they serve and various data sources to determine the most effective locations for MQA.

MQA Coordinators

RCCs will hire one MQA coordinator each to work December 2019 to July 2020. These MQA Coordinators will be hired as recruiting assistants. This position is new and has been specifically created to manage MQA operations in each region. The MQA coordinators will meet weekly with partnership specialists, recruiting coordinators, and recruiting managers to ensure coordination between recruitment and partnership and to work through any issues with establishing MQA locations or if there is a lack of CRRs in a particular area. MQA coordinators will work with partnership and recruitment to determine the priorities of events and determine the need for travel as needed.

5.3 Headquarters Staff

Field Division

Field Division staff are responsible for overall management of the field operations for the project, as well as for development of training materials. Specifically, the Decennial Recruiting Branch (DRB) will develop training materials and will provide guidance to support the RCC RC, ACO RM and the OOS, clerks, and CRRs in the ACOs. The 2020 Census Community Partnership & Engagement Program will develop training materials and provide guidance to support the RCC partnership specialists and their managers.
Decennial Census Management Division (DCMD)

DCMD staff are responsible for developing the project plan, providing project management and oversight of the project, and managing the budget. DCMD is also responsible for working with the appropriate Decennial Statistical Studies Division (DSSD) staff to determine the thresholds for the low response areas and for preparing the operational assessment for the project.

ADCOM PMO

The PMO staff is responsible for ordering needed partnership materials. This includes promotional materials, as well as the Guide for Partner QACs, poster with the URL for ISR, MQA informational flyer, the CRR uniform, and the zapunits CRR’s will bring to events.

6 Milestones

<table>
<thead>
<tr>
<th>Month</th>
<th>Activity</th>
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<tbody>
<tr>
<td>November</td>
<td>Finalize Project Plan</td>
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<td>Finalize staffing plan and initiate hiring for new positions</td>
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<td>Update contracts for Field Infrastructure and provide necessary funding</td>
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<tr>
<td>December</td>
<td>Finalize all partnership materials</td>
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<td>2020</td>
<td>January</td>
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<td></td>
<td>Hire New Staff</td>
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<td>Modify DdaaS contract to extend tablets through July</td>
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<td>Complete system modifications</td>
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<tr>
<td>February</td>
<td>Train partnership specialists and ACO management and office staff</td>
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<td></td>
<td>Prepare kits in ACOs</td>
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<td>Partnership Specialists convey initial three weeks of locations to ACOMs</td>
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<tr>
<td>March</td>
<td>Train CRRs</td>
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<td></td>
<td>Soft launch of MQA with a few CRRs begin work on March 24 start of MQA with all CRRs on March 30</td>
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</table>
April | Begin weekly cadence of identifying MQA locations based on actual response data

June | Conduct debriefings with CRRs, partnership specialists, MQA coordinators and other managers.

July | Work concludes at conclusion of NRFU
Conduct lessons learned session for project team

August | Disposition of partnership specialists materials
Collection of data for assessment
Thank You Campaign

September | Begin work on operational assessment

7  **Budget**

The Census Bureau expects that this operation will cost between $100 million and $120 million during FY 2020 to bolster self-response in low response areas.

8  **Project Metrics and Control**

We anticipate controlling this project using the following metrics:

- Response rates in the targeted low response rate areas.
- Number of MQA events scheduled and attended by CRRs.
- CRR feedback on the number of responses received at an event, as well as the number of individuals who were assisted at the events.

9  **Operational Assessment**

The Census Bureau recognizes the importance of assessing the MQA operation, as it is new in the 2020 Census. The operational assessment for MQA will be defined in a separate study plan and assessment under the ISR operation. Some of expected assessment questions include the number of returns included in the Census from MQA events and the results of the CRR feedback survey.
10 MQA Workflow

10.1 Full MQA Workflow

10.2 Lack of Partner & Event-Based QA Sub-Process
10.3 CRRs Unavailable Sub-Process

Recruitment Manager identifies a lack of CRR availability for scheduled events.

Recruitment Manager informs M-QAC Coordinator of a lack of available CRRs.

10.4 ACO Clerk Assigns CRRs in CRM

Recruitment Manager assigns CRR to M-QAC event.

Recruitment Manager sends list of CRRs assigned to events to ACO Clerk

ACO Clerk inputs CRR assignments into system.