

## **2009 Census Rehearsal Evaluation Field Supplies (Logistics)**

December 2009

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## **2009 Rehearsal – Field Supplies (Logistics)**

### **1. Definition and scope for rehearsal**

Distribution of enumeration materials to and from the field and disposal of surplus material after enumeration.

Scope for the rehearsal was to ensure two Census Regional Managers (CRM), three Census District Managers (CDM), ten Census Team Leaders (CTL), and 109 Enumerators working from the Edinburgh and Stornoway field offices received the necessary materials to carry out their duties in the field.

#### **What was tested:**

- scheduled delivery/collection arrangements (including labelling and manifests);
- delivery and collection ad-hoc requests;
- Worldwide Distribution Management (WDM) online system ;
- stock control system;
- creation and completion of Field Management Information System (FMIS) reports;
- picking and packing of enumeration materials;
- field staff training and clarity of instructions;
- use of field offices (distribution and storing of field materials);
- use of other field materials; and
- barcode scanning system.

#### **What could not be tested:**

Disposal of field materials.

## 2. Evaluation findings

Pre – determined evaluation points

### Field Supplies

Description	Success Criteria	Outcome	Recommendation	Timeframe
1) Sourcing – process, timeline, availability, choice	Sufficient number of companies bid for contract.	Not achieved: Poor response to the “Invitation to Tender”. Went out to three companies and only one responded	The procurement for 2011 will follow the Official Journal of the European Union (OJEU) route. Due to the value of contract, this will hopefully encourage more responses.	July/Aug 2009
2) Procurement – process, timeline	Procurement completed on time.	Achieved: All contract requirements were completed and supplier was in place and operational to meet first deadline.	As 2011 is a bigger procurement exercise, early engagement and collaborative working between Field Operations Branch (FOB); the Procurement team and the Contract management is vital.	July 09 to Feb 10
3) Picking and packing service	Were the quantity/quality of goods as per requirement.	Achieved: a) One or two discrepancies, but overall very good. Slight issue at the start with the contents list not being enclosed with	a) Retain similar methods with minor amendments and enhancements.	July 10 to March 11

Description	Success Criteria	Outcome	Recommendation	Timeframe
		<p>the picked and packed goods, but quickly rectified.</p> <p><b>b)</b> Very few issues with quality of products, except one in particular – marker pens.</p>	<p><b>b)</b> Need to be more specific with regards to product quality without being too prescriptive.</p>	

**Logistics**

Description	Success Criteria	Outcome	Recommendation	Timeframe
<p><b>4)</b> Condition of packages received</p>	<p>No damaged packages.</p>	<p>Partly Achieved:</p> <p><b>a)</b> There was evidence at point of delivery (as well as some feedback from the field) that the original boxes were too weak.</p> <p><b>b)</b> The robust boxes tested were stronger, however there was feedback from field staff/logistics service provider about the lack of handles, making the boxes difficult to lift.</p>	<p><b>a)</b> Purchase robust boxes with handles.</p> <p><b>b)</b> Spring loaded boxes are required</p>	<p>Sept 2010</p>
<p><b>5)</b> Labelling Procedures (outbound and inbound)</p>	<p><b>a)</b> Did right supplies get to right field offices?</p>	<p>Achieved:</p> <p><b>a)</b> All supplies were delivered to the correct office.</p>	<p><b>a)</b> Retain similar methods with minor amendments and enhancements. Logistics Integrated Project</p>	<p>Aug 10 to May 11</p>

Description	Success Criteria	Outcome	Recommendation	Timeframe
	<p><b>b)</b> Did right supplies get to the right field staff?</p> <p><b>c)</b> Did field managers manage the labelling of inbound boxes without problems?</p>	<p><b>b)</b> No feedback to suggest otherwise.</p> <p><b>c)</b> Census field staff managed the inbound process without any major difficulties. Field laptops/office personal computers (PC) did not automatically allow internet browser pop-ups, which complicated the interface with the logistics provider's instructions for the return/collection of field materials (labels and manifest).</p> <p><b>d)</b> A lot of intervention was required by Census Headquarters (CHQ) to ensure that the Census Coverage Survey (CCS) collection happened to schedule.</p>	<p>Team (IPT) will discuss and agree requirements/ processes for 2011 with interfaces.</p> <p><b>b)</b> As above</p> <p><b>c)</b> Laptops/office PCs should be set up to automatically allow pop-ups.</p> <p><b>d)</b> FOB and CCS to agree responsibilities and process for 2011.</p>	

Description	Success Criteria	Outcome	Recommendation	Timeframe
<p><b>6)</b> Logistics/Print interface</p>	<p>Supplies ready from printer on required dates</p>	<p>Achieved:</p> <p><b>a)</b> All supplies were ready as required.</p> <p><b>b)</b> The number of pallets/yorks to be uplifted was more than the logistics provider had been led to believe. Impact could have been serious and costly, second lorry may have been required, the delivery schedule would have been affected with materials not being available when required.</p> <p><b>c)</b> A lorry seal had been broken by Customs staff, however this was never reported to Census Headquarters (CHQ)</p>	<p><b>a)</b> Retain similar methods with minor amendments and enhancements.</p> <p><b>b)</b> IPT will discuss and agree the necessary requirements/processes i.e. warehousing, palletising of materials per training event, method of communicating actual volumes etc.</p> <p><b>c)</b> Agree process for incident reporting with logistics service provider.</p>	<p>Sept 10 onwards</p>
<p><b>7)</b> Logistics/Postal service provider (PSP) interface</p>	<p>Were post-out supplies delivered to correct postal service provider premises, in sufficient time to be delivered to households in the pre-define time interval before rehearsal day?</p>	<p>Achieved:</p> <p><b>a)</b> All post-out supplies delivered on the correct date as agreed.</p>	<p><b>a)</b> Retain similar methods with minor amendments and enhancements e.g. need to agree a logistics solution between interfaces for delivering consumables</p>	<p>Late Feb 11/early March 11</p>



Description	Success Criteria	Outcome	Recommendation	Timeframe
		<p><b>b) Minor issues over packing of consumables (yorks/trays) – breaching postal service providers Health &amp; Safety policy.</b></p>	<p>(yorks/trays) to print provider and back to PSP premises – see Postal Services evaluation.</p> <p><b>b) PSP has since confirmed packing of consumables requirements which will be noted and adhered to for 2011.</b></p>	
<p><b>8) Logistics/field and remote office interface</b></p>	<p><b>a) Were supplies delivered on required date and in required manner?</b></p> <p><b>b) Were completed questionnaires and other material collected on required dates and in required manner?</b></p>	<p>Achieved:</p> <p><b>a) All delivery/collections were achieved as agreed.</b></p> <p><b>b) The high volume of materials returned by enumerators, impacted on the storage space at the field office.</b></p> <ul style="list-style-type: none"> <li>• Missing ferry lashings on a lorry going to Stornoway, impacted delivery, leaving field staff with less time to organise the boxes for distribution at training.</li> </ul>	<p><b>a) Carry on with the same solution for 2011.</b></p> <p><b>b) Review the packaging to try and reduce the space required to store returned materials e.g. give each enumerator a sack along with their other field materials.</b></p> <ul style="list-style-type: none"> <li>• This was an issue for 2009 rehearsal only, as delivery was made using different vehicle type to that which will be used for 2011.</li> </ul>	<p>July 11/ Aug 11 onwards</p>

Description	Success Criteria	Outcome	Recommendation	Timeframe
		<ul style="list-style-type: none"> <li>• Collection of surplus materials - Severe weather conditions in Stornoway, scheduled ferry times were brought forward leaving less time for the collection of materials.</li> </ul>	<ul style="list-style-type: none"> <li>• Review Business Continuity and Disaster Recovery (BCDR) plans with logistics provider.</li> </ul>	
<p><b>9) Logistics/Data Capture Interface</b></p>	<p><b>a) Did Paper Data Capture &amp; Coding (PDCC) service provider receive correct inbound boxes in correct manner?</b></p>	<p>Partly Achieved:</p> <ul style="list-style-type: none"> <li>• Feedback has been positive with regards to census materials.</li> <li>• Misuse of the manifest and retention of unnecessary paper work. PDCC photocopying the signed logistics provider manifest at time of delivery.</li> <li>• Inbound box weight restrictions set by PDCC - CHQ having to provide spare logistics provider/census box labels.</li> </ul>	<ul style="list-style-type: none"> <li>• Retain similar methods with minor amendments and enhancements.</li> <li>• PDCC only sign the podium and use the logistics provider's online tracking system for their audit requirements.</li> <li>• Field staff scan a copy of the signed manifest and email to PDCC along with the consignment file.</li> <li>• Confirm legal weight and agree with all providers what restrictions apply. Handle on the boxes for 2011 to be used as a</li> </ul>	<p>April 2011 onwards</p> <p>July 2010</p>

Description	Success Criteria	Outcome	Recommendation	Timeframe
	<p><b>b) Did barcoding system work?</b></p>	<p><b>b) Barcoding system worked well.</b></p>	<p>measure for field staff, to pack a box within the agreed weight restriction. Update the return and collection instructions to inform field staff to enclose each Enumeration District (ED)batch of surplus census labels with the appropriate ED questionnaires so that PDCC have spare live batch numbers.</p> <p><b>b) Retain same system for 2011.</b></p>	

### 3. Other evaluation points

#### Field Supplies

Description	Outcome/Issues	Recommendation	Timeframe
<b>10)</b> Logo	Delay in getting rehearsal logo signed off meant that we were unable to purchase and provide actual field staff products on time i.e. ID cards, business cards, bags, parcel tape etc.	Logo design needs to be designed earlier ensuring that products using the logo are known to the Publicity team along with the required by date.	Early 2010
<b>11)</b> Business cards	<p><b>a)</b> Unable to get business cards produced with field staff details until broadband was installed, this delayed their issue to field staff.</p> <p><b>b)</b> Logo &amp; strap-line (blue on white), printing uses a lot of colour/toner. National Archives of Scotland (NAS) produced the business cards free of charge for General Registers Office for Scotland (GROS), however due to quantities required for 2011 Census this will have huge cost implications for NAS with regards to resource (staff/toner). NAS will consider charging for future requests (approx £10 per 50).</p>	<p><b>a)</b> Accounts to be set up in plenty of time, whether broadband or mobile broadband via 3G.</p> <p><b>b)</b> Discuss requirements with NAS and come to some agreement regarding cost etc. or FOB could print business cards in-house.</p>	<p>June/July 2010</p> <p>October 2009 onwards</p>
<b>12)</b> Identification (ID) cards	<b>a)</b> The credit card style counterfoils did not merit production. Limited space to provide or capture information and the writing panels were unsuitable for using a standard biro pen. A Microsoft Word document receipt would	<b>a)</b> Use similar procedures as Scottish Government (SG) for receipt of ID cards or explore other possible solutions e.g. field services system.	September 2009 onwards

Description	Outcome/Issues	Recommendation	Timeframe
	<p>have sufficed.</p> <p><b>b)</b> Had to hand-write the ID number on actual ID cards as these numbers were pre-printed on the counterfoils only.</p> <p><b>c)</b> Standard of field staff photos – some were of a poor quality. Public perception - lack of official trust.</p>	<p><b>b)</b> Be more precise to contractor regarding requirements, also consider incorporating the field staff census ID. Reconsider the issuing methods and procedures for 2011.</p> <p><b>c)</b> Recruitment material needs to be more specific with regards to expected quality e.g. passport requirements.</p>	<p>September 2009 onwards</p> <p>May 2010 onwards</p>
<p><b>13)</b> Other field materials supplier</p>	<p><b>a)</b> All collections from supplier by logistics service provider (LSP) were requested by Census Headquarters (CHQ) using the LSP online system. Manageable for the logistics team for 2009 but will be time consuming for logistics team/CCS in 2011.</p> <p><b>b)</b> The boxes used to supply materials did not appear robust enough.</p> <p><b>c)</b> CHQ didn't have suitable packaging for sending out materials to the field i.e. census bag doesn't fit into a census box. Logistics team had to source suitable packaging from other teams within GROS for this purpose.</p>	<p><b>a)</b> 2011 materials supplier to be given access/training to use LSP online system.</p> <p><b>b)</b> Specific minimum strength of packaging required in the Statement of Requirement (SoR). Logistics provider will use dedicated vehicles for 2011, so this should reduce the risk of damage.</p> <p><b>c)</b> Add CHQ packaging requirements to SoR.</p>	<p>March 2010 onwards</p> <p>September 2009 onwards</p> <p>September 2009</p>

Description	Outcome/Issues	Recommendation	Timeframe
<b>14)</b> CTL Materials	A decision was made not to produce pre-printed CTL diaries, however feedback from CTLs was that diaries would be useful so FOB had to buy standard diaries.	Standard diaries to be issued to CTLs.	w/c 10 January 2011
<b>15)</b> Printer consumables	Printer consumables (toners) were not included in the product list when tendering for contract, leaving the field office with no spares. This was brought to our attention when a CCS field member purchased an additional toner for their remote office printer.	Use CHQ office consumables as a back up for field offices.	July 2010 onwards
<b>16)</b> Stock control	<p><b>a)</b> Due to lack of Information Technology (IT) and FOB resource, designing and implementing was delayed, resulting in unknown stock levels in the field.</p> <p><b>b)</b> The stock control system was user friendly and well received by the field. CHQ were able to monitor overall stock levels easily.</p> <p><b>c)</b> Unable to print a full report of "Log stock used", it only prints a screens worth. Time consuming for logistics team having to scroll to view and note information.</p>	<p><b>a)</b> Dependant on future of FMIS. Continue with the same solution for 2011 with some amendments and enhancements.</p> <p><b>b)</b> Retain for 2011.</p> <p><b>c)</b> A print friendly version icon and or a user friendly option to extract info into Microsoft Excel - part of 2011 enhancements.</p>	September 2009 onwards for a, b and c

Description	Outcome/Issues	Recommendation	Timeframe
<p><b>17) Print Products and Services</b></p>	<p><b>a)</b> Picking &amp; Packing - Counting bundles of 100s from 1000s, slowed up the operation.</p> <p><b>b)</b> Communal Establishment (CE) envelopes were too large to fit into the census bag. Envelopes were visible when being carried, not secure or weatherproofed.</p> <p><b>c)</b> No privacy envelope for individual questionnaires - see Standard Enumeration evaluation for further details.</p> <p><b>d)</b> Placeholder forms – The method of banding used wasn't suitable for distributing to enumerators. Bundles were unprotected from damage.</p> <p><b>e)</b> Reply envelopes, CHQ (helpline) unable to post-out questionnaires with any reply envelope after enumerators contract/field operation ended. Additional work for logistics team.</p> <p><b>f)</b> Post-out envelopes, no outbound envelope for post-out enumerators, resulting in CHQ staff/field staff purchasing stamps and last minute A5 envelopes for reminder cards.</p>	<p><b>a)</b> Request and agree banding requirements with printer, especially for reminder cards.</p> <p><b>b)</b> Source bigger bag for CTLs.</p> <p><b>c)</b> Privacy envelopes to be provided.</p> <p><b>d)</b> To agree packaging requirements for 2011 with printer i.e. shrink-wrap, paper wrap like reams of paper etc.</p> <p><b>e)</b> Need to review the fulfilment procedures, for after the enumerators finish and the end of the field operation. CHQ either need to have a supply of 22 FO reply envelopes or their own CHQ reply envelope.</p> <p><b>f)</b> Add to the print product list for 2011.</p>	<p>October 2009 onwards</p> <p>September 2009 onwards</p> <p>As per Enumeration</p> <p>July 2009</p> <p>September 2009 onwards</p> <p>October 2009</p>

Description	Outcome/Issues	Recommendation	Timeframe
<b>18) Field Staff</b>	<p><b>a)</b> CE enumerators not included in supply requirement. Logistics team had to make up last minute boxes using CHQ stock.</p> <p><b>b)</b> CE Enumerators not specific to Census District (CD). Effects print packaging/palletising, training/delivery dates.</p>	CTLs will now enumerate CE's.	September 2009 onwards
<b>19) Mobile Phones</b>	Ordering of phones was carried out on a field grade basis and did not include CE enumerators. It was time consuming to source additional phones as insufficient spares available.	<p>CTLs will now enumerate communal establishments.</p> <p>The provision of mobile phones will be managed by the mobile communications provider.</p>	October 2009 onwards

### Logistics (SaSCinS)

Description	Outcome/issue	Recommendation	Timeframe
<b>20) Logistics Contract</b>	<p><b>a)</b> Delay in signing the contract resulted in the lack of processes &amp; procedures at the outset. This limited the time available to agree processes and procedures before 'go live'.</p> <p><b>b)</b> Lack of picking and packing specification, unpersonalised printed materials not being picked and packed to GROS requirements. Unaddressed materials delivered to Station Road site, FOB pick &amp; pack before onward transmission to the field.</p>	<p><b>a)</b> Work with logistics contractor to define the processes and procedures in advance of 2011 'go live'.</p> <p><b>b)</b> In-house picking and packing operation for 2011.</p>	<p>September 2009 onwards</p> <p>September 2010 (with planning Sept 09 onwards)</p>



Description	Outcome/issue	Recommendation	Timeframe
	<p><b>c)</b> Delay in signing off delivery schedule/rehearsal solution.</p>	<p><b>c)</b> As with recommendation a) above.</p>	
<p><b>21)</b> Thermal printer</p>	<p>When validating the thermal printer, our SG Information Communications technology (ICT) colleagues experienced some difficulties when contacting the thermal printer helpdesk, as they didn't have the relevant logistics contract/account details. This delayed the validation process and both the logistics team and logistics contractor had to intervene.</p>	<p>Agree a smoother process for indirect customers (field managers) contacting contractors helpdesks.</p>	<p>September 2009 onwards</p>
<p><b>22)</b> CHQ spare stock</p>	<p><b>a)</b> Lack of easily accessible secure storage area dedicated to the logistics team/census.</p> <p><b>b)</b> Store on ground floor of GROS is a shared resource and does not meet security requirements.</p> <p><b>c)</b> Station Road used to store bulk spare supplies. Time consuming for logistics team to visit for stock.</p>	<p><b>a)</b> Need to be able to have a supply of stock securely stored at CHQ as well as bulk being stored at Station Road site.</p> <p><b>b)</b> Preferably on ground level for delivery logistics, this could also be used for the storage of direct returns (late returns).</p> <p><b>c)</b> Secure accommodation needs to be found in CHQ or full-time use of a van to pick up supplies from Station Road.</p>	<p>Early 2010 onwards</p>