

Administrative Challenges and Solutions for a Census Bureau Field Office

Jeff Enos

Program Coordinator

Los Angeles Regional Office

Field Division, U.S. Census Bureau

Two Goals

- Empathy
- Highlight a rich opportunity to save costs

Administrative Tasks in the field offices of the Census Bureau

- A paper-driven bureaucracy
- We'll go through two examples – there are dozens
- How we make these work
- How we have saved money
- Further opportunities for savings

Two Examples

- Tracking Vacant Positions
- Annual Performance Reviews

Tracking Vacant Positions

- Los Angeles Region
 - 1,300 Field Staff (People)
 - 3,500 monthly field assignments
- 15-25% Annual Turnover
- Means 200-300 new people every year
- Also means 500-800 different people doing assignments

Who cares?

- Project manager – needs to get the work done and pay for it
- Field manager – needs someone to do the work
- Recruiter – needs to know where to recruit someone
- Admin – needs to get the person on board and paid
- IT – needs to ensure resources are available

No national system...

- Ad hoc paper process to manage/monitor resources/decisions
- Opportunity for missed steps
- We invented a way to try and manage this...

Electronic Database to input and track applicants and vacancies

The screenshot displays the Microsoft Access application window. The ribbon at the top includes tabs for File, Home, Create, External Data, and Database Tools. The Database Tools tab is active, showing options for Filter, Sort & Filter, Records, Find, Window, and Text Formatting. The main workspace shows a form titled 'frmMainPage' in Form View. The form features a world map background and the title 'LARO APPLICANT REGISTER' in red. Below the title are three menu buttons: 'DATA ENTRY MENU', 'INVITATION MENU', and 'VACANCY WORKSHEET MENU'. A logo is visible in the top right corner of the form. The status bar at the bottom of the form indicates 'Record: 1 of 8' and 'No Filter'. The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the date and time '11:03 AM 2/24/2015'.

As new applicants apply, their information is entered into the database

APPLICANT ROSTER DATA ENTRY FORM

Query by Name (Last, First):

Buttons: Previous Record, Add Record, Edit ALL Applicant Roster, Print Applicant Roster, File Destroy List, Next Record, Save Record, Back To Main, EXIT, Destroy Date Qty, Undo Record, Delete Record, Print Record

Last Name: First Name: Evaluation Code: [_Admin\RECRUITING\FORMS\11_703.pdf](#)

Address: COMMENTS: available any thime

City: Grade:

State: ZIP: PSU: SSFA/FSA:

Main Phone No.: 2nd Phone No.:

Mailing Address:

Mailing City: Mailing State: Mailing Zip:

Email Address:

2nd Language: VetransPreference: Request Date: Update Date:

File Check-Out Date: Check-Out By: File Destroyed Date: Hired By: DOE:

Testing History | Cert Selection | Invitation for Testing

Testing History			
Test Date	<input type="text" value="2/2/2015"/>	Test Type	<input type="text" value="32A"/>
Test Score	<input type="text" value="100"/>	Test Result	<input type="text" value="P"/>

Record: 1 of 1 | No Filter | Search

Last Modified On:

Record: 1 of 8486 of 8486 | Unfiltered | Search

Once a vacancy is identified by the project manager, a vacancy is added to the database

The screenshot displays the Microsoft Access application window titled "Vacancy_Status_and_Tracking : Database (Access 2007 - 2010) - Microsoft Access". The interface features a ribbon with tabs for "File", "Home", "Create", "External Data", and "Database Tools". Below the ribbon is a "Security Warning" bar stating "Application add-ins have been disabled." and an "Enable Content" button. The main content area is titled "Main Menu" and contains the "United States Census Bureau Los Angeles Region" logo, a photograph of people, and the text "Vacancy Status and Tracking Database". Three buttons are visible: "Enter New Vacancy" (blue), "Vacancy List" (green), and "Export Available" (red). To the right is a map of the Los Angeles region with states labeled: Alaska, Washington, Oregon, Idaho, Nevada, California, and Hawaii. A "Navigation Pane" is visible on the left side. At the bottom, the status bar shows "Record: 1 of 1", "No Filter", and "Search". The Windows taskbar at the very bottom shows various application icons and the system clock displaying "11:02/24".

The details of the vacancy (AOC, language needed) are entered here

The screenshot shows the Microsoft Access interface for the 'Vacancy_Status_and_Tracking' database. The main window is titled 'Entry Form'. The form contains the following fields and controls:

- SSF**: A dropdown menu.
- Survey**: A dropdown menu.
- FSA**: A dropdown menu.
- State**: A dropdown menu.
- Area of Consideration for Vacancy**: A section with five sub-fields, each with a blue header button and a text input field:
 - PSU**: Header button, input field contains '06019'.
 - City**: Header button, empty input field.
 - County Name**: Header button, empty input field.
 - Zip Code**: Header button, empty input field.
 - FSA**: Header button, dropdown menu.
- Status**: A dropdown menu with a yellow background.
- Request By**: A text input field.
- Comments**: A large text input area.
- Vacancy Occurred on**: A date input field.
- Language Needed**: A text input field.
- Buttons**: 'Save Record' (green), 'New Record' (orange), 'Clear All' (red), and 'Return to Main Menu' (black).

At the bottom of the form, it displays 'Record: 14 of 594' and 'Unfiltered'. The Windows taskbar at the bottom shows the time as 11:05 AM on 2/24/2015.

The hiring manager can easily see if there are sufficient number qualified applicants in order to request a cert, or if there will need to be recruiting done prior to hiring.

Vacancy_Status_and_Tracking : Database (Access 2007 - 2010) - Microsoft Access

Available

City	State	Zip	PSU	FSA	Language	EvalCode	File Destroy Date
CLOVIS	CA	93611	06019	7683		0	1/8/2017
CLOVIS	CA	93611	06019	7683		0	1/8/2017
CLOVIS	CA	93611	06019	7683		5	2/2/2012
CLOVIS	CA	93612	06019	7683	SPANISH	5	11/12/2016
CLOVIS	CA	93612	06019	7683		0	4/13/2012
CLOVIS	CA	93612	06019	7683		0	1/8/2017
CLOVIS	CA	93613	06019	7683		0	2/1/2013
CLOVIS	CA	93619	06019	7683		0	6/30/2012
CLOVIS	CA	93619	06019	7683		0	4/13/2012
COALINGA	CA	93210	06019	7691	SPANISH	0	10/11/2013
FRESENO	CA	93727	06019	7683		0	1/8/2017
FRESNO	CA	93702	06019	7683		0	11/25/2016
FRESNO	CA	93702	06019	7683		5	6/20/2013
FRESNO	CA	93703	06019	7683		5	11/25/2016
FRESNO	CA	93703	06019	7683	SPANISH	0	11/5/2014
FRESNO	CA	93703	06019	7683		0	11/9/2014
FRESNO	CA	93703	06019	7683		0	6/14/2013

Report View Num Lock Filtered 11:05 AM 2/24/2015

Once a vacancy is defined, administration pulls the qualified applicants based on the selection criteria (geography, language)

The screenshot displays the Microsoft Access application window titled "frmSelectionCertificateMenu - Microsoft Access". The ribbon includes tabs for "File", "Home", "Create", "External Data", and "Database Tools". The "Home" tab is active, showing options for "View", "Clipboard", "Sort & Filter", "Records", "Find", and "Text Formatting".

The main content area is titled "Vacancy Worksheet Menu" and features a grid of buttons for various queries and reports. The buttons are arranged in two columns:

- Left Column:
 - Vacancy Query by City
 - Vacancy Query by ZIP
 - Vacancy Query by PSU
 - Vacancy Query by SSFA
 - Vacancy Query by SSFA City
 - Vacancy Query by SSFA ZIP
 - Vacancy Query by SSFA PSU
 - Complete Qualified Applicant in PSU by Date
- Right Column:
 - Vacancy Query by Language and City
 - Vacancy by Language and PSU
 - Vacancy by Language and ZIP
 - Vacancy by Language and SSFA
 - Vacancy by Language SSFA and City
 - Vacancy by Language SSFA and PSU
 - Vacancy by Language SSFA and ZIP
 - Vacancy Query by Evaluation Code

Below the grid, there are several buttons for reports and actions:

- Applicant Report in Eval-Code Order
- Hired Applicant by Survey
- Hired Applicant by DOE
- Hired Applicant by Survey, DOE
- Check-Out Applicant File by Supervisor
- Back to Main Menu
- Clean Available Applicants
- Exit

The bottom status bar shows "Record: 1 of 1", "No Filter", and a search field. The Windows taskbar at the bottom displays the Start button, several application icons, and the system clock showing "11:03 AM 2/24/2015".

Annual Performance Reviews

- For us
 - Some of us write our own justification
 - Called into the boss's office
 - A short – sometimes awkward – conversation
 - Sign the form
 - Make a copy
 - And that's it!

But what if their “office” was here?



Here?



Or here?



APRs in a Remote Environment

- Still paper – at least 19 pages
- Still “wet ink” signatures
- Still need supervisor’s signature and 2nd level review (signature)
- Still need a copy in the file cabinet

- How do you even do that?

Rating 1,300 FRs on 4 different elements

Name	Resp rating	Resp Adjust (if any)	Resp Adjust justification	Prod Rating	Prod Adj (if any)	Prod Adjust justification	Cust Serv	Cust Serv justification	Admin/IT	Admin/IT justification	Coordinator Notes	SSF/FS General Notes	Rating Score
	3			4			4	FR is flexible and has been co	4		follows all procedures as set by the FS, including		360
	4			3			3		3				340
	3			4			3		3				330
	3			3			3		3				300
	3			3			4	SFR completed additional ob	4		follows all procedures as set by the FS, including		330
	3			3			3		3			Resigned	300
	3			3			4	takes on additional phone ca	4		follows all procedures as set by the FS, including		330
	3	3	FR only does re	3	3	FR only does r	4	helps out other FRs with abs	3			NMC/MMVT only	315
	3			4			4	FR always takes on addition	4		follows all procedures as set by the FS, including		360
	3			3			3		3				300
	1			1			3		3			PIP	160
	3	3	FR also works m	3			3		4		follows all procedures as set by the FS, including		315
	2			4			4	FR very responsive to all FS	4		follows all procedures as set by the FS, including		320
	4			4			3		3				370
	3			4			3		3				330
	3			4			4	FR takes on additional cases	4		follows all procedures as set by the FS, including		360
	3			4			4	FR takes on additional cases	4		follows all procedures as set by the FS, including		360
	3			4			3		3				330
	2			3			3		3			Resigned	260
	3			3			3		3				300
	3			3			3		3				300
	3			3			3		3				300
	3			3			4	FR always takes on addition	3				315
	1			3			3		3			Resigned	220
	3			3			3		3			Located in 71	300
	3			3			3		3				300
	2			3			3		3			FR code corre	260
	1			3			2	FR doesn't return phone call	3				205
	1			1			2	FR doesn't return phone call	3				145
	2			3			3		5		follows all procedures as set by the FS, including		290
	2			3			3		3				260
	3			3			3		3				300
	2			3			3		3			Resigned	260
	2			3			3		3				260

Employee Name: «Name», «FR_Code»		«FSA»	
PERFORMANCE SUMMARY RATING			
<ul style="list-style-type: none"> List each element in the performance plan. All elements are critical. Assign a rating level for each element: <ul style="list-style-type: none"> (5) Level 5 (highest level of performance); (4) Level 4; (3) Level 3; (2) Level 2; (1) Level 1 (unacceptable performance) Score each element by multiplying the weight by the rating level. Interim ratings should be considered when you prepare the final summary rating. After each element has been scored, compute the total point score by adding the individual scores. Rating officials must provide either an overall narrative justification of the summary rating or a written justification for each element rating. A written justification is required for any element rated below Level 3. 			
Performance Element	Individual Weights (Total must equal 100)	Element Rating (5, 4, 3, 2, 1)	Score
Customer Service	15% «Cust_Serv_Prod»	«Cust_Serv_final»	
Interviewing, Listing and Sampling	40% «Interviewing_product»	«Resp_Rating_final»	
Production and Cost	30% «Production_product»	«Prod_Rating_final»	
Administrative and Automation Activities <input type="checkbox"/> <input type="checkbox"/>	15% «AdminIT_Product»	«AdminIT_Final»	
<input type="checkbox"/> Check One: <input type="checkbox"/> Summary Rating <input type="checkbox"/> Interim Rating <input type="checkbox"/> TOTAL SCORE «Final_Score» «M_199_asterisk»			
PERFORMANCE RATING			
9 Level 5 (470 – 500)	9 Level 4 (380 – 469)	9 Level 3 (290 – 379)	9 Level 2 (200 – 289)
Rating Official's Signature/Title			Date
«Rating_Official», «Rating_Official_Title»			
Approving Official's Signature/Title			Date
«Approving_Official», «Approving_Official_Title»			
<input type="checkbox"/> Employee's Signature (indicates appraisal meeting held)		Employee comments attached?	Date
— — Yes __ No			
<input type="checkbox"/> PERFORMANCE RECOGNITION			
Performance Award \$ _____ (%)			
APPROPRIATION CODE: Bureau Code (2 Digits) FY (2 Digits) Fund Code (2 Digits) Project Code (7 Digits) Task Code (3 Digits)			
<small>(Required For Performance Award)</small>			
9 QSI (Level 5 Required)			
Rating Official's Signature/Title			Date
Approving Official's Signature/Title			Date

Mail-merge of appraisal data of all field employees

Lots of paper and shipping for performance appraisals...



Goal 1 - Empathy

- I'm an operational manager
- We do a lot of the same things that you do
 - Mandatory Training
 - Town Halls / Broadcast Messages
 - Personnel and Administrative Tasks
 - Resource and People management
- Huge difference is we do them remotely
 - Over 90% of our staff never work in an office
 - 4% of our managers/supervisors work in an office

Goal 2 – Cost Savings

- Focus of these events is often on using technology to improve survey operations
- Support Activities provide an opportunity for tremendous cost savings
 - Efficiency
 - Better Decisions
 - Integration with the survey tasks

Thank You!