

April 7, 2017

NOTE TO THE REVIEWER OF: OMB CLEARANCE 1220-0141  
“Cognitive and Psychological Research”

FROM: Jennifer Edgar  
Office of Survey Methods Research

SUBJECT: Submission of Materials for Pretesting of the  
Survey of Employer Provided Training: Phase 2

Please accept the enclosed materials for approval under the OMB clearance package 1220-0141 “Cognitive and Psychological Research.” In accordance with our agreement with OMB, we are submitting a brief description of the study.

The total estimated respondent burden for this study is 50 hours.

If there are any questions regarding this project, please contact Jennifer Edgar at 202-691-7528.

## **I. Introduction**

There is significant interest in understanding how employers are able to reach the goal of having a workforce with the skills that are needed to do their jobs. To what extent do workers already have the training that is needed to do their jobs when hired by firms? To what extent are employers finding it necessary to sponsor or directly provide training to their workers? How does the need for employer provided or sponsored training vary by occupation and industry? What are some of the key characteristics of firms and jobs that increase the likelihood that employers are providing or sponsoring training for their employees?

In 1993 and 1995, the Bureau of Labor Statistics fielded a Survey of Employer Provided Training (SEPT), which provided some insight into these important questions. To address a refreshed interest in these same questions, BLS is revisiting this topic and has taken steps to identify what data would be of highest value to data users. Environmental scanning and an academic literature review were conducted to identify current trends and practices, and findings used to develop a set of measurement objectives. This research, the second phase of exploratory work, will get feedback on draft questionnaires (Attachment A), to determine if respondents understand the questions and have access to the information.

## **II. Methodology**

This research includes two components, the second of which will build on the findings of the first.

1. **Employee Interviews.** Up to 20 interviews with employed participants will be conducted. We will aim to interview participants with a variety of occupations and who work for companies from a variety of industries and sizes. Participants will be sent a questionnaire (Attachment A) at least 3 days prior to their interview and asked to complete it and bring it with them to their interview.

See Attachment B for a draft interview protocol, which will be updated if any changes are made to the questionnaire based on interview results. Interviews will be conducted in the OSMR cognitive laboratory.

2. **Employer Interviews.** Up to 20 exploratory interviews will be conducted with establishments from a variety of industries and size classes. See Attachment C for a draft interview protocol, which will be updated if any changes are made to the questionnaire based on interview results. Participants will be sent a questionnaire (Attachment A) at least 3 days prior to their interview and asked to complete it and have it available during their interview. If their interview is to be done over the phone, they will be asked to scan and email or fax it prior to their interview. Interviews will be conducted either at the employer's location or over the telephone.

### **III. Burden Hours**

The 20 employee interview participants will be recruited from OSMR's database of general population study participants via an email solicitation for participation (Attachment D). No burden is associated with recruitment, as only those interested in participating will contact the BLS to arrange scheduling. We expect the survey form to take 15 minutes to complete, and the debriefing interview will take no more than 60 minutes, for a total of 25 burden hours across the 20 participants.

The 20 employer participants will be recruited from a list of prior BLS survey respondents, to take advantage of recent contact information and background information on company size and industry. Emails will be sent to potential participants (Attachment E). No burden is associated with recruitment, as only those interested in participating will contact the BLS to arrange scheduling. We expect the survey form to take 15 minutes to complete, and the debriefing interview will take no more than 60 minutes, for a total of 25 burden hours across the 20 participants.

Total expected burden for this study is 50 hours.

### **IV. Payment to Respondents**

Employee interview participants will receive \$40 for their participation. Employer interview participants will not receive compensation for their participation.

### **V. Data Confidentiality**

Participants interviewed over the phone will be informed of the confidentiality provisions and will be asked for their verbal consent. Employee or employer participants interviewed in person will be asked to sign a consent form (Attachment F) which contains the following confidentiality statement:

In accordance with the Privacy Act of 1974, as amended (5 U.S.C. 552a), you are hereby notified that this study is sponsored by the U.S. Department of Labor, Bureau of Labor Statistics (BLS), under authority of 29 U.S.C. 2. Your voluntary participation is important to the success of this study and will enable the BLS to better understand the behavioral and psychological processes of individuals, as they reflect on the accuracy of BLS information collections. The BLS, its employees, agents, and partner statistical agencies, will use the information you provide for statistical purposes only and will hold the information in confidence to the full extent permitted by law. In accordance with the

Confidential Information Protection and Statistical Efficiency Act of 2002 (Title 5 of Public Law 107-347) and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent.

**Attachments**

Attachment A. Survey Drafts

Attachment B. Employee Interview Protocol

Attachment C. Employer Interview Protocol

Attachment D. Employee Interview Recruitment Email

Attachment E. Employer Interview Recruitment Email

Attachment F. Consent Form

## Attachment A. Survey Drafts

Note: This is the content for the surveys, but they will be formatted to appear similar to standard, formal, production BLS surveys.

## SEPT Employee Questionnaire

DRAFT 4.7.17

OMB Control Number 1220-0141

Expires April 30, 2018<sup>1</sup>

### Instructions

Thank you for participating in this study! Prior to your interview, please complete this survey to the best of your ability. Please keep track of how long it takes you to answer all the questions.

Once you're finished the survey, please either scan and email it to [Edgar.Jennifer@Bls.gov](mailto:Edgar.Jennifer@Bls.gov) or fax it to 202-691-7426. Keep a copy for yourself, as we'll use it during the interview.

### Employee Information

1. Are you currently employed
  - a. Full time – go to 3
  - b. Part time – go to 3
  - c. Self-Employed – end of survey
  - d. Unemployed – retired, disabled, other reason –go to 2
  - e. Other, specify – go to 2
2. Have you worked at a job in the last 12 months?
  - a. Yes – please answer all the following questions about your most recent job
  - b. No – end of survey
3. Which category best describes your regular type of job or work?
  - a. Office, professional, business or management staff
  - b. Sales
  - c. Product assembly, product manufacture
  - d. Repair, installation or service of machines, equipment
  - e. Construction
  - f. Healthcare
  - g. Delivery or driving
  - h. Food service
  - i. Cleaning, maintenance of building, grounds
  - j. Material handling (e.g., stocking, loading/unloading, moving, etc.)

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<sup>1</sup>We estimate that it will take an average of 15 minutes to complete this voluntary survey, including time for reviewing instructions, searching existing data sources, gathering the data needed, and completing this information. If you have any comments regarding this estimate or any other aspect of this survey including suggestions for reducing this burden, please send them to the Bureau of Labor Statistics, Office of Survey Methods Research (1220-0141), 2 Massachusetts Avenue N.E., Washington, D.C. 20212. You are not required to respond to the collection of information unless it displays a currently valid OMB control number.

- k. Farming
  - l. Other, specify
4. How long have you been in your current occupation? \_\_\_ Years \_\_\_ Months
  5. How long have you been in your current position? \_\_\_ Years \_\_\_ Months
  6. What is the name of the company for which you work?
  7. How long have you worked at this company? \_\_\_ Years \_\_\_ Months
  8. Are you employed by a:
    - a. Government
    - b. Private, for-profit company
    - c. Non-profit organization, including tax exempt and charitable organizations
    - d. Working in family business
    - e. Don't know / Refused
  9. Does your company have more than one location?
    - a. Yes. Please answer the questions in this survey about just the location at which you work.
    - b. No
  10. About how many people work for the company at the location where you work?
    - a. Less than 50
    - b. 51 to 250
    - c. 251 to 500
    - d. More than 500
    - e. Don't know

## Formal Training

Key features of formal training are:

1. It is planned in advance,
2. It has a structured format, and
3. It has a defined curriculum or topics to be covered

Formal training *can* be:

- In-person, online, or a combination of both
- Online training can be on demand or done live/in real time
- Conducted by a trainer (e.g., classroom or webinars) or self-administered training (e.g., workbooks or computer tutorials)
- An official apprenticeship program
- Provided by a private vendor through a contract

Formal training **excludes** on-the-job training given by a supervisor or coworker, including mentoring or observations.

11. In the last 12 months/years, has your company provided or financed any formal training for you?
  - a. Yes – continue survey
  - b. No – go to question 14
  - c. Don't know

12. Please indicate which of the following trainings topic, by delivery method, your company has sponsored, funded or provided for you in the last 12 months:

<b>Training Topic</b>	<b>Traditional, in-person Classroom Training</b>	<b>Other in-person training (e.g., seminar, workshop)</b>	<b>Online Training</b>	<b>Combination of In-person or online training</b>	<b>Some other type of formal training</b>
Executive development or leadership					
Managerial or Supervisory					
Safety or occupational safety					
Company Specific Processes, Procedures or Business Practices					
Profession or industry specific (e.g., engineering, accounting, legal)					
Information technology or information systems					
New Hire Orientation					
Sales or customer service					
Production and construction (e.g., manufacturing, installation)					
Communication or interpersonal skills (e.g., writing, presenting or teamwork)					
Basic skills (e.g., elementary reading, writing or arithmetic)					
Clerical or administrative					
Other, specify					

13. In the past 12 months, from which of the following sources did your company obtain or sponsor formal training for you (mark all):

- a. Developed within the company
- b. Community colleges (include tuition reimbursement) – go to 12b
- c. Other academic institutions (include tuition reimbursement) – go to 12b
- d. Private vendors, including online vendors
- e. Trade associations or employer groups
- f. Unions
- g. Other, specify
- h. Don't know

12b. In the past 12 months, has your employer sponsored or financed you taking classes for a degree that is related to your current job?

- a. Yes
- b. No

### Informal Training

Key features of informal training

- 1. Does not have a structured format
- 2. Does not have defined curriculum

Informal training is *usually*

- Done in person, but may be done online if an employee uses online resources to teach themselves something
- Flexible, with a coworker or supervisor adapting it to specific employees or situations

Examples of informal training include:

- Mentoring, shadowing or coaching
- A colleague demonstrating how to use a piece of equipment
- Having a supervisor teach you a job related skill
- Participating in an online forum

14. Please mark which of the following topics you received informal training from your company in the LAST MONTH, and the type of informal training:

<b>Training Topic</b>	<b>Mentoring, Shadowing or Coaching</b>	<b>Job Shadowing or Demonstrations</b>	<b>Learned on my own at work</b>	<b>Other Informal Training</b>
Executive development or leadership				
Managerial or Supervisory				
Safety or occupational safety				
Company Specific Processes, Procedures or Business Practices				
Profession or industry specific (e.g., engineering, accounting, legal)				
Information technology or information systems				
New hire orientation				
Sales or customer service				
Communication or interpersonal skills (e.g., writing, presenting or teamwork)				
Production and construction (e.g., manufacturing, installation)				
Basic skills (e.g., elementary reading, writing or arithmetic)				
Clerical or administrative				
Other, specify				

Employee Demographics

15. What is your current age?

a. \_\_\_ Years

16. Are you male or female?

a. Male

b. Female

17. What is your race?

- a. White
- b. Black or African American
- c. American Indian or Alaska Native
- d. Asian
- e. Native Hawaiian or Other Pacific Islander
- f. Other, specify

18. What is the highest level of education you have completed, or the highest degree you have obtained?

- a. Less than high school
- b. High school or GED
- c. Associate degree or some college
- d. Bachelor's degree or above (includes Masters, PhD, MD, JD, etc.)

19. Do you have a currently active professional certification or a state or industry license? Do not include business licenses, such as a liquor license or vending license.

- a. Yes
- b. No
- c. Don't know

20. How much do you earn before taxes, including tips, overtime and commissions? \$\_\_\_\_ per

- a. Hour
- b. Week
- c. Month
- d. Pay period – twice monthly
- e. Two-week period – 26 payments a year
- f. Year
- g. Other, specify

21. Of the 52 weeks in a year, how many weeks do you usually work? Be sure to count any paid vacation time as weeks worked. If you have not yet worked your full first year, how many weeks do you expect to work?

- a. \_\_\_ weeks per year

22. In a typical week, how many hours do you work? \_\_\_ hours per week

23. Does your employer make available to you a retirement plan other than social security?

- a. Yes
- b. No
- c. Don't know

24. Does your employer make available to you medical, surgical or hospital insurance that covers injuries or major illnesses off the job?

- a. Yes
- b. No
- c. Don't know

25. Do you receive paid leave on your job?

- a. Yes
- b. No
- c. Don't know

26. Are you a member of a labor union or an employee association similar to a union?

- a. Yes
- b. No
- c. Don't know

## SEPT Employer Questionnaire

DRAFT 4.7.17

OMB Control Number 1220-0141

Expires April 30, 2018<sup>2</sup>

### Instructions

Thank you for participating in this study! Prior to your interview, please complete this survey to the best of your ability. Please keep track of how long it takes you to answer all the questions.

Once you're finished the survey, please either scan and email it to [Edgar.Jennifer@Bls.gov](mailto:Edgar.Jennifer@Bls.gov) or fax it to 202-691-7426. Keep a copy for yourself, as we'll use it during the interview.

### Company Information

1. Does your establishment have more than one location?
  - a. Yes. Please answer the questions in this survey about just the location at which you work.
  - b. No
2. Please describe your main business activities.
3. How many employees were on the payroll of your establishment during the pay period that includes the 12<sup>th</sup> of last month? \_\_\_\_\_ employees
4. How many employees were on the payroll of your establishment during the pay period that includes the 12<sup>th</sup> of the month, three months ago? \_\_\_\_\_ employees
5. What type of staff work at your establishment (mark all):
  - a. Full time employees
  - b. Part time employees
  - c. On-call workers
  - d. Temporary help agency workers

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<sup>2</sup>We estimate that it will take an average of 15 minutes to complete this voluntary survey, including time for reviewing instructions, searching existing data sources, gathering the data needed, and completing this information. If you have any comments regarding this estimate or any other aspect of this survey including suggestions for reducing this burden, please send them to the Bureau of Labor Statistics, Office of Survey Methods Research (1220-0141), 2 Massachusetts Avenue N.E., Washington, D.C. 20212. You are not required to respond to the collection of information unless it displays a currently valid OMB control number.

- e. Independent contractors
  - f. Contract company workers
  - g. Other, specify
6. In the past 3 months, how many new employees have been hired at your establishment?
7. Which of the following services does your company contract out for? (mark all)
- a. Payroll or Accounting
  - b. Human Resources
  - c. Production
  - d. Security
  - e. Maintenance
  - f. Other, specify
  - g. No contracting out of services
  - h. Don't know
8. Does company supply contract workers or temporary workers to other companies?
- a. Yes
  - b. No
9. Are any of the employees at your establishment covered members of a labor union or an employee association similar to a union?
- a. Yes, all employees are members of a labor union or similar group
  - b. Yes, some employees are members of a labor union or similar group
  - c. No
  - d. Don't know

## Formal Training

Key features of formal training are:

4. It is planned in advance,
5. It has a structured format, and
6. It has a defined curriculum or topics to be covered

Formal training *can* be:

- In-person, online, or a combination of both
- Online training can be on demand or done live/in real time
- Conducted by a trainer (e.g., classroom or webinars) or self-administered training (e.g., workbooks or computer tutorials)
- An official apprenticeship program
- Provided by a private vendor through a contract

Formal training **excludes** on-the-job training given by a supervisor or coworker, including mentoring or observations.

10. In the last 12 months, has your establishment provided or financed any formal training for employees?
  - d. Yes – continue survey
  - e. No – go to question 17
  - f. Don't know

11. Please indicate which of the following trainings topics, by delivery method, your company has sponsored, funded or provided for employees in the last 12 months, and indicate the type of training:

<b>Training Topic</b>	<b>Traditional Classroom Training</b>	<b>Other in-person training (e.g., seminar, workshop)</b>	<b>Online Training</b>	<b>Combination of In-person or online training</b>	<b>Some other type of formal training</b>
Executive development or leadership					
Managerial or Supervisory					
Safety or occupational safety					
Company Specific Processes, Procedures or Business Practices					
Profession or industry specific (e.g., medical, engineering, accounting, legal)					
Information technology or information systems					
New Hire Orientation					
Sales or customer service					
Production and construction (e.g., manufacturing, installation)					
Communication or interpersonal skills (e.g., writing, presenting or teamwork)					
Basic skills (e.g., elementary reading, writing or arithmetic)					
Clerical or administrative					
Other, specify					

12. In the past 12 months, which of the following sources have you used to provide or sponsor formal training for your employees (mark all):

- g. Developed within the company, at this location
- h. Developed within the company, at another location
- i. Training provided through a contract arrangement with community colleges or other academic institutions
- j. Community colleges or other academic institutions via tuition or tuition reimbursement
- k. Private vendors, including online vendors or product suppliers
- l. Trade associations or employer groups
- m. Unions
- n. Other, specify
- o. Don't know

Employees in Formal Training

13. Thinking about all the employees in your company, how many of them have received at least some formal training in the last 12 months?

- a. 0 percent, no employees have receive formal training in the last 12 months - go to 16
- b. 1 to 25 percent
- c. 26 to 50 percent
- d. 51 to 99 percent
- e. 100 percent, all employees have received formal training in the last 12 months
- f. Don't know

14. Excluding new hires receiving orientation or other new-hire specific training, how many employees have received at least some formal training in the last 12 months?
- a. 0 percent, no employees have received formal training in the last 12 months, other than new hires
  - b. 1 to 25 percent
  - c. 26 to 50 percent
  - d. 51 to 99 percent
  - e. 100 percent, all employees have receive formal training in the last 12 months
  - f. Don't know
15. Thinking about *all* the employees in your company, on average, how many hours would you say each one has spent in formal training over the last 1 month
- a. Less than 1 hour
  - b. 2 to 5 hours
  - c. 6 to 10 hours
  - d. More than 10 hours
  - e. Don't know
16. Over the past 3 years, would you say that number of hours your employees have spent in training related expenses has
- a. Slightly increased
  - b. Significantly increased
  - c. Stayed the same
  - d. Slightly decreased
  - e. Significantly decreased

### Spending on Formal Training

17. In the last 12 months, has your company spent money on (mark all):
- a. Tuition and tuition reimbursement
  - b. Outside trainers or training companies
  - c. Wages and salaries of full time training personnel
  - d. Wages and salaries of part time training personnel
  - e. Other training related expenses
18. Over the past 3 years, would you say that the amount of money your company spends on training related expenses has
- a. Slightly increased
  - b. Significantly increased
  - c. Stayed the same
  - d. Slightly decreased
  - e. Significantly decreased
  - f. Don't know

### Company Background

19. Do employees at this company have access to retirement plans, other than social security?
- a. Yes
  - b. No
  - c. Don't know
20. Do employees at this company have access to medical, surgical or hospital insurance that covers injuries or major illnesses off the job?
- a. Yes
  - b. No

c. Don't know

21. Do employees at this company have access to paid leave?

a. Yes

b. No

c. Don't know

22. In the last 3 years, has this company introduced any new products or production practices?

a. Yes

b. No

c. Don't know

## Attachment B. Employee Interview Protocol

### Introduction

Thanks for agreeing to participate in our study. We are looking for information about how companies train their employees and what information they keep about training. We'll ask you a series of questions, please answer to the best of your ability – but if we ask something you do not know the answer to, please tell us that as it's likely other people wouldn't know either.

The information you provide will be used for research purposes only, and only seen by the researchers involved in the project. I expect the interview to take about an hour, and really appreciate your time. Any questions before we begin?

*Respondents will read and sign consent form.*

### General Survey Feedback

1. Thanks for completing the survey. Overall, how was it for you?
2. How long did it take you to fill out?
3. Did any of the questions stand out to you for any reason?
4. Were any of the questions particularly hard? Were you unable to answer any?
5. Would you have any concerns filling this survey out again?

### Employee Information Section

Now I'd like to go through some of the specific questions on the survey to get your reactions. Starting with the first page, where we asked about you and your job.

1. Looking at this first section of the survey, were any of these questions difficult?
2. We asked you to categorize your job. Can you tell me how you selected [fill response]?
  - a. Did the categories make sense to you?

3. Did the answer choices in number 7 make sense? Were you sure how to categorize your company?
4. What about number 10, how confident are you that your answer is right?
5. What is the name of the company you work for? What address is your work location?

### Formal Training Section

The next section asked about formal training offered by your company.

1. Did the definition of formal training make sense to you?
  - a. Is formal training something you've heard of before?
  - b. Were there any other types of training that you wondered if should be included?
  - c. Does your company offer any other types of training that you think should be listed?
2. We asked you to think about formal training over the last 12 months. Was that easy or difficult?
  - a. Tell me about the process you used to remember the training you received
  - b. Do you think that you were able to accurately remember the training you got 12 months ago?
  - c. What about 6 months ago? 3 months?
  - d. Our goal is to get as much information as possible, so we'd like to ask about a year, but know that it may be difficult for people to remember that far back. How far back do you think we should ask people about?
3. We gave you a table and asked you to mark off training you received, broken out by topic and type of training. Let's look at the columns first. Did each of these categories make sense to you?
  - a. Were any less clear than others?
  - b. Does your company offer each of these to its employees?
4. Can you give me examples of:

- a. Traditional, in-person, classroom training
  - b. Other in-person training
  - c. Online training
  - d. Combination of in-person and online training
  - e. Some other type of formal training
5. Now, looking at the training topics. Did each of these categories make sense to you?
- a. Were any less clear than others?
  - b. Does your company offer each of these to its employees?
6. You noted that you'd received [fill cells marked yes]. Can you tell me about that training?
- a. [probe for mode/topic/source/timeframe]
  - b. How sure were you that you put it in the right box?
7. In question 13, we asked about where your training came from. Did this question make sense to you?
- a. Are you familiar with the source of the training you take?
  - b. You said your training came from [fill answers], how do you know that?
  - c. [probe for any inconsistencies from grid]
8. The last question in this section asked if your employer sponsored or financed you taking classes for a degree related to your current job. What does that question mean to you?
- a. You said [fill answer]. Can you tell me more about that?
  - b. Who should say yes to that question?

### Informal Training Section

The next section of the survey asked about informal training.

1. Did the definition of in formal training make sense to you?
  - a. Is informal training something you've heard of before?

- b. Were there any other types of training that you wondered if should be included?
    - c. Does your company offer any other types of training that you think should be listed?
2. Like the previous section, we asked you to indicate the types of informal training you've received from your company in the last 1 month.
  - a. For this type of training, we thought it might be more difficult for people to remember, so are only asking about one month's worth. Do you think you were accurately able to remember all the informal training you've received in the past month?
  - b. Would you be able to answer the questions accurately for the last 3 months?
  - c. How far back do you think people could accurately remember this information?
3. Looking at the columns, we included several types of informal training. Did each of these make sense to you?
4. Can you provide examples of:
  - a. Mentoring
  - b. Job shadowing or demonstrations
  - c. Learned on my own at work
  - d. Other informal training
5. Here we used the same training topics. Do they all make sense to you when thinking about informal training?
  - a. Are any confusing or difficult in this context?
6. You said [probe for each checked box]. Can you tell me about that?

### Employee Demographics Section

The last section of the survey asked for some background information about you.

1. What is your reaction to this section?
2. Why do you think we'd ask this information on a survey about training?
3. Did any of the questions stand out to you for any reason?

4. Were any difficult to answer?
  - a. Confusing?
5. Question 18 asked for your pay. How did you go about figuring out your answer?
6. Question 19 asked how many weeks you work in a year. How did you go about figuring out your answer?

### Closing

Thank you for your feedback on this survey, it's been very helpful! Do you have any other comments or suggestions before we wrap up?

## Attachment C. Employer Interview Protocol

### Introduction

Thanks for agreeing to participate in our study. We are looking for information about how companies train their employees and what information they keep about training. We'll ask you a series of questions, please answer to the best of your ability – but if we ask something you do not know the answer to, please tell us that as its likely other people wouldn't know either.

*The information you provide will be used for research purposes only, and only seen by the researchers involved in the project. I expect the interview to take about an hour, and really appreciate your time. Any questions before we begin? [Administer consent form/ read: *The BLS, its employees, agents, and partner statistical agencies, will use the information you provide for statistical purposes only and will hold the information in confidence to the full extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act of 2002 (Title 5 of Public Law 107-347) and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent. This voluntary study is being collected by the Bureau of Labor Statistics under OMB No. 1220-0141. We will use the information you provide for statistical purposes only. Your participation is voluntary, and you have the right to stop at any time. We estimate it will take 60 minutes to complete this research study.**

### Experience Completing Survey

1. Thanks for completing the survey. Overall, how was it for you?
2. How long did it take you to fill out?
3. Did any of the questions stand out to you for any reason?
4. Were any of the questions particularly hard? Were you unable to answer any?
5. Would you have any concerns filling this survey out again?

### Company Information

The first set of questions asked for background information about your company.

1. Were any of these questions difficult to answer?

- a. Confusing?
2. Question 3 asked for the number of employees on the payroll on the 12<sup>th</sup> of last month. How did you go about answering that question?
  - a. Did you use the same process when asked about three months ago in question 4?
3. Question 5 asked what type of staff work at your company. Were you familiar with all of the types of workers?
  - a. [if answered on call] You reported having on-call workers, can you tell me about those?
  - b. [if answered temp help agency] You reported having temporary help agency workers, can you tell me about those?
  - c. [if answered independent contractors] You reported having independent contractors, can you tell me about those?
  - d. [if answered contract company workers] You reported having contract company workers, can you tell me about those?
  - e. [if answered other] You said you also had [fill response]. Can you tell me about those?
4. Question 7 asked “Which of the following services does your company contract for?” What does that question mean to you?
5. Same for Question 8, what does this question mean to you “Does your company supply contract workers or temporary workers to other companies?”

### Formal Training

1. One set of questions asked about formal training. Can you give me some examples of formal training?
2. Was it clear what training should be include as formal training? Excluded?
  - a. Was there any training that your company offered in the last X months that you weren't sure whether to include?

3. [Q10] You said that your company has / has not provided or financed any formal training for employees. Can you tell me about that?
4. [show Q11 grid] This is one of the questions you answered. Did all the training topics make sense to you? Are there any that you aren't familiar with?
  - a. [if other marked] tell me about that training.
5. Now look at the column titles, did all of these types of training make sense?
  - a. Does your company offer each of these?
  - b. Are there other types of training your company offers that isn't listed here?
  - c. [if other marked] tell me about that training.
6. [probe to find out about the individual trainings indicated in the grid. Get enough information to ensure that the right box is marked]

### Formal Training Section

The next section of the survey asked about formal training.

1. Did the definition of formal training make sense to you?
  - a. Is formal training something you've heard of before?
  - b. Were there any other types of training that you wondered if should be included?
  - c. Does your company offer any other types of training that you think should be listed?
2. We asked you to think about formal training over the last 12 months. Was that easy or difficult?
  - a. Tell me about the process you used to determine if formal training had been sponsored or financed in the last 12 months.
  - b. Do you think that you were able to accurately remember the training your company sponsored or financed in the last 12 months?
  - c. What about 6 months ago? 3 months?

- d. Our goal is to get as much information as possible, so we'd like to ask about a year, but know that it may be difficult for people to remember that far back. How far back do you think we should ask people about?
3. We gave you a table and asked you to mark off training you received, broken out by topic and type of training. Let's look at the columns first. Did each of these categories make sense to you?
  - a. Were any less clear than others?
  - b. Does your company offer each of these to its employees?
4. Can you give me examples of:
  - a. Traditional, in-person, classroom training
  - b. Other in-person training
  - c. Online training
  - d. Combination of in-person and online training
  - e. Some other type of formal training
5. Now, looking at the training topics. Did each of these categories make sense to you?
  - a. Were any less clear than others?
  - b. Does your company offer each of these to its employees?
6. You noted that your company had sponsored [fill cells marked yes]. Can you tell me about that training?
  - a. [probe for mode/topic/source/timeframe]
  - b. How sure were you that you put it in the right box?
7. In question 13, we asked about where your training came from. Did this question make sense to you?
  - a. Are you familiar with the source of the formal training offered?
  - b. You said your training came from [fill answers], how do you know that?
  - c. [probe for any inconsistencies from grid]

## Employees in Formal Training

In the next section, we asked questions about employees that took formal training from your company.

1. What is your reaction to these questions?
2. Were any of them difficult to answer?
3. How confident do you feel in the accuracy of your answers?
4. Question 14 asked about the percent of employees who received training in the last 12 months. How did you go about answering that question?
  - a. Do you think your answer is accurate?
  - b. Again, we're trying to balance the amount of information with the difficulty of the question. Do you think 12 months is a reasonable time frame for this question?
  - c. How long back do you think you could answer for and be completely confident in your answer? A month? 3 months? 6 months?
5. In Question 15, we asked the same question but for you to exclude new hires and orientation. What was your process for answering that question?
  - a. [if necessary] Did it differ from answering about all formal training?
  - b. Do you think your answer is accurate?
  - c. Would you recommend the same or different time period for this question?
6. We also asked the number of hours each employee has spent, on average, in formal training over the last 3 months. Please tell me how you went about answering that question.
  - a. Was this question easy or difficult to answer?
  - b. Do you think your answer is correct? How off might it be?
  - c. What time period could we use to ensure that you were able to get an accurate response?

## Spending on Formal Training

1. The last section asked if your company has spent money on training in the last 12 months.

What is your reaction to that request?

- a. Did each of the categories make sense?
- b. Can you explain what each means:
  - i. Tuition
  - ii. Outside trainers or training companies
  - iii. Wages and salaries of full time training personnel
  - iv. Wages and salaries of part time training personnel
  - v. Other training related expenses
    1. [if selected] What did you include here?
- c. If we had asked you to report how much money the company has spent on each of these types of training, would you have been able to answer that question?
  - i. For the last 12 months? 6 months? 3 months?
  - ii. How would you get that information?

### Employee Background

Before we wrap up, I'd like to get some information about your role in your company. This will help us understand your situation and how it may be similar or different from others.

1. What is your job title?
2. Can you tell me a little about your role in the company?
3. What department do you work for?
4. How long have you been with this company?
5. How long have you been doing this type of work?
6. Do you think you would be the one who would receive this type of survey?
  - a. Would you answer it?

## Closing

Thank you for your feedback on this survey, it's been very helpful! Do you have any other comments or suggestions before we wrap up?

Attachment D. Employee Interview Recruitment Email

Hello,

I am a researcher at the U.S. Bureau of Labor Statistics (BLS), and I'm reaching out to ask for your help. You've been selected to participate in this one-time study based on your current employment status. If you are no longer employed, please let me know.

We are developing a new survey looking at training that companies provide their employees. To ensure our survey reflects real-life experiences, we're conducting interviews to understand what training is provided, what topics are covered, and what training types are used. These interviews are vitally important to ensure that we're measuring what is relevant to employers.

For this project, there are two parts. First, we'll send you a survey form for you to complete. Then we'll do an interview to get your feedback on the survey. The interview will take less than an hour and will be scheduled at a time convenient for you. You'll come to our office in DC, next to Union Station, to participate in the interview.

I hope you will help us inform development of this important survey. Please call or email me to set up an appointment or if you have any questions.

Thank you!

***Stella Godbolt***

Recruiter, Behavioral Science Research Center  
Office of Survey Methods Research  
Bureau of Labor Statistics

## Attachment E: Email Solicitation Template

Hello,

I am a researcher at the U.S. Bureau of Labor Statistics (BLS), and I'm reaching out to ask for your help. You've been selected to participate in this one-time study based on your recent response to the BLS Occupational Employment Statistics (OES) report. Again, thank you for your response to that survey!

We are developing a new survey looking at training that companies provide their employees. To ensure our survey reflects real-life experiences, we're conducting brief interviews to understand how training is provided, what topics are covered, what records are kept, and what questions companies would like to have answered about employee training in their industries. These interviews are vitally important to ensure that we're measuring what is relevant to employers.

For this project, we'd like to talk with someone at your company who is knowledgeable about employee training. We'll send you a survey form for you to complete. Then we'll do an interview to get your feedback on the survey. The interview will take less than an hour and will be scheduled at a time convenient for you. We can come to you or conduct the interview over the telephone.

I hope you will help us inform development of this important survey. Please call or email me to set up an appointment or if you have any questions.

Thank you!

***Stella Godbolt***

Recruiter, Behavioral Science Research Center  
Office of Survey Methods Research  
Bureau of Labor Statistics

CONSENT FORM

The Bureau of Labor Statistics (BLS) is conducting research to increase the quality of BLS surveys. This study is intended to suggest ways to improve the procedures the BLS uses to collect survey data.

The BLS, its employees, agents, and partner statistical agencies, will use the information you provide for statistical purposes only and will hold the information in confidence to the full extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act of 2002 (Title 5 of Public Law 107-347) and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent. The Privacy Act notice on the back of this form describes the conditions under which information related to this study will be used by BLS employees and agents.

During this research you may be audio and/or videotaped, or you may be observed. If you do not wish to be taped, you still may participate in this research.

We estimate it will take you an average of 60 minutes to participate in this research (ranging from 45 minutes to 60 minutes).

Your participation in this research project is voluntary, and you have the right to stop at any time. If you agree to participate, please sign below.

Persons are not required to respond to the collection of information unless it displays a currently valid OMB control number. The OMB control number is 1220-0141 and expires April 30, 2018.

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I have read and understand the statements above. I consent to participate in this study.

\_\_\_\_\_  
Participant's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Participant's printed name

\_\_\_\_\_  
Researcher's signature

## PRIVACY ACT STATEMENT

In accordance with the Privacy Act of 1974, as amended (5 U.S.C. 552a), you are hereby notified that this study is sponsored by the U.S. Department of Labor, Bureau of Labor Statistics (BLS), under authority of 29 U.S.C. 2. Your voluntary participation is important to the success of this study and will enable the BLS to better understand the behavioral and psychological processes of individuals, as they reflect on the accuracy of BLS information collections. The BLS, its employees, agents, and partner statistical agencies, will use the information you provide for statistical purposes only and will hold the information in confidence to the full extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act of 2002 (Title 5 of Public Law 107-347) and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent.