



March 9, 2009

MANAGERS, FINANCE, CS&S DISTRICTS  
MANAGERS, STATISTICAL PROGRAMS, CS&S DISTRICTS

SUBJECT: Guidelines for Using Data Collection Resources

The U. S. Postal Service is facing an epic climate of sharply declining mail volume and revenue shortfalls. Efforts to cut costs continue by consolidating mail processing operations where feasible; eliminating overtime and reducing work hours; and, not filling vacancies. Statistical Programs is not immune to these cost cutting measures. And yet we must maintain a consistent flow of quality data during these difficult times. The data collected remains vital to postal management for revenue, volume and cost reporting.

The purpose of this letter is to provide guidelines that can be applied locally. These guidelines do not replace or change current statistical programs policies but are meant to provide the flexibility to assure continued collection of quality statistical programs data while minimizing the impact on the derived statistical estimates. These guidelines should help you make the decisions on how best to use the resources available to you while reducing costs.

The following measures may be implemented immediately:

1. For the remainder of the fiscal year, suspension of Process Reviews that require travel.
2. For the remainder of the fiscal year, suspension of the requirement that *all* PATS training be conducted face-to-face when travel would be required. MeetingPlace may be used.
3. For the remainder of the fiscal year, suspension of On-Site MEP reviews.
4. For the remainder of the fiscal year, suspension of the requirement that quarterly training be conducted in classroom style at least once a year.
5. Labor saving testing techniques for many of the statistical programs. (See attached guidelines.)

The following measures will be implemented FY2010:

1. Reduction of scheduled tests for some statistical programs.
2. For IOCS, there will be no panel rotations unless a significant number of offices in the CAG advance/relegate or close. In addition, no customer service offices will be added to the panel due to advancement to CAG A or B.

There may be times when resources are not available to complete all tests. When this occurs, the following guidelines may be used:

1. If there are no trained data collectors to take tests in a specific program, reschedule the test.

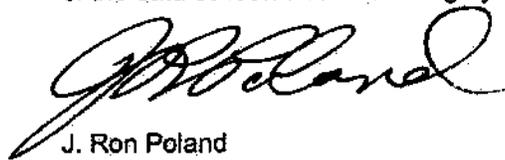
2. The order of priority when scheduling resources is SIRVO-IODIS, SIRVI, TRACS, Carrier, IOCS, ODIS-RPW. This prioritization should be used to resolve resource scheduling conflicts on particular days; it is not to be used to eliminate entire statistical programs on an ongoing basis.
3. Refer to the Attachment for guidelines on labor saving testing techniques for specific statistical programs.

The Attachment provides guidelines for specific statistical programs. These guidelines may be used until further notice. Procedures for statistical programs not covered in the Attachment are unchanged. Changes that impact NPA calculations will be evaluated and discussed with senior management.

Statistical Programs staff are continuing to review data collection procedures and sample selection allocations, and to investigate alternatives. Many ideas considered short-term and thought to be easy to implement have significant statistical impacts and require careful study prior to implementation. For this reason, system design and sample size recommendations will be examined, evaluated, and (if approved) implemented in FY2010.

There will be many challenging opportunities for all of us. Our primary objective in Statistical Programs is to maintain a consistent flow of quality data. Please ensure that data collectors understand how to apply the guidelines outlined in this letter to ensure quality and data integrity. The Statistical Programs Service Center will be conducting telecons by Area beginning the week of March 16, 2009, to provide clarification and to answer any questions.

We appreciate the continued support of you and your statistical programs staff to ensure the quality of the data collected and the integrity of the statistical programs.



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Manager  
Statistical Programs

Attachment

cc: Mr. Corbett, CFO  
Mr. Lyons  
Mr. Foucheaux  
Finance Managers, Areas  
Accounting Managers, Areas  
Statistical Programs Liaisons, Areas  
Managers, Statistical Programs, HQ  
Mr. Colvin  
Ms. Mayes  
Ms. Vetter, Senior Manager, Ernst and Young  
Ms. Hilderbrand, Office of Inspector General

## **GUIDELINES FOR SPECIFIC PROGRAMS**

### **SIRVO-IODIS**

SIRVO-IODIS tests should not be rescheduled or canceled outside of the existing policy. If resources are limited and **if** the GBS Dispatch has already selected 4 receptacles for the test, data collectors may "return" receptacles selected by GBS Dispatch without sampling.

### **SIRVI**

SIRVI tests should not be canceled outside of the existing policy. If resources are limited, and **if** the GBS Dispatch has already selected 5 receptacles for a given stream (country, mode, class, and receptacle type) for the test day, data collectors may "return" receptacles selected by GBS Receipt without sampling.

### **TRACS Highway and Rail**

There may be an occasion when conducting a TRACS Highway or Rail test by phone is an option. Collecting the test data by phone must meet the following requirements:

1. The MSP must call the SPSC for permission to conduct the low volume Highway or Rail test by phone several days ahead of the test date. The following information must be provided:
  - Volume history from TIMES.
  - Amount of travel time and/or overtime to conduct the test.
2. Telephone respondent must be knowledgeable facility personnel who know the container type, item type, mail classification, as well as vehicle utilization information, and how to set aside the test mail.
3. The data collector when conducting the test after pressing <F5> - Notes in the *Header* screen must record the name and telephone number of the person conducting the test at the office. For example, "Phone test, Contact John Doe, phone (000) 123-4567".

It is extremely important that the sample data collected by phone be accurate and complete.

### **Rural Carrier Cost - RCCS**

There may be occasions when conducting the rural carrier test by telephone is an option. Procedures may be found in Handbook F-65, section 4.4

### **ODIS-RPW**

#### 1. Rescheduling

To maximize the use of available resources, local staff should use the following guidelines to reschedule ODIS-RPW tests. Reschedules are allowed before and after the original scheduled date.

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|--------|---|
| Type 1 | Tests originally scheduled for a Sunday or Monday<br>Tests must be rescheduled to the <b>exact</b> same day of the week as originally scheduled.              |
| Type 2 | Tests originally scheduled for a Tuesday or Wednesday<br>Tests can be rescheduled to <b>any</b> Type 2 test day, i.e., any Tuesday or Wednesday.              |
| Type 3 | Tests originally scheduled for Thursday through Saturday.<br>Tests can be rescheduled to <b>any</b> Type 3 test day, i.e., any Thursday, Friday, or Saturday. |

Mail volumes are very different for some days of the week, and for days around a holiday. To make sure that processing volumes are accurate, the following situations should be avoided:

- Rescheduling tests so that it changes type;
- Rescheduling tests in Type 1 to a different day of the week;
- Rescheduling a test which was originally scheduled within five (5) days of a holiday (either before or after); and,
- Rescheduling a test outside of the originally scheduled month.

## 2. Tests Requiring Excessive Travel

### Telephone Tests

Testing may be conducted over the telephone if resources do not permit on-site testing, provided that they are conducted and overseen by a trained data collector. Telephone respondents must be capable and willing to follow all tasks involved with conducting the test. Larger skip intervals from the table may be used to keep the recording time to the availability of respondent.

### Upstream Testing

Where practical, MEPs defined downstream at the destinating facility may be tested upstream provided that (1) every mailpiece is associated with one and only one MEP; (2) every mailpiece in each MEP is easily isolated for testing; (3) MEP is relatively stable over time; and, (4) cost-effectiveness of testing is maximized for each MEP. Depending on how the MEP is designed, follow-up telephone calls to the downstream facility might be necessary to ensure that no mail bypassed the MEP being tested upstream.

Corresponding to the weekly ODIS-RPW processing schedule, all test IDs associated with MEPs defined downstream but were tested upstream must be sent to the SPSC.