

Truck and taxi survey. no. 3 May 1964

[s.l.]: Southeastern Wisconsin Regional Planning Commission, May 1964

<https://digital.library.wisc.edu/1711.dl/OROQE5TU4RMRM8B>

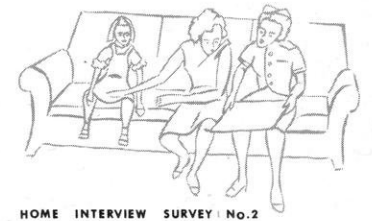
<http://rightsstatements.org/vocab/InC/1.0/>

The libraries provide public access to a wide range of material, including online exhibits, digitized collections, archival finding aids, our catalog, online articles, and a growing range of materials in many media.

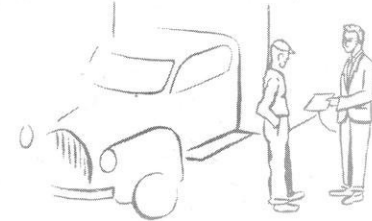
When possible, we provide rights information in catalog records, finding aids, and other metadata that accompanies collections or items. However, it is always the user's obligation to evaluate copyright and rights issues in light of their own use.



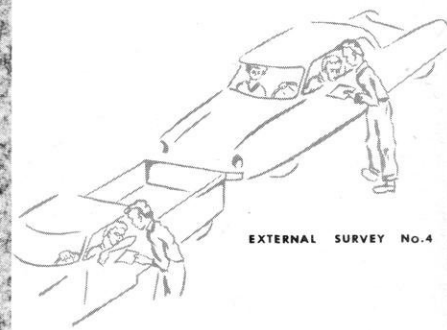
ORGANIZATION CHARTS AND
POSITION DESCRIPTIONS No. 1



HOME INTERVIEW SURVEY No. 2

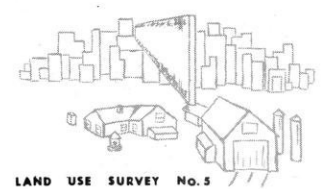


TRUCK AND TAXI SURVEY No. 3

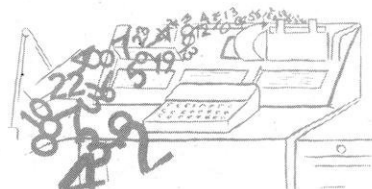


EXTERNAL SURVEY No. 4

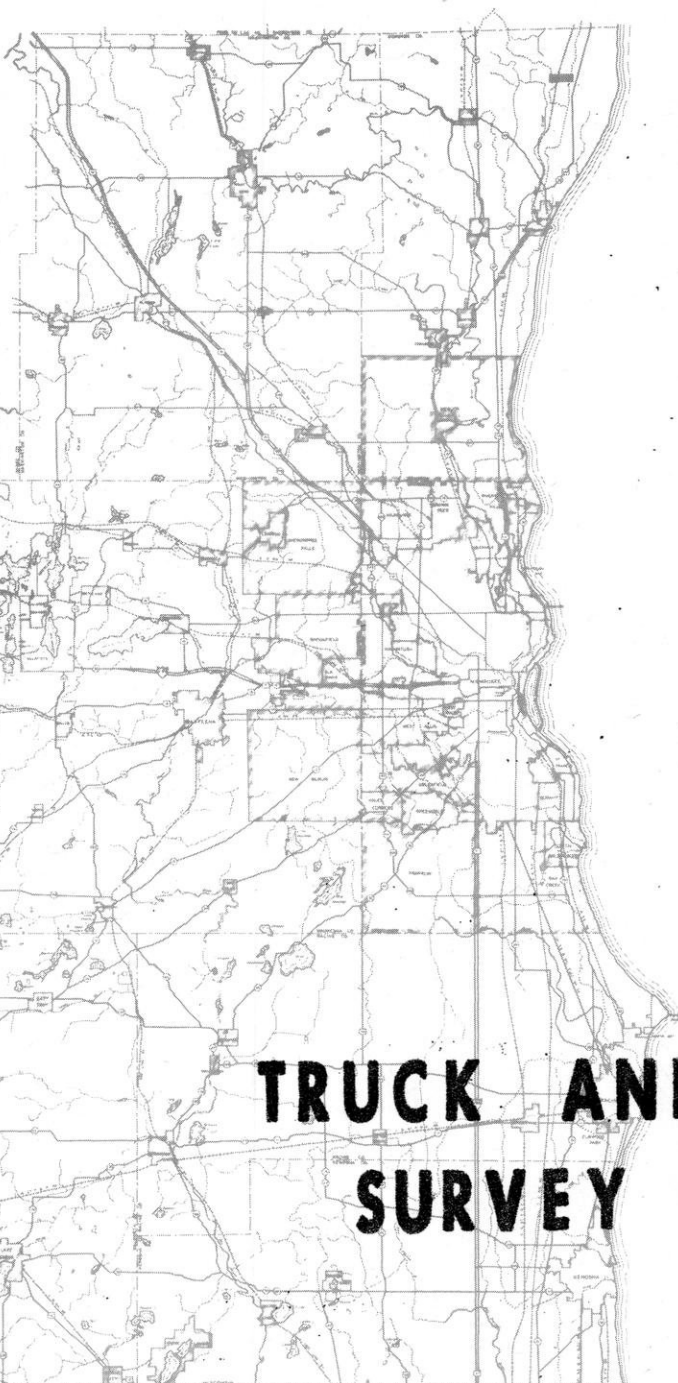
W REGIONAL
PLANNING



LAND USE SURVEY No. 5



CODING No. 6



TRUCK AND TAXI SURVEY No. 3

0761

RESEARCH CENTER

Department of Urban and Regional Planning
University of Wisconsin
Madison, Wisconsin

REGIONAL LAND USE - TRANSPORTATION STUDY

Procedural manuals No 3 -

1964 -

COMMISSION MEMBERS

KENOSHA COUNTY

George C. Berteau, Chairman - Kenosha
Erwin W. Lange - Kenosha
George L. Schlitz - Burlington

MILWAUKEE COUNTY

Richard W. Cutler, Secretary - Milwaukee
John P. Murphy - West Allis
Prof. Henry J. Schmandt - Milwaukee

OZAUKEE COUNTY

Ray F. Blank - Crafton
Nick R. Didier - Port Washington
James F. Egan - Mequon

RACINE COUNTY

Lester Hoganson - Burlington
Milton F. LaPour - Racine
Wilfred Patrick - Racine

WALWORTH COUNTY

Charles B. Coe - Whitewater
Eugene Hollister - Williams Bay
John D. Voss - Elkhorn

WASHINGTON COUNTY

Dr. Carlton M. Herman - Allenton
Joseph Schmitz, Vice Chairman - Germantown
Arthur Weiner - West Bend

WAUKESHA COUNTY

Lyle L. Link, Treasurer - Waukesha
Maynard W. Meyer - Pewaukee
Mervin L. Brandt - Pewaukee

The preparation of this manual was financed in part through a joint planning grant from the State Highway Commission of Wisconsin, the U. S. Department of Commerce, Bureau of Public Roads, and the Housing and Home Finance Agency, under the provisions of the Federal Aid Highway Legislation, and Section 701 of the Housing Act of 1954, as amended.

PROCEDURAL MANUAL

NUMBER 3

TRUCK AND TAXI SURVEY

Land Use - Transportation Study

Revised May 1964

Southeastern Wisconsin Regional Planning Commission
916 No. East Avenue - Waukesha, Wisconsin - 53187

TABLE OF CONTENTS

	Page
DEFINITIONS	i
Part I <u>Introduction</u>	1
Part II <u>Survey Organization</u>	3
Division of Truck-Taxi Responsibility	3
Figure 1	5
Part III <u>Position Requirements</u>	7
Your Job.	7
Part IV <u>Interview Procedures</u>	11
The Daily Assignment.	11
Preinterview Technique.	11
Preinterview Contact.	11
The Interview	12
Part V <u>Forms You Will Use</u>	13
The Truck-Taxi Interview Forms.	13
The Truck-Taxi Summary Forms	26
The Administrative and Expense Forms.	27
Part VI <u>Administrative Procedures - District Office</u>	29
Time and Attendance Reporting	30
Performance Rating Report	33
Communication with Interviewers	33
Part VII <u>Work Control and Reports in District Office</u>	35
General Instructions for Control of Schedules	35
Instructions for Completing Reports and Control Forms	36
Part VIII <u>Editing</u>	43
Objectives of the Editing Process	43
Importance of Good Editing.	45

Part IX	<u>Training</u>	45
---------	---------------------------	----

	General	47
--	-------------------	----

	Training Schedule	47
--	-----------------------------	----

Appendix

A. Forms

.....

.....

.....

DEFINITIONS

- ORIGIN-DESTINATION SURVEY - A survey that inventories the amount and kinds of travel in an area. Such information as the locations where trips begin and end, the mode of transportation used, and the purposes of the trips, and other related information, are obtained in a survey of this type.
- TRUCK-TAXI SURVEY - That phase of the Origin-Destination Survey in which travel data of trucks and taxis in the sample area are obtained.
- SAMPLE AREAS - Those portions of the Region in which a sampling of truck and taxi owners are assigned for interview. These are shown on Map 1.
- THE SAMPLE NUMBER - A six digit number assigned to each schedule to provide a unique identification reference. The first two digits represent the week and the day for which travel data are collected; the third and fourth digits indicate the interviewer list number as shown on the assignment list; and the fifth and sixth numbers represent the address of the respondent as shown on the assignment list of addresses. Thus, sample number 320106 would be for the third week of interviewing, the second day of the week, interviewer list number "01" and line number "06" on his assignment list of addresses.
- LIST OF ADDRESSES - The daily assignment or workload of an interviewer. The normal number of addresses on the daily assignment is ten.
- THE PREINTERVIEW DATE - The initial contact with the respondent on the last work day before the travel date in order to deliver the trip logs and to give instructions for their use and to explain briefly the objectives of the survey.
- TRAVEL DATE - The day and date for which all travel information for a given vehicle is obtained. This is not to be confused with the date of the interview.
- THE INTERVIEW DATE - The day on which the interviewer returns to collect the trip logs and to complete the interview. This should be on the first work date following the travel date, if possible.
- A COMPLETED INTERVIEW - An interview in which all necessary information has been obtained.
- A NONINTERVIEW - An assignment in which all necessary information cannot be obtained for the vehicle sampled. Types of noninterviews are shown at the bottom of the List of Addresses, Form T5-91.
- THE GARAGING ADDRESS - The detailed description of the location where the vehicle is normally kept overnight or when it is not in use.
- QUALITY CONTROL - A program for checking the interviewer's ability to obtain and record accurate and complete information. This program is conducted throughout the progress of the survey.
- A TRIP - The one way travel by a single mode of transportation for a distance of at least two blocks between the point of origin and the point of destination.
- A SCHEDULE - Another name for the Truck-Taxi Report, Form T5-92.

1.

Part I

INTRODUCTION

The truck-taxi survey is one of four major travel inventories to be conducted in the Southeastern Wisconsin Regional Planning Commission land use-transportation study. A cross section or sample of truck and taxi owners in the principal metropolitan areas will be interviewed in this survey to obtain travel data necessary to the planning process.

Other surveys will obtain the travel of trucks and taxis garaged outside of the highly developed areas around Milwaukee, Racine and Kenosha; the household characteristics and travel data for all residents of the Region, and travel data of persons and vehicles entering or leaving the Region. The composite of these inventories will represent all travel of persons and vehicles within the Region on an average weekday.

In the truck-taxi survey, one in twelve vehicles in the Milwaukee interview area will be selected for sampling. The Milwaukee area includes all of Milwaukee County, the eastern one third (approximately) of Waukesha County, and southern portions of Washington and Ozaukee Counties. In both Racine and Kenosha interview areas the sample rate will be one in four. These areas include, in each instance, the principal city and its immediate environs. These interview areas are shown on Map I. These sample rates will require altogether approximately 4,250 personal interviews, representative of nearly 39,000 vehicles.

Information to be obtained for each sampled vehicle will include the registration and garaging addresses, the vehicle type and the business and industry of the owner. Additionally; travel information for each sampled vehicle will include the number of trips made on a specified travel date, the location and the land uses of each trip origin and destination, the trip purposes, start and arrival times and the principal commodity carried.

It is vital that all information obtained be wholly accurate and complete. Since each interview will represent the travel habits of others, a single error would actually amount to several errors. If just one error was made in each interview, the expanded information would contain nearly 40,000 errors.

1. The first of these is the fact that the
the government has been unable to
the people of the country.

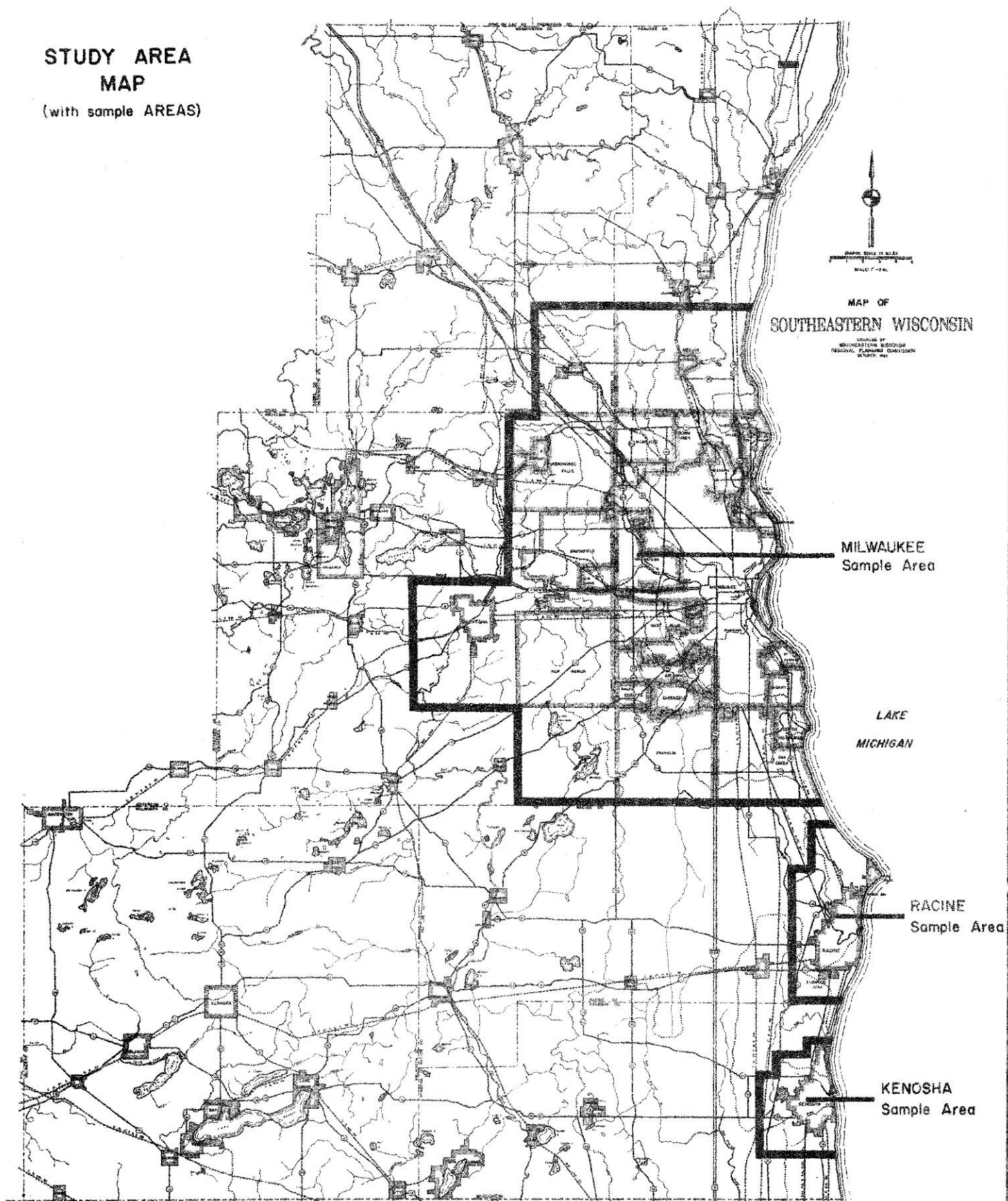
2. The second is the fact that the
the government has been unable to
the people of the country.

3. The third is the fact that the
the government has been unable to
the people of the country.

4. The fourth is the fact that the
the government has been unable to
the people of the country.

5. The fifth is the fact that the
the government has been unable to
the people of the country.

**STUDY AREA
MAP**
(with sample AREAS)





Part II

SURVEY ORGANIZATION

DIVISION OF TRUCK-TAXI SURVEY RESPONSIBILITY

Figure I shows a block diagram of the field organization of the truck-taxi survey. The study director has the responsibility of delineating the general boundaries of the personal interview survey area, establishing the sample size, determining the kinds of data to be collected and advising the internal survey supervisor on the conduct of operations of the survey.

The internal supervisor will define the exact boundaries of the personal interview survey areas, supervise the sample selection, prepare procedural manuals, design interview forms, recruit interview personnel, prepare training programs and oversee the conduct of operations.

The truck-taxi supervisor will assist in the sample selection, locate and establish district field offices, train field supervisors and assist in training interviewers and editors, design office report forms and supervise the conduct of the survey. The primary duty of the district chief is the supervision of data collection. He will maintain continued checks of interviewers' work to insure high quality; he will supervise the editing program and direct remedied action to correct deficiencies found. The district chief will prepare administrative reports on the progress of operations.

The lead interviewers will work closely with interviewers giving retraining where necessary. They will make quality checks of interviewers' coverage of assignments by rechecking the information obtained at interview addresses. Lead interviewers will substitute for interviewers when necessary. They will attempt to solve the problems of refusals and other noninterview cases.

The editors will assume the responsible clerical work involving detailed and critical review of the schedules completed by interviewers. They will note all omissions, inaccuracies and inconsistencies, and refer deficient schedules to lead interviewers for corrective action or additional information. Editors will prepare and maintain time and attendance records for their districts and will prepare progress reports, memoranda and quality control charts. A thorough knowledge of the data to be collected is required to satisfactorily accomplish the requirements of the position.

The work of the interviewers consist of collecting data through interviewing at predesignated sample addresses and obtaining travel information and vehicle data. Interviewers must be adept in recording information accurately and completely on the work sheets provided. They will prepare and submit daily reports of work progress and travel expenses.

The operations of the truck-taxi survey will be conducted from two field offices. One district office will be centrally located in the Milwaukee interview area, and the other will be located between the Kenosha and Racine interview areas and will serve both areas.

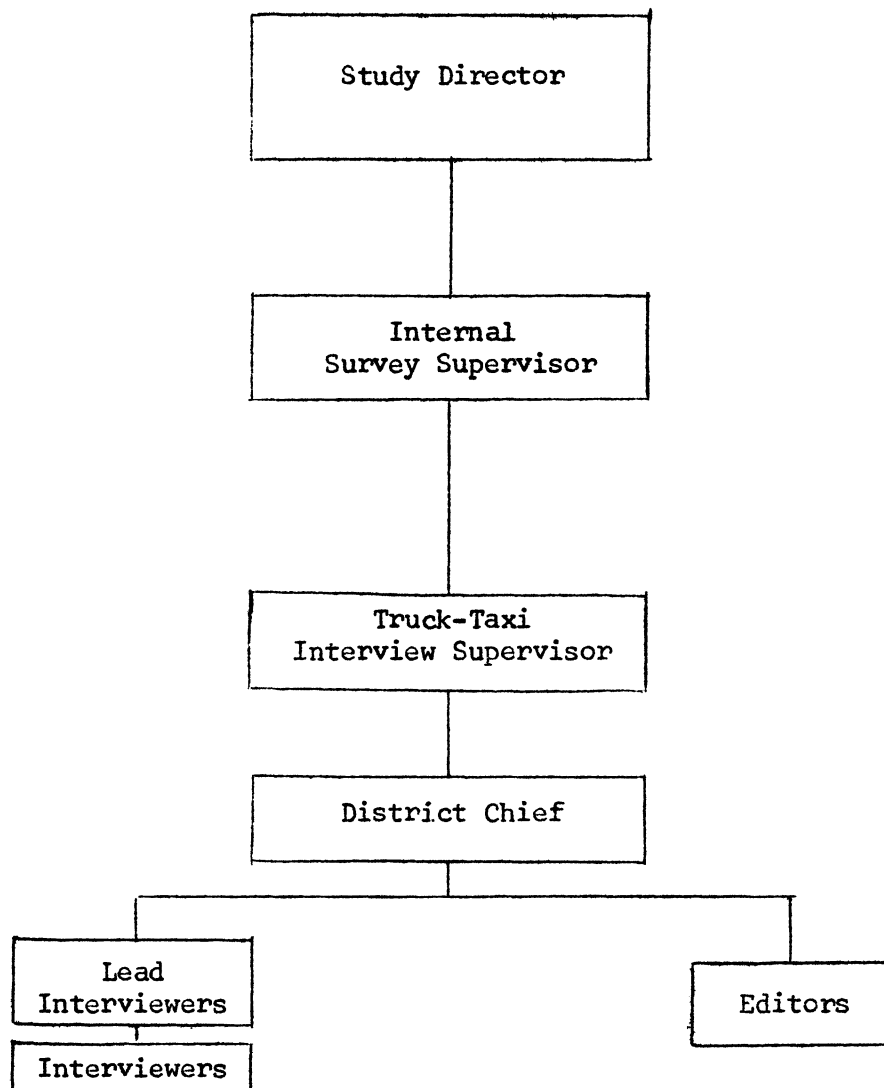
4.

One district chief will supervise both districts. Lead interviewers, editors and interviewers will be assigned to each district in proportion to the number of schedules assigned to the district.

Figure 1

Field Organization

Southeastern Wisconsin Regional
Land Use-Transportation Study



Part III

POSITION REQUIREMENTS

YOUR JOB

General

You have already received notice of appointment as an interviewer on the truck-taxi survey. Included in this notice was your title, rate of compensation and starting date of employment.

As an interviewer you have a vital task to perform for the southeastern Wisconsin regional land use-transportation study and thus, for the Southeastern Wisconsin Regional Planning Commission and for the federal, state, county and local governments who sponsor and pay for the Study. It will be your responsibility to call in person at designated addresses and to obtain by interview detailed information concerning trucks and taxis, including the trips these vehicles make. The trip information will be obtained for each vehicle for a specified date, referred to as the "travel date".

In addition to the basic interviewing duties you will be expected to:

- a. Be available for day and evening work as required.
- b. Read and become thoroughly familiar with the contents of this manual and other instructional material as assigned.
- c. Complete your assignments within the prescribed period of time.
- d. Deliver the completed work to the field office each day.
- e. Keep an accurate daily record of the work you do, the time you spend, and the travel and other costs incurred in doing your work.
- f. Perform your work in an efficient manner and develop a high degree of accuracy and thoroughness.

Performance Standards

The success of this transportation Study depends, to a very large measure, on the work of each interviewer. Unless you obtain and record accurate and complete information, no amount of review or correction in the field office or in the central office at Waukesha can substantially improve the reliability of the results.

Your work will be reviewed in the field office in addition to quality checks, which will help insure that high quality information has been obtained and that complete coverage of all establishments included in the sample has been accomplished.

8.

Training

Prior to the beginning of formal interviewing, a special training session will be conducted by the supervisory personnel in the field offices. You will be required to attend this training session which will last five days. The session will consist of lectures and practical exercises designed to acquaint you with the interviewing procedure and the contents of this manual. Continuation of employment is contingent upon the successful completion of this training session.

Hours of Work

You will work five days a week, Monday through Friday. The work day shall consist of those eight hours between 8:00 a.m. and 8:00 p.m. that will best serve to complete the required interviews.

Supplies

You will be supplied with a portfolio containing the forms and other supplies necessary for your work. The portfolio is to be used in your daily work. Carry in it only the blank forms required for the given day's work.

Keep the other forms in a safe place where they will not be accessible to unauthorized persons. When additional copies of any form are needed, obtain them from your supervisor.

Upon your termination you are obligated to return all materials issued to you. This will include, among other things, portfolios, all forms, and your identification card.

Selling or Soliciting Not Permitted

You are not allowed to combine with your work as interviewer any other occupation, such as collecting information for directory publishers, soliciting subscriptions to newspapers and magazines, or selling and advertising any article.

Improper Activities

During the course of your interview with respondents, you are not allowed to engage in any activity or discussion which is not directly related to the work of obtaining the information required in the interview. You may not, for example, leave any cards or other literature or discuss any matter relating to non-survey activities such as charitable work, "special causes" of any kind, or political candidacy for public office.

Information Is Confidential

All information collected by interview is strictly confidential. Individual reports will be used for statistical purposes only. These reports can be handled only by authorized personnel of the participating agencies and all copies and extracts of copies of completed interviews will be forwarded to the district office. Only statistical summaries are published; individual interviews will not be used by anyone for purposes of administration or regulation of any program.

Payroll and Expense Vouchers

As a temporary employee you are paid twice a month and at an hourly rate, with deductions made for withholding taxes.

Twice a month, subject to your supervisor's approval, you are repaid for the outlay of expense money listed on your expense record for this period. Vehicle expense is reimbursed at the rate of seven cents per mile.

Identification Cards

Identification cards will be prepared and issued by the personnel division. They must be properly signed and are to be used exclusively for official business related to your job. Improper usage constitutes grounds for dismissal. A firm control must be placed on identification cards at all times. Upon completion of tour of duty with the Commission, the identification card must be turned in. This is done before the employee receives his final check. In case an identification card is lost, destroyed or mutilated, the employee must sign a statement to that effect, including the date lost, and the circumstances surrounding the loss, destruction or mutilation of the card.

CONTACTS WITH YOUR SUPERVISOR

During the Interviewing Period

During the first few days of interviewing you will be visited personally by your supervisor while you are at work. During this visit, you will have an opportunity to discuss any problems that have arisen in connection with your work. Thereafter, you will be visited by your supervisor at longer intervals, depending to a large extent upon the quality of your work.

Daily Contact with Supervisor

You will report to your supervisor each day at the district office. This will keep him informed at all times of your progress and provide some time to discuss any problems which you may have and to review your interviewing procedures.

Other Contacts

Inform your supervisor promptly of any unusual problems or situations that arise with which you need help or advice. If you are unable to contact him immediately, make a written note of the problem or situation and telephone him at the first opportunity.

Errors and Corrections

Your supervisor will inform you of errors and omissions detected in the course of reviewing your work. He will advise you on necessary steps to take to avoid future mistakes. Serious and frequent errors can be eliminated if you become thoroughly familiar with your manual. Learn to use it and carry it with you on the job. Respect the advice or corrections which your supervisor will make. His only purpose in making suggestions or comments is to insure that the quality of your work will be high.

1. The first part of the document is a letter from the President of the United States to the Congress, dated January 3, 1862. It is a very important document, as it contains the President's annual message to Congress, which is a key event in the American political calendar.

2. The second part of the document is a report from the Secretary of the Interior, dated January 10, 1862. It contains information about the state of the Department of the Interior, including the status of the various bureaus and the progress of the work of the Department.

3. The third part of the document is a report from the Secretary of the Treasury, dated January 15, 1862. It contains information about the state of the Department of the Treasury, including the status of the various bureaus and the progress of the work of the Department.

4. The fourth part of the document is a report from the Secretary of the War, dated January 20, 1862. It contains information about the state of the Department of the War, including the status of the various bureaus and the progress of the work of the Department.

5. The fifth part of the document is a report from the Secretary of the Navy, dated January 25, 1862. It contains information about the state of the Department of the Navy, including the status of the various bureaus and the progress of the work of the Department.

6. The sixth part of the document is a report from the Secretary of the State, dated February 1, 1862. It contains information about the state of the Department of the State, including the status of the various bureaus and the progress of the work of the Department.

7. The seventh part of the document is a report from the Secretary of the War, dated February 5, 1862. It contains information about the state of the Department of the War, including the status of the various bureaus and the progress of the work of the Department.

8. The eighth part of the document is a report from the Secretary of the Navy, dated February 10, 1862. It contains information about the state of the Department of the Navy, including the status of the various bureaus and the progress of the work of the Department.

9. The ninth part of the document is a report from the Secretary of the State, dated February 15, 1862. It contains information about the state of the Department of the State, including the status of the various bureaus and the progress of the work of the Department.

10. The tenth part of the document is a report from the Secretary of the War, dated February 20, 1862. It contains information about the state of the Department of the War, including the status of the various bureaus and the progress of the work of the Department.

11. The eleventh part of the document is a report from the Secretary of the Navy, dated February 25, 1862. It contains information about the state of the Department of the Navy, including the status of the various bureaus and the progress of the work of the Department.

12. The twelfth part of the document is a report from the Secretary of the State, dated March 1, 1862. It contains information about the state of the Department of the State, including the status of the various bureaus and the progress of the work of the Department.

13. The thirteenth part of the document is a report from the Secretary of the War, dated March 5, 1862. It contains information about the state of the Department of the War, including the status of the various bureaus and the progress of the work of the Department.

Part IV

INTERVIEW PROCEDURES

THE DAILY ASSIGNMENT

For each work day, you will be assigned a list of ten addresses containing the names and addresses of owners of vehicles for which information is required. These vehicles will be identified on this list by license number and by vehicle type. A travel date will appear at the top of the list of addresses form. This is the date for which trip information of the sampled vehicles is required. It is not the date of interview.

PREINTERVIEW TECHNIQUE

An Advance Letter of Explanation

About one week before the predesignated travel date, a form letter will be mailed from the central office to each owner of a vehicle that has been selected as a sample.

This letter introduces the Commission and explains briefly the purposes of the transportation study and of the truck-taxi survey. It describes the information that is desired and requests the cooperation of the owner. The predesignated travel date and the license number of the vehicle for which travel information is required is also listed in this letter. The owner is informed that an interviewer will call within the next few days.

PREINTERVIEW CONTACT

On the work day immediately preceding the scheduled travel date, you will call at each of the ten addresses on your assignment and leave a sufficient number of trip logs to cover all of the trips of the vehicles involved. It is important in each contact to locate the person who is best qualified to act as the respondent and to deal with him directly from the start, if possible. Otherwise, you will arrange to have trip logs relayed to the proper respondent by a reliable person in the firm. At least, two attempts should be made to personally contact this respondent before leaving the forms with an intermediary.

When making contact with the respondent, refer immediately to the letter of explanation. If he has not seen the letter, give him a copy to read. You will explain the correct procedure for completing the trip logs and request that the driver of the vehicle be instructed to take the trip logs with him and record the information for each trip as it is completed.

You should take advantage of the opportunity afforded by this contact to arrange with the respondent a mutually convenient time for your return to collect the trip logs and to complete the interview. This appointment should be set for the first work day following the travel date, if possible, and no later than the third work day following the travel date.

THE INTERVIEW

General

Returning at the appointed time, you will collect the trip logs and review them with the respondent for completeness and accuracy. If there are omissions, inaccuracies or inconsistencies in the data, or if the trip logs have not been filled out and the respondent is not able to provide complete and accurate information, arrange an appointment with the person who can provide the data. The latter will be usually a dispatcher or a driver.

Daily Workload

On a given work day you are required to call at each of the ten addresses scheduled for preinterview contact, and also to complete an average of ten interviews. This does not necessarily represent twenty calls per day, since very often one or more vehicle owners will have more than one vehicle listed for sampling on a given date. In arranging the assignments, multiple samples operated by a single establishment will be scheduled for interview on one day, if possible; otherwise, on successive days. This procedure minimizes time and travel costs and reduces the number of calls necessary to complete the daily assignments. In some cases, all ten assignments on a given day may be scheduled for the same establishment.

Self Conduct

The quality of the interview is often determined by the manner of the interviewer. You must remember that truck and taxi owners and operators are busy people. When contacting the respondents either in the preinterview stage or when completing the interview, get right to the point. Be friendly but be business-like, combining these traits so as to obtain maximum cooperation.

A key to good interviewing is to make the respondent feel that he has a part in the undertaking. Let the respondent know the importance of the required information and that by providing accurate data, he is doing a service to his community and to the entire Region. Answer any questions he may have as fully as you can, and if his questions are beyond your experience or knowledge of the study, inform him that you will obtain the answers and relay them to him. At the close of the interview express your appreciation for all individual help rendered.

Part V

FORMS YOU WILL USE

The transfer of statistical data and related information is executed through the use of appropriately designed forms. The forms used in this survey can be divided into three groups. These groups are:

1. The truck-taxi interview forms
2. The truck-taxi summary forms
3. The administrative and expense forms

THE TRUCK-TAXI INTERVIEW FORMS

The forms listed in this group are as follows:

1. "Advance Letters of Explanation" Form T5-90
2. "List of Addresses" Form T5-91
3. "Truck and Taxi Trip Log" Form T5-93
4. "Truck and Taxi Report" Form T5-92
5. "Daily Report" Form T5-94

Advance Letter of Explanation, Form T5-90

The purpose and use of this letter has been described in Part IV. Copies of this letter should be carried in your portfolio at all times so that you may give a copy to any respondent who, for some reason, failed to receive one.

List of Addresses, Form T5-91

The "List of Addresses", Form T5-91, is the daily work assignment containing the name and addresses of vehicle owners who have been scheduled for interview. This form will be issued to you by your district office about three work days before the travel date. You will obtain trip information for the vehicles identified on this list for the travel date shown. No substituting of vehicles or changing of travel dates will be permitted.

The form will be made out in triplicate. The name of the owner, address, vehicle type and the license number of each listed vehicle will be entered by the central office on all copies. You will use the white copy, Form T5-91. The second copy (pink), Form T5-91A, will be retained in the district office and the third copy (yellow), Form T5-91B, will be retained in the central office.

0762 0761

RESEARCH CENTER

Department of Urban and Regional Planning
University of Wisconsin
Madison, Wisconsin

You will keep your copy of this form until information on all vehicles has been obtained. When interviews for all vehicles listed have been completed, this form will be returned to the district offices. Form T5-91 must be returned to the district offices within three work days after the travel date. If, after three work days following the travel date, interviews for some of the vehicles listed have not been completed, you must still turn in this form along with all incomplete interview schedules and trip logs.

The following are specific instructions for completing Form T5-91:

1. "Travel Date" - The travel day and date will be entered by the central office.
2. "Interviewer" - The name of the interviewer to whom this assignment is to be given will be entered by the district office.
3. "List Number" - The list number, which is the section of the district in which these addresses may be found, will be entered by the central office.
4. "List of Trucks or Taxis" - One of these boxes, or both, will be checked by the district office.
5. "Sample Number" - The central office will assign the sample number for each "List of Addresses". The sample number on this form is a four-digit code for travel date and the list number. The first digit represents the week of interview; the second digit represents the day of the week of the travel date; the third and fourth digits represent the list number. Combined with the two-digit line number it forms the unique sample number for each interview address.

 Example: The sample number for a given address for Wednesday, May 1, is 130805. This is the first week of interviewing, the third day of the week, list number 08, and line number 05.
6. "Line Number", Item 1 - This is the line number of the sample vehicle and is printed on the form.
7. "Owner and Address", Item 2 - The name and address of the owner will be entered by the central office. In the case of leased vehicles the name of the person or company to whom the vehicle has been leased will be entered if known.
8. "Type", Item 3 - The vehicle type including the year, make and weight of the vehicle will be entered by the central office.
9. "License Number", Item 4 - The license number of the sample vehicle will be entered by the central office. This identifies the vehicle about which trip data will be obtained.
10. "Date Completed or Non-Interview Code", Item 5 - Enter the date on which the interview is completed for each completed interview. In the case of a non-interview enter the appropriate code shown at the bottom of Form T5-91.

15.

11. "Remarks", Item 6 - Enter the comments that are applicable, for example: notes concerning changes of the name or address of the owner, a different address to go to obtain the interview, or date and time of appointments.
12. "Received in Coding", Item 7 - Leave this space blank. This information will be entered in the central office.

Truck-Taxi Trip Log, Form T5-93

Form T5-93 is to be used by the operator of the sample vehicle for keeping an accurate account of all trips made on the predesignated travel day. At the preinterview (on the work day preceding the travel date) you will deliver the number of trip logs required and explain briefly the correct procedure for completing this form. If the vehicle operator is not available for the preinterview after two attempts to make contact, leave the trip logs and instructions with a responsible intermediary, who is to pass them along to the operator before the start of the travel date. The travel day for all sample vehicles is to include all trips being made between 4:00 a.m. of that date and 4:00 a.m. the following morning. The operator will be instructed to carry the logs with him throughout the travel day and record the information requested as the trips are made.

A trip as defined in this survey is the one-way travel of a vehicle between a point of origin and a point of destination. It must be at least two blocks or 0.2 miles in distance, whichever is shorter. Trips of less than two blocks (or 0.2 miles in distance) will not be recorded.

Form T5-93 is comprised of two sections. First, enter the appropriate sample number in the space provided.

Section I, Vehicle Description Data:

1. "Travel Day and Date", Item 1 - You will transcribe the travel day and date for which trip information is to be obtained, from "List of Addresses", Form T5-91. Trip data must apply to the travel date specified.
- 2 & 3. "Owner's Name and Address", Items 2 & 3 - Enter the name and address of the owner of the sample vehicle as they appear on the "List of Addresses", Form T5-91.
4. "License Number, Make and Year", Item 4 - Transcribe the license number of the sample vehicle, the make of the vehicle and year of manufacture from Form T5-91.

NOTE: The remaining items of section I are to be completed by the respondent, in accordance with instructions appearing on the back of "Truck or Taxi Trip Log", Form T5-93. You will explain these instructions, making sure the respondent understands his responsibility.

5. "Garaging Address", Item 5 - The respondent will enter the complete postal address, including zone, of the location where the vehicle is

normally kept overnight, or when it is not in use. If the garaging address is the same as the owner's, write "same" in the space.

"Municipality"---Enter the name of the city, village, or town of the garaging address even if it is the same as the owner's.

6. "Owner's Unit Number, Item 6 - If the sample vehicle is one of a fleet, the respondent will enter the unit of fleet number assigned by the owner.
7. "Reporter's Name and Telephone Number", Item 7 - The respondent will enter the name and telephone number of the person preparing this report.
8. "Vehicle Type", Item 8 - The respondent will encircle the number of the description which applies to the sampling vehicle covered by this report. Vehicle Types are illustrated in the Appendix to help the respondent correctly identify the description.
9. "Starting Address", Item 9 - The respondent will enter the street address and municipality of the start of the day's first trip. This address usually would be the same as the garaging address (if the vehicle is normally garaged at the place of business and the first trip originated here). It would be entirely different, however, if the first trip originated at some other location in or out of the region.
10. "Speedometer Reading", Item 10 - The respondent will enter the speedometer reading of the sample vehicle at the beginning and at the end of his travel day.

Section II, Trip Information - You will also ask the respondent to follow the instructions, given below, for completing the trip information in Section II of this form:

1. "Trip Number", Item 1 - Number the trips in succession, starting with Number 1.
2. "Trip Destination", Item 2 - Enter the full street address and municipality of the first and each succeeding trip destination. If the exact address is not known, refer to a prominent building or landmark close by, or give the nearest street intersection.
3. "Trip Purpose", Item 3 - In this column enter the particular number of category listed here that describes best the purpose of a trip.

1. Pick-up Goods	5. Base of Operations (Return to Base)
2. Deliver Goods	
3. Both Pick-up <u>and</u> Delivery	6. Personal Business
4. Other Work Connected Business	7. Service Call
4. "Type of Establishment at Destination", Item 4 - Describe the type of establishment visited at each trip destination, such as grocery store,

department store, service station, fabricating plant, house, et cetera. Note whether establishment is office or plant and describe. State if store is wholesale or retail. Be specific. If you are not certain of the type, give name of establishment.

5. "Time of Trip", Item 5 - Enter to the nearest minute the time of starting each trip, and the time of arrival at destination. Encircle a.m. or p.m.
6. "Principal Commodity Carried (for trucks only)", Item 6 - Enter the principal commodity carried on the trip, such as bread, gasoline, apples, beer, cement, mixed dry goods, et cetera.

Truck and Taxi Report, Form T5-92

The Truck and Taxi Report, Form T5-92, is the form on which you, the interviewers, will record the trip information for the sample vehicle. It is essential that this form be filled out completely and accurately, since the information gathered is the basis for all future analysis of truck and taxi travel in southeastern Wisconsin.

This report will be used on the day following the travel day to record all of the trips made by the sample vehicle. Normally, you will fill out this form at the time of the interview.

Use the Truck or Taxi Trip Log, Form T5-93, which the respondent has completed, as a guide in filling out this report. The information that the respondent has recorded on the trip log must be carefully checked and verified and then transcribed on the truck and taxi report. If the respondent has not completed the trip log, you will obtain the missing information through oral interview and record it on the truck and taxi report.

The Truck and Taxi Report, Form T5-92, consists of three sections:

- Section I: Contains the information needed to identify the sample vehicle
- Section II: Contains information concerning all trips made by this vehicle during a 24 hour period.
- Section III: Contains information about the calls made, editing, and coding control.

Specific Instructions for Completion of Section I include:

- 1 & 2. "Owner, Address, Municipality", Items 1 and 2 - You will enter this information from the "List of Addresses", Form T5-91. The truck so identified is the one whose travel and trip history will be recorded for the travel date shown.

It is important that information be gathered on this truck (no substituting) to insure the maximum of accuracy in our sample.

3. "Owner's Unit Number", Item 3 - This is the number sometimes assigned to the truck by the owner or operator for his own identification. This is

needed for two reasons: (1) to make call-backs easier when some part of the interview needs clarification; and (2) to identify trucks in case a supplemental sample must be drawn. In case the owner or operator does not assign numbers to his trucks, enter the word "none".

"Make and Year" - Enter make of truck and year model in the spaces provided.

4. "Travel Day and Date", Item 4 - Transcribe to item 4 from "List of Addresses", Form T5-91, the travel date for which trip information is to be obtained. Trip data are needed for the specific date indicated, again to insure maximum accuracy of the sample. You will contact the owner on the day following the assigned travel date. This means that you will ask about the previous day's travel.
- "Telephone Number" - Obtain the telephone number in case later checking, which can be accomplished by a phone call, is required. It may also be useful in arranging call-backs in the event that you cannot obtain the trip information on your first visit. In no case will trip information be obtained or an interview made by telephone call alone.
5. "Census Tract at Garaging Address", Item 5 - This will be left blank. It will be completed by the central office.
6. "Final Disposition Code", Item 6 - This item will be filled in by the editors in the district offices. The symbol "X" will be used to indicate a completed interview. The non-interview codes, 1 through 0, are listed on "List of Addresses", Form T5-91B. The codes shall be used to explain the non-interview.
7. "Sample Number", Item 7 - Sample number is to be entered from "List of Addresses", Form T5-91. This is a six-digit number which identifies each interview. The first two digits are a code for travel date. (See the "Travel Date Calendar", Appendix IV.) The first digit represents the week of the survey. The second digit is the day of the week---for example: Wednesday is "3" and Friday is "5". The third and fourth digits represent the list number. The fifth and sixth digits represent the line number from the left-hand column of Form T5-91. Use care to transcribe this number correctly.
8. "Garaging Address", Item 8 - Enter the complete postal address, including zone, of the location where the vehicle is normally kept overnight, or when it is not in use. "Municipality" - Enter the name of the city, village, or town of the garage in address. "County" - Enter the name of the county in which the address is located. In many cases this address will be the same as the address of the owner of the truck as shown on the registration records.

Sometimes, however, you will find that the address of the owner is at a place of business, whereas the driver may keep the truck or taxi at home.

In all cases, be sure to find out whether the truck is kept at the driver's home, at the place of business, or some other place. Be sure to determine the exact garaging address of every truck or taxi assigned to you for interview.

9. "License Number", Item 9 - Transcribe the license number from "List of Addresses", Form T5-91. Be certain that you obtain information for the vehicle carrying this number.
10. "Vehicle Type", Item 10 - Encircle the number of the description which applies to the sample vehicle covered by this report. Vehicle types are illustrated in the Appendix to help the respondent correctly identify the description. The vehicle types are as follows:
 3. Panel or pickup and two axle single tire
 4. Single unit dual tire
 5. Single unit 3 or more axles
 6. Combinations
 8. Taxi
11. "Business-Industry of Owner", Item 11 - Business-industry refers to the specific type of business or industry in which the truck is being used. Sometimes this may be indicated by the name of the firm. In most cases, however, it will be necessary for you to find this out at the time of interview. When recording industry or business, both the general and specific nature of the business should be indicated. For example, it is not sufficient to say "automobile parts" without saying whether the firm manufacturers or sells these parts, or both. Similarly, a statement such as "plumbing and heating" should be followed by a further statement showing the specific nature of the business.
12. "Total Trips Reported", Item 12 - Total trips refers to the total number of trips made by the sample truck on the specified travel date. After all the trip information for the particular truck has been obtained, the total number of trips made by that truck is entered on this line.
13. "Total Miles Traveled on Travel Day", Item 13 - Enter the total miles traveled by the sampling vehicle. This may be obtained by subtracting the speedometer readings shown on "Truck or Taxi Trip Log", Form T5-93.

The Instructions for Completion of Section II include:

1. "General" - In this section record, in order, all of the trips made by the sample truck or taxi on the travel date. It is important that all trips be entered to provide an accurate inventory of travel in the study area. If you find that one vehicle makes more trips than you can record in the space provided for trip information on Form T5-92, use as many

additional Forms T5-92 and T5-92A as are needed. Whenever additional forms are used, enter the name of the owner and the address at the top of the form, the license number of the vehicle, and the sample number. On all interviews enter the number of the sheet and the total number of sheets at the top of the page where it says "Sheet ___ of ___ Sheets". For example, if only one sheet is required, enter 1 in both spaces; if six are required, enter 6 in the last space and number consecutively 1-6 in the first space.

2. "Time Period Covered" - The time period for which you obtain trip information is defined as the 24-hour period starting 4:00 a.m. on the travel date indicated and ending at 4:00 a.m. on the succeeding day. If the truck or taxi is in motion or making a trip at 4:00 a.m. on the travel date, start the 24-hour period at the time of the beginning of that trip and end it correspondingly at the same time period on the succeeding day.
3. "Trip Definition" - A trip is defined as any movement of the vehicle that is at least two blocks in length (approximately 0.2 mile by speedometer) from origin to destination. The definition of a trip as being at least two blocks long will exclude many of the short stops made by the drivers of dairy trucks, bakery trucks, and the like.

Care must be taken to obtain a record of the trips by the designated truck or taxi on the travel date during working hours, especially when the vehicle is used by many people. In the case of fleet owners, you will find that often the same truck or taxi is used on different drivers, or that one driver will bring the truck into the area, another will deliver goods within the area, and a third will take the truck out of the area again. Another example is a plumbing company or a gas station where many drivers may use the same truck for service calls. Be sure to check for these possibilities, because we need all trips made on the travel date during the course of work by the specified truck or taxi.

4. "Trip Number" - Trip numbering is consecutive for each trip the truck makes on the travel date. For example, trip number 1 is the first trip, trip number 7 is the seventh trip, and so on.
5. "Origin" and "Destination" - The columns titled "Origin" and "Destination" refer to the specific addresses at which the trip started and ended. Since the trip information collected will be coded to a specific block within the study area, the address of the origin or destination must be known in terms of both the name of the street and the street number. Normally all of this information can be obtained from the trip log. The trip log must be carefully checked for completeness and accuracy. At other times, you will have to trust the respondent's memory for the correct addresses. If the truck driver is unable to furnish a specific address, you must obtain adequate information so that the specific address of the place (or origin or destination) can be identified. This may be done in any of several ways. For example, the driver might know that he went to a store and know what street it was on. He would probably know the name of the store and he might well know in what block

it is by the streets that bound that block. In this case, obtain the name of the store and as much information as you can get to identify the specific address of the store. In all cases, it is the interviewer's responsibility to obtain and verify information concerning the address of the origin and destination of a trip in order that it can be coded to a specific street address. Generally, the destination of one trip will be the origin of the next trip. It will be permissible to draw an arrow diagonally from the space in which "destination" is entered to the space for "origin" of the next trip for such cases.

6. "Trip Purpose" - Enter the appropriate number of the trip purpose listed at the bottom of the form that designates the purpose of the trip. The numbers and purposes are:

1. Pick up Goods
2. Deliver Goods
3. Both Pick Up and Delivery
4. Other Work Connected Business
5. Base of Operations
6. Personal Business
7. Service

Trip purposes 1., "Pick up Goods", 2., "Deliver Goods", and 3., "Both Pick up and Delivery" are self-explanatory and should be used whenever some type of goods or commodity is involved. In the case of a multi-purpose trip, that is, delivery of goods and eating a meal at the same destination, always give priority to the trip purpose depicting goods movement. In other words, eating a meal in the above example is incidental to the particular destination and is not the principal reason for the truck going to that particular point. Trip purpose 4., "Other Work Connected Business" refers to items where goods and service are not involved such as making an estimate of a job or buying gas for the truck. Trip purpose 5., "Base of Operations" refers to the company garage, store, warehouse, factory, service station, and the like, that is the place from which the truck operates for business purposes. For example, a bakery truck goes from its base of operations to some territory to deliver baked goods and then returns to the base of operations after completing the route. Trip purpose 6., "Personal Business" refers to any trips made by the driver for personal transportation whether they are to eat a meal, go to the dentist, go home, go to a movie, or any of many such possible reasons. Trip purpose 7., "Service" refers to work oriented trips where goods movement is not involved. Examples of this purpose include salesmen visiting different stores to obtain orders, television repairmen on service calls, a wrecking truck going to pull a car out of a ditch, taxi trips, etc.

7. "Land Use at Origin and Destination" - This term refers to the type of establishment at the origin and at the destination of the trip. This information is required in as much detail as possible. For example, it is not sufficient to know that the trip was made to a store. We must know what type of store, whether it be a grocery store, dry goods store, department store, or what. Similarly, if a person makes a trip to a manufacturing plant, we must know what is manufactured at that plant.

The land use at any address must be the predominant activity at that address, not necessarily the driver's activity there. If a vehicle is garaged at the home of the owner or driver, land use is residential, not garaged.

A truck used in highway construction may be garaged at a gas station. In this case, the land use would be fuel and oil retailing. The fact that trucks are also parked at this address is incidental.

Land use at base will not always agree with the business and industry of the owner. For example, a milkman will have milk retailing as his business but lists a wholesale dairy as his base. Land use in this case would be wholesale dairy.

8. "Time of Start and Arrival" - This term means the time the truck started on the trip from the address at the origin and the time it arrived at its destination. This information must be obtained as accurately as possible. In other words, obtain the time to the nearest minute if at all possible, and encircle a.m. or p.m. to specify whether it is morning or afternoon.
9. "Principal Commodity Carried" - This term refers to the specific item which made up the principal cargo such as bread, gasoline, apples, beer, cement, mixed dry goods, etc.

The truck may be on its way to pick up goods and is not carrying any commodities. If this is the case, write empty.

Other trucks will carry equipment to perform service. Enter the type of equipment carried.

Taxis will usually carry people, but occasionally they are used to transport goods.

The Instructions for Completing Section III include:

1. "Calls Made" and "Appointments" - Enter the date and time of each call you make to obtain the interview in the part headed "Calls Made". In the space under "Appointments" enter the date and time of appointments made. Be sure to keep appointments. If for some reason you cannot keep an appointment, telephone the respondent to inform him.
2. "Report Completed" - Enter the date and time and your initials when you have completed the report.

3. "Coding Control" - Leave this blank.
4. "Remarks" - Use this space to enter any remarks that might be helpful in explaining an entry. Also use this space to explain the reason for a noninterview report.

SPECIAL PROBLEMS

Unforeseen problems will arise in the course of interviewing. No training program or manual can completely cover everything. However, some abnormal situations will be discussed below. You must consult your supervisor whenever other problems arise which are not covered by these instructions:

1. Vehicles Not Used on Travel Date - These schedules should be marked "no trips" and returned as completed interviews. Section I of these truck and taxi reports must be completed, however. Also, in the lower right-hand corner under the "Remarks" column, the reason for no trips being made should be listed.

When a vehicle is not used on the travel date because there is no work for it, the interview is a completed interview with no trips and no miles.

If the vehicle is out of use for repairs, this is a completed noninterview and is coded "0".

2. Vehicles Not Used on Public Street - When the vehicle is used on private property only, such as a farm, on the travel date, the interview is a completed interview with no trips and no miles. The truck and taxi report is marked "Not used on public streets or highways on this date".

If a vehicle was used between two points located less than two blocks (approximately 0.2 miles) apart on the travel date, this is a completed interview with no trips and no miles. This report should be labeled "not used more than two blocks (approximately 0.2 miles) from base of operations on travel date".

3. Vehicles that have been junked should have their reports marked "Junked" and returned as a completed noninterview, unless the owner has transferred the license plate to a replacement truck.

In the State of Wisconsin, an owner may dispose of a truck, retain the license plate and attach it to another vehicle he has acquired, provided he follows appropriate registration procedure. In any case, trip information is needed for any truck bearing the designated plate.

4. Sold Vehicles - When a vehicle is sold or traded and the license plate goes with the truck, locate the new owner, if possible, and complete the report.
5. Moved Vehicle - Sometimes it may happen that the owner of a vehicle has moved and taken the vehicle with him. His new location must be determined and if it is outside the Region, the report should be noted as such and returned as a completed noninterview. If he has relocated within the

Region, you will contact him and complete the interview. If he has moved within the Region but out of your area, you will immediately notify his supervisor and the vehicle can be reassigned to you in that area.

6. Vehicles Registered In The Region And Operating Outside The Region - Trips extending beyond the internal area should be reported if a part of the trip is made within the Region. However, trips made entirely outside the Region should not be reported. Businesses such as utility companies may register all of their vehicles out of one office and assign them over a wide area and operate some of them completely out of the Region. These vehicles assigned out of the Region would have reports which would be labeled "assigned outside the Region". These would be completed noninterviews and would have the assigned locations indicated on the reports.
7. Interview Completed Before Travel Date - When the interviewer is able to get a completed report on the day before the travel date, his completed report is to be dated and otherwise treated as a completed report as of the day after the travel date. This could occur when an auto carrier is leaving the Region for several days. You will report this as one call.
8. Sampling Errors - If a vehicle listed on "List of Addresses", Form T5-91, is found to be other than a truck or taxi, this is an error in sampling. It is still necessary to make out a "Trip Report for Truck and Taxi", Form T5-92, for this vehicle. The "Final Disposition Code" would be "0". Note the "Sampling Error" on the "Remarks" column. Do not interview this vehicle.

If a vehicle listed on "List of Addresses", Form T5-91, has a rural address, is found to be outside of the interviewing area, but within the Region, the vehicle should not be interviewed. In the "Remarks" section of the report write "Sampling Error".

When a vehicle of this category is encountered, you must return this schedule to the supervisor as soon as possible.

9. Principal Commodity Carried - The principal commodity carried refers to the material or items on the vehicle that makes up the majority of the load, not the commodity or item which is picked up or delivered at a particular stop. Persons riding in the cab of the truck are not recorded as a commodity. Persons riding on the truck when their presence is concerned with the loading and unloading of the truck are not considered a commodity.

Persons being hauled to or from work on a truck but not in the cab should be considered a commodity. Examples of this would include a military truck transporting soldiers or a park commission truck transporting park laborers. In these examples the primary purpose of the trip is to carry passengers.

When a truck is used for personal transportation such as the owner using the truck to pick up ordinary household supplies (groceries, a gallon of paint or other personal items), the truck should be considered "empty".

The trip should be coded "Personal Business". If the personal commodity is large in size and requires a truck to carry it, the commodity should be listed.

10. When to Code "Service" - If the operator of the truck uses the truck to carry tools, fittings, or miscellaneous small parts, list the commodity carried as "Tools and Supplies" but code "Service". The type of tools carried should be specified. Trucks of this type include those used by repairmen and servicemen.

Services which include waste material and garbage collection, dead animals and other refuse collection would not be included in services. These items should be treated as commodities.

Daily Report, Form T5-94

The Daily Report, Form T5-94, is your official daily record. On this report you will show the status of each sample unit of your workload for a given day. It is also the basis on which your pay, travel and other reimbursement is computed. Prepare your daily report at the close of each work day and deliver it to the district office on the morning of the next work day.

The following instructions will guide you in completing this form:

Section I

Line 1 Column A - Enter the sample numbers of today's assignment from Form T5-91.

EXAMPLE - 3101 1-10

Column B - Enter the number of completed interviews in today's assignment.

Column C - Enter the number of completed noninterviews in today's assignment.

Column D - Enter the number of schedules which have been partly completed.

Column E - Enter the number of schedules in today's assignment in which one or more calls have been made but respondent was not at home.

Column F - Enter the number of schedules in today's assignment in which no call was made.

Column G - Enter the number of trips recorded for completed interviews in today's assignment.

Line 2 Column A - "Carry Over Work" - List the sample numbers or units still not complete from previous assignments.

Columns B

through G - Complete these columns in the same manner as line 1 for each sample number listed.

Line 3 Column A - Enter the total number of sample numbers listed.

Columns B

through G - Enter the sum of the entries for each column.

Section II - In this section make your official daily report of hours worked, authorized mileage, and other items for which you claim reimbursement. These include:

1. "Speedometer Readings" - Enter under "Out" the speedometer reading as you start out for work from the district office. Under "In" record the reading at the place of your last call for the day. (Travel expense cannot be claimed for travel from home to the district office nor from the place of the last call to home. Travel expense, naturally, cannot be claimed for any personal travel made.) Enter the total number of miles on official business for which reimbursement is claimed.
2. "Carfare Claimed Today" - Enter the number of authorized fares used for official business travel, and the amount due. Include under carfare the number and total amount of authorized parking lot and meter fees paid for official business stops.
3. "Telephone Calls" - Enter the number of telephone calls made for official business purposes, and the amount due, allowing yourself 10 cents for each call made from home. Itemize all toll calls on the reverse side of Form T5-94. "Total Amount Claimed Today." Enter the total amount claimed for reimbursement of official business expenses.
4. "Hours Worked Today" - Enter the number of hours worked, to the nearest quarter hour. Certification. Be sure you sign your report. It is not valid otherwise, and your claim for pay and reimbursement of expense cannot be allowed without your signature. "Work Date, Name and District." Enter the date covered by this report, your name, and the number of the district in which you worked on this date. The Milwaukee Area is district 0, and the combined Racine and Kenosha Area is district 1.
5. "Copies Required" - Three copies of this report are required. The original and one copy must be turned into the district office. You should retain a copy for your personal record.

"Comments" - Use this space to enter any remarks that may help explain some unusual situation that might be unclear to district office personnel.

THE TRUCK-TAXI SUMMARY FORMS

The truck-taxi summary forms, Weekly Progress Report, Form T5-96, Weekly Performance Summary, Form T5-97, and Quality Control Report, T5-98, will be prepared by district office personnel. These forms are discussed in Part VII of this manual.

THE ADMINISTRATIVE AND EXPENSE FORMS

All administrative forms will be prepared by district office personnel. These will include the expense vouchers, time and attendance reports, requisitions, performance rating reports and other similar reports as required by the internal surveys supervisor. These forms, also, will be discussed in Part VII.

10

Part VI

ADMINISTRATIVE PROCEDURES - DISTRICT OFFICE

This part of the manual outlines procedures for operating the truck-taxi district office. All office personnel must familiarize themselves with this portion of the manual, with the forms and their use, and with the procedures for processing and control of the interview schedules.

Administrative and technical memoranda and orders will be issued by the internal survey supervisor to supplement the instructions in this manual. In addition, administrative and technical orders may be issued by the director. Such memoranda may supersede instructions in this manual and should be filed in numerical sequence in a binder.

REQUISITION AND CONTROL OF SUPPLIES, EQUIPMENT, AND SERVICES

The quantity and variety of material and forms used for the truck-taxi survey is large; consequently, it is important that a careful control be maintained. An initial supply of forms and supplies has been furnished. As additional supplies and materials are needed, they should be requisitioned through the internal survey division as outlined below. A list, as well as examples, of many of the forms referred to in this manual has been provided in Appendix A.

Supplies

All district office personnel have been provided with a portfolio containing a truck-taxi manual, clip board, forms, pencil, map, etc. The bulk supplies furnished by the internal survey division should be adequate to start operations.

Requisition Forms

A hand inventory of all forms should be maintained so that requests for additional supplies may be made at least a week prior to the time stock will run out. Requests should be made by means of a memorandum to the administrative division of the study. Emergency requisitions may be made by telephone.

Requests for Furniture, Equipment, Supplies, and Services

Requests for furniture or other nonexpendable items should be made in writing to the internal survey supervisor, with an explanation of the need for the items. Acquiring services that may be required for the proper operation of the district office is the responsibility of the district chief. For janitor service, cleaning, and the like, the district chief should obtain informal bids from local contractors and vendors, and submit a request to the internal survey supervisor with pertinent information about the cost of service and what the service will include. If approval is granted, the district chief will be authorized to obtain the service, and he will be instructed on the proper procedure.

Repairs

Repairs that may be necessary to furniture or to the office space should be reported to the internal survey supervisor. No action should be taken by the district chief to obtain repairs locally. Such arrangements will be made through the internal survey supervisor only.

FILING PROCEDURES

Bulk Materials

All bulk materials received in the district office are to be stored in an orderly manner. This will include schedules, reporting forms, office supplies, and the like.

Reference Materials

It is important that the district truck-taxi chief and other office personnel have the pertinent materials, forms, and instructions available for immediate reference. Changes or corrections to the truck-taxi manual or to other instructional or reference materials, must be made upon receipt from the Waukesha office. Arrangements must be made to promptly relay any new or revised instructions involving their work to interviewers and lead interviewers.

Correspondence, Reports, and Records

All correspondence, reports, and records should be filed in an orderly manner in properly indexed file folders. Maintenance of files is a housekeeping function that should be the responsibility of the editor.

PERSONNEL

The internal survey supervisor will undertake the recruiting and screening of applicants. Obtaining a satisfactory score on a qualifying aptitude test will be a part of the selection process, together with a personal interview and a reference check. It will be important to develop a reserve list of qualified persons to replace interviewers who resign or are unable to do satisfactory work. In this regard, persons who apply at the district office for employment should be referred to the internal survey supervisor at the central office for employment processing. It is desirable and necessary for district chiefs to work very closely with the internal survey supervisor on all matters relating to personnel. District chiefs will notify the internal survey supervisor at once when it is determined that a replacement must be made or additional personnel are needed.

The assistance of the internal survey supervisor should be requested in dealing with personnel problems that may arise during the course of the survey.

TIME AND ATTENDANCE REPORTING

Hours of Duty

District office hours are from 8:00 a.m. to 5:00 p.m. Tuesday through Saturday of each week for district truck-taxi personnel. These hours apply particularly to

10/12/54

31.

the district chief and editors. Lead interviewers will normally report to the district office each day. However, their hours of duty during the day may be adjusted by the district chief to enable them to accomplish necessary work. One hour is allowed for lunch. It is the district chief's responsibility to insure that the hours of duty, as specified above, are maintained.

Payroll, Time, and Attendance Report

All district office employees will be listed on time and attendance report forms to be provided.

TRAVEL EXPENSES

Travel will be reported by all district office personnel on Form T5-78, Interviewer Expense Record. This is an official form used by the SEWRPC.

This form will be filled out with the information on section II of the daily report form. Two copies, one original and one carbon (typed or in ink), are required. The original copy will be sent to the central office, the carbon copy will be retained by the district office. Both copies are signed by the employee and approved by the district chief who will initial the form.

Traveling expense vouchers should be submitted on the first and the sixteenth days of the month. An exception to this rule may be made at the beginning of a project, when an additional voucher may be submitted approximately one week after the employee starts incurring traveling expense.

Official Use of Personal Auto

Personal car use will be paid at the rate of 7¢ per mile for all survey connected trips. A record of the mileage of the personal car operated shall be kept by the operator on Daily Report, Form T5-76. This form will be made out in triplicate. The original and one copy will be brought to the district office. The original copy will then be sent to the central office, and the second copy will be retained by the district office. The third copy is to be retained by the individual for his own record.

IDENTIFICATION CARDS

Identification cards will be prepared and issued by the personnel division. Identification cards must be signed by the employee to whom issued.

Control

A firm control must be placed on identification cards at all times. Each employee should be instructed by his supervisor that when he is released he will have to turn in his identification card before his final salary check can be issued.

Loss

In case an identification card is lost, destroyed, or mutilated, the employee must sign a statement to that effect, including the date lost and the circum-

stances surrounding the loss, destruction, or mutilation of the card. This statement will then be forwarded to the internal survey supervisor who will place it on file with the personnel division before a new card can be issued.

Proper Use

It should be pointed out to each employee that to maintain good public relations, proper use of these cards is important. Improper or indiscriminate use of the cards will be considered grounds for dismissal.

RESIGNATIONS AND TERMINATIONS

Resignations

District chiefs will obtain resignations in writing from all truck-taxi personnel who voluntarily terminate their employment with the study.

Letters of resignation should include an effective date, written signature of employee, and the reason for resignation. Forward letters of resignation to the internal survey supervisor immediately.

Terminations

It may be necessary to terminate the employment of persons who are unable to do satisfactory work, or whose conduct in the performance of their work is such that their retention is undesirable. Where termination is indicated, it is important that the employee be given fair and impartial treatment. Summary dismissal of an employee will be approved only in cases where:

1. The employee has falsified information on the interview schedule, a claim for travel expense, or time worked for pay.
2. The employee's personal conduct is such as to bring discredit to the organization or violate common decency.

A fully documented report of the case will be prepared and forwarded to the internal survey supervisor for review and final disposition. The employee will be given no further work assignments until final disposition is made.

When it becomes apparent that an employee is performing unsatisfactorily, and in the judgment of the district chief the best interests of the study may be served by terminating the employee, the following steps should be taken:

1. Discuss with the employee the areas in which his performance is unsatisfactory, and what he must do to achieve a satisfactory level of performance.
2. Advise the employee he is being placed on a probationary or "trial" period of two weeks, and that at the end of that time a decision will be made as to whether or not his performance has improved sufficiently to warrant his retention.

3. When the employee is placed on probation, prepare a performance rating report. Forward the completed report with additional remarks about the case to the internal survey supervisor.
4. After the probationary period has expired, complete a new performance rating report recommending retention or termination of the employee and distribute copies as above.

PERFORMANCE RATING REPORT

The performance rating report is designed to provide an official record of all facts concerning an employee's work performance during his employment with the study. District chiefs should be fully informed about the program, and will follow the procedures outlined in the memorandum of instructions provided by the personnel officer.

COMMUNICATION WITH INTERVIEWERS

It is highly desirable to have interviewers report to the office daily, if possible. It is most important to review the schedules completed by each interviewer, on a daily basis, to insure that schedules are being properly completed. In addition, the interviewer will have an opportunity to improve his performance by clearing up questions and problems through frequent contact with the office.

After approximately two weeks of experience, the interviewing staff in each district should meet as a group at least once a week. At these meetings several things can be accomplished.

1. Assignments can be issued.
2. Interviewers can obtain needed supplies.
3. New instructions can be issued.
4. Common problems can be discussed and ideas exchanged.
5. An excellent opportunity to build morale, teamwork, and healthy competition is provided.
6. Training review exercises, mock interviews, and special meetings can be scheduled to improve quality.
7. Such meetings should be planned well in advance, and an effort should be made to hold the length to about an hour. The length of the meeting is at the discretion of the district chief, but avoid, at all costs, a disorganized, poorly planned, and drawn out meeting.

Daily telephone call-in procedure for interviewers should be established.

1. The first part of the document is a letter from the President of the United States to the Congress, dated January 3, 1862. It is a very important document, as it contains the President's annual message to Congress, which is a key document in the history of the United States.

2. The second part of the document is a letter from the Secretary of the War Department to the Secretary of the Navy, dated January 10, 1862. It is a very important document, as it contains the Secretary's report on the state of the war, which is a key document in the history of the United States.

3. The third part of the document is a letter from the Secretary of the War Department to the Secretary of the Navy, dated January 10, 1862. It is a very important document, as it contains the Secretary's report on the state of the war, which is a key document in the history of the United States.

4. The fourth part of the document is a letter from the Secretary of the War Department to the Secretary of the Navy, dated January 10, 1862. It is a very important document, as it contains the Secretary's report on the state of the war, which is a key document in the history of the United States.

5. The fifth part of the document is a letter from the Secretary of the War Department to the Secretary of the Navy, dated January 10, 1862. It is a very important document, as it contains the Secretary's report on the state of the war, which is a key document in the history of the United States.

6. The sixth part of the document is a letter from the Secretary of the War Department to the Secretary of the Navy, dated January 10, 1862. It is a very important document, as it contains the Secretary's report on the state of the war, which is a key document in the history of the United States.

7. The seventh part of the document is a letter from the Secretary of the War Department to the Secretary of the Navy, dated January 10, 1862. It is a very important document, as it contains the Secretary's report on the state of the war, which is a key document in the history of the United States.

8. The eighth part of the document is a letter from the Secretary of the War Department to the Secretary of the Navy, dated January 10, 1862. It is a very important document, as it contains the Secretary's report on the state of the war, which is a key document in the history of the United States.

9. The ninth part of the document is a letter from the Secretary of the War Department to the Secretary of the Navy, dated January 10, 1862. It is a very important document, as it contains the Secretary's report on the state of the war, which is a key document in the history of the United States.

Part VII

WORK CONTROL AND REPORTS IN DISTRICT OFFICE

GENERAL INSTRUCTIONS FOR CONTROL OF SCHEDULES

It is essential to efficient district office operations that the procedures detailed below be followed to insure that schedules are accounted for at all times. Some basic rules that must be observed are:

1. There must be a schedule for every sample address listed on the List of Addresses, Form T5-91.
2. Schedules must be checked in, sorted, posted and reviewed on a daily basis. Only in this way can a uniform flow of work be maintained and the necessary control of timing on the required reports be accomplished.
3. Editing must be kept current. Editors should edit the schedule on the day they are received so that any remedial action that may be required can be taken before the deadline for completing the interview has passed.

Filing List of Addresses, Form T5-91

There are three copies of each List of Addresses; the white copy, Form T5-91, is the interviewer's daily assignment; the pink copy, Form T5-91A, will remain in the district office; the yellow copy, Form T5-91B, will remain in the central office.

The white and pink copies of the List of Addresses will be forwarded to the district office. A separate file drawer will be used for each of the three stages of work on list of addresses as follows:

1. Work to be assigned
2. Work in process
3. Work completed

The list of addresses will be maintained by travel date in these file folders. In other words, one file folder will contain all list of addresses forms for one and only one travel date. Folders will be arranged in travel date order within each file drawer.

As lists of addresses in the "Work to be Assigned" file are issued to interviewers, the office copy T5-91A will be transferred to the "Work in Process" file. When all schedules for one travel date have been received, posted, edited and transmitted to the central office, the folder containing the list of addresses will be transferred to the "Work Completed" file drawer.

Except in unusual cases a file folder should not remain in the "Work in Process" drawer beyond four work days after a travel date. Thus, for example, all schedules for all lists of addresses with a Monday travel date should be received, posted and edited by Friday.

Processing Schedules in the District Office

Schedules received from interviewers will be processed daily. The processing steps are as follows:

1. Each day the schedules received will first be sorted by sample number. All schedules with the same number would therefore be from one List of Addresses.

After sorting schedules in this manner, the Form T5-91A (office copy) with the corresponding sample number, will be pulled from the "Work in Process" file for each group of schedules. Applicable columns of Form T5-91A will be posted for each schedule.

Any editing corrections made by the District Chief, lead interviewers, or editor will be made with red pencil. When the final schedules for one List of Addresses (plus any additional schedules) have been received, edited, and posted, the white Form T5-91 (interviewer's copy) should also have been received. All schedules for the assignment, together with the white Form T5-91, will then be transmitted to the central office. The person preparing the transmittal will enter his initials and the date on Form T5-91 in the place provided in the lower right-hand corner.

2. If editing reveals missing information which should have been obtained by the interviewer and which will require further field work to complete, the schedule, with an accompanying note of explanation, will be turned over to the District Chief for action.
3. When the follow-up is completed by the interviewing section, the schedule will be returned to the editor.
4. All schedules for any given travel date must be transmitted to the central office within six (6) working days following the travel date.

INSTRUCTIONS FOR COMPLETING REPORTS AND CONTROL FORMS

List of Addresses (office copy) Form T5-91A

Columns 1 through 4 - These entries have been preprinted.

Column 5 - Enter the month and day, for example -4/14- for each completed interview schedule. This date will be obtained from section III of the Truck and Taxi Report, Form T5-92. For each noninterview, enter the correct noninterview code number and encircle 4, after reviewing the interviewer's explanation in the space provided for "Remarks" in section III. All noninterview schedules will be directed to the District Chief. He will assign them for follow-up action wherever possible.

Column 6 - Enter the date on which the schedule was received in the district office.

Columns 7 through 9 - Enter an "X" in the appropriate column to indicate the number of calls made by the interviewer to complete the schedule. This information is found in section III under "Calls Made". In cases where three or more calls were made enter an "X" in column 9.

Column 10 - Enter the number of trips recorded on the schedule. This will be obtained by actual count of the trips listed.

Column 11 - Enter the date of editing.

Column 12 - Enter the date and the name of the person assigned for any schedule returned to the field for further information.

Column 13 - Enter the date the schedule was returned from follow-up to the district office.

Column 14 - Enter any notes or comments that will help explain unusual cases.

When all schedules have been posted to Form T5-91A, totals will be entered in items A through G in the lower right part of the form as follows:

Line A - Enter the total number of schedules assigned on this list in the first box on Line A. Ignore the remaining boxes on Line A.

Line B - Enter the total number of completed interviews made on first call in Box D; second calls in Box E, three or more calls in Box F. Enter the total number of trips in Box G from column 10.

Line C - Ten numbered spaces have been provided to correspond to the ten types of noninterviews. Count the number of encircled noninterviews and enter the number of schedules by type of noninterview in the appropriate space or spaces.

Weekly Performance Summary, Form T5-97

The Weekly Performance Summary is a summary of entries from Forms T5-91A. It should be completed on a daily basis. For example, all schedules for a Monday travel date should be received and posted to Form T5-97 by Friday, so that totals for all List of Addresses for that date can be summarized and entered on Form T5-97. Following this timing, all schedules for Friday should be received, posted, totalled and summarized by Thursday of the following week.

Enter Heading Items - These are self explanatory.

Travel Day - Enter the date in the space where day of week is printed.

Total Units Assigned - Count the number of sample addresses listed on Forms T5-91A for each travel date and enter the total. This will be the sum of entries for all assignments on the specified travel date.

Completed Interviews - This column is divided into four parts as follows:

(a) Number completed. Enter the total number of completed schedules.

- (b) Completed in--one call. Enter the number of completed schedules in one call.
- (c) Completed in--two calls. Enter the number of completed schedules in two calls.
- (d) Completed in--three or more calls. Enter the number of completed schedules in three or more calls.

Trips Recorded - Add the entries in Box G, Form T5-91A for all completed schedules for the travel date and enter the total.

Total Noninterviews - Enter the total number of noninterviews for all lists for each travel date.

Completed Noninterviews - Enter the total number of noninterviews by type for all lists for each travel date.

Totals of Week - When summary totals for each travel date have been entered, complete the "Totals for Week" line.

Previous Cumulative Totals - Enter on this line the "Cumulative Totals to Date" entries from the previous weeks report.

Cumulative Totals to Date - Add the "Totals for Week" entries to the "Previous Cumulative Total" to obtain the new "Cumulative Totals to Date".

Weekly Progress Report, Form T5-96

This form is basically a summary of the totals on the Weekly Performance Summary, Form T5-97. The following instructions will be used in completing this form.

Item 1 - Enter the number of completed schedules on line 1. Enter the number of completed interviews on line 10, and the number of completed noninterviews on item 16. The sum of item 10 and item 1 will equal the total "Completed Schedules".

Item 2 - Enter the totals from Form T5-97 of each type of noninterviews on the appropriate line 1 through 0. Add the number of noninterviews in codes 1 through 5 to obtain the total number of Type A noninterviews. Add the number of noninterviews in codes 6 through 0 to obtain the total number of Type B noninterviews. The percentage of entries will be determined by dividing the number of noninterviews by the total number of completed schedules.

Items 2,

3 & 4 - Entries for these items will be taken directly from totals shown for these items on Form T5-97. The percentages will be computed by dividing the entry on each of items 2, 3 and 4 by the total number of completed schedules.

Item 5 - The total trips recorded will be taken directly from Form T5-97.

Item 6 - Divide entry on item 5 by entry on item 10.

- Item 7 - Divide entry on item 5 by entry on item 1, (completed schedules).
- Item 8 - Add entries on items 10 and the entry on item 16.
- Item 9 - Divide entry on item 5 by entry on item 8.
- Item 10 - Enter the average number of persons assigned to interviewing during the week. This will not include persons given spot assignments but will include lead interviewers substituting for regular interviewers.
- Item 11 - Interviewing man hours will not include spot assignments but will include substitute man hours.
- Item 12 - Divide the entry on item 1 by the entry on item 11.
- Item 13 - Enter the total miles driven by all interviewers during the week. This will include spot assignments.
- Item 14 - Divide entry on item 13 by the entry on item 1.

Totals to Date - The entries in this section of the report are simply cumulative totals including the current week. The entries will be obtained and/or computed as given above.

Estimated Workload - Enter the estimated total number of schedules to be assigned to the district office for the full interviewing period.

Percent Workload Completed - Divide the total estimated workload by the total completed schedules to date.

Quality Control Report, Form T5-98

The quality of the interviews obtained is important to any survey and of special importance where sampling techniques are employed. Each interview obtained in the truck-taxi survey represents twelve in the Milwaukee Area and four in the combined Racine and Kenosha Area. Therefore, any errors of omission or commission are magnified tremendously. Failure to obtain all the trips performed by a truck would produce a serious loss of vital data if such under-reporting were not detected and corrective steps taken. Failure to obtain an interview for a specified truck would create serious questions of reliability and validity of the data. Substitution of a vehicle for the specified sample vehicles cannot be tolerated.

To be effective, a quality control program must be carried out systematically and with a positive approach. It is a means of developing the interviewer's ability and is an aid in a continuous training program aimed at obtaining the most complete and accurate data possible. Interviewers will be informed that their work is subject to recheck at any time.

The quality control program will be one of the basic duties assigned to the lead interviewers. The district chief should participate to the extent possible and should review the results of telephone and field reinterviews completed by the lead interviewers.

The general procedure for recheck is outlined below. At least ten (10) interviews should be rechecked for each interviewer during each of the first two weeks he works, or 20 percent and five (5) thereafter, or 10 percent of his weekly assignment. The schedules rechecked should be selected at random throughout the week. The recheck may be conducted by telephone or personal call. This should be done as soon after the interview as possible. The results of the recheck will be reported on "Quality Control Report", Form T5-98 in duplicate, with one copy for the district chief and one for the internal survey supervisor.

When recontacting a truck owner, explain that you are Mr. (interviewer's name) supervisor, and that you want to verify some of the information about the interview. You should develop an approach you find effective.

The Quality Control Report, Form T5-98, will be used to summarize results of the recheck of interviewer's completed schedules. It will be maintained in the District Office in duplicate. The duplicate copy will be sent to the Central Office when all of the rechecks have been completed. It will be reviewed by the District Chief, and should be available for review by members of the Study staff. The following instructions will be used in completing this form.

Prepare a set of Form T5-98 in duplicate for each interviewer.

Enter interviewer's name and district in the heading.

Column A - Enter in the date of the recheck.

Column B - Enter in the sample number of the truck-taxi recheck.

Column C

thru J - Enter in one of the entries indicated below.

Column C - Address - "Is this the correct address?" As given on Form T5-50, list of addresses, enter yes or no.

Column D - Dear Truck-Taxi Owner Letter - "Did you receive a letter before the interviewer called?" Enter yes or no.

Column E - I. D. Card - "Did the interviewer present his identification card?" Enter yes or no.

Column F - Conduct - "Was the interviewer courteous, etc.?" Enter S - Satisfactory or U - Unsatisfactory.

Column G - Trips - Quote the number of trips on the trip logs then ask "Is there something more you'd like to add?" Enter yes or no.

Column H - Delivered Pre-Interview Forms - "Were Trip Log forms delivered to you personally by the interviewer?" Enter yes or no.

Column I - Comments - Enter any other comments that might be of assistance in evaluating the interview. If the respondent can verify trip date reported, enter appropriate comments on results, etc.

41.

It is suggested that each interviewer's record be maintained in a three-ring binder with dividers and tabs with interviewer's name. Additional sheets can then be added as needed.

Check respondent answers to these questions in the spaces provided on this report form. Enter under "Comments" any pertinent information given by respondents, favorable or otherwise. Any derogatory information about the conduct of an interviewer will be reported to the district chief immediately. The district chief should obtain all the facts, including the interviewer's explanation and make a written report to the Internal survey supervisor. Any case in which there is clearly evidence of gross misconduct or fraudulent enumeration will require summary dismissal.

1. The first part of the document is a letter from the President of the United States to the Congress, dated January 3, 1862.

2. The second part is a report from the Secretary of the Treasury, dated January 3, 1862, on the state of the Treasury.

3. The third part is a report from the Secretary of the Interior, dated January 3, 1862, on the state of the Interior.

4. The fourth part is a report from the Secretary of the Navy, dated January 3, 1862, on the state of the Navy.

5. The fifth part is a report from the Secretary of the War, dated January 3, 1862, on the state of the War.

6. The sixth part is a report from the Secretary of the State, dated January 3, 1862, on the state of the State.

7. The seventh part is a report from the Secretary of the War, dated January 3, 1862, on the state of the War.

8. The eighth part is a report from the Secretary of the Navy, dated January 3, 1862, on the state of the Navy.

9. The ninth part is a report from the Secretary of the Interior, dated January 3, 1862, on the state of the Interior.

10. The tenth part is a report from the Secretary of the Treasury, dated January 3, 1862, on the state of the Treasury.

11. The eleventh part is a report from the Secretary of the War, dated January 3, 1862, on the state of the War.

12. The twelfth part is a report from the Secretary of the State, dated January 3, 1862, on the state of the State.

13. The thirteenth part is a report from the Secretary of the War, dated January 3, 1862, on the state of the War.

14. The fourteenth part is a report from the Secretary of the Navy, dated January 3, 1862, on the state of the Navy.

15. The fifteenth part is a report from the Secretary of the Interior, dated January 3, 1862, on the state of the Interior.

16. The sixteenth part is a report from the Secretary of the Treasury, dated January 3, 1862, on the state of the Treasury.

17. The seventeenth part is a report from the Secretary of the War, dated January 3, 1862, on the state of the War.

Part VIII

EDITING

OBJECTIVES OF THE EDITING PROCESS

For the Southeastern Wisconsin Land Use-Transportation Study to successfully accomplish its objectives, all data collected and processed must be completely and accurately assembled. From the initial interview, through the coding and keypunching processes and through further machine processing, accuracy and consistency checks are continually employed. One of these checks consists of editing the schedules after they have been received from the interviewer and prior to coding.

The editing process has three primary objectives:

1. To improve the quality of completed schedules.
2. To allow immediate and effective follow-up action for omitted, erroneous or inconsistent entries.
3. To raise the level of performance of the interviewing staff in each office.

Improve Quality of Schedules

The first objective will be largely in the hands of the editors who, through careful editing, will detect the omissions, the erroneous entries, and the inconsistencies. Schedules passed on to coding after editing should be completely codable and should require no further follow-up. The errors found will become the basis for instruction and training of each interviewer on a continuous, systematic basis until the numbers of errors is reduced to a minimum. This procedure for continuous training of interviewers must not be allowed to lag or be ignored. The district chief will be responsible for insuring that errors found in editing are brought to the attention of the interviewer who made them and that corrective action results immediately.

Effective Follow-Up

The second objective is to make possible an immediate and effective follow-up on schedules requiring such action. Where practical, follow-up action may be accomplished by telephone. Other cases will require personal calls by either the interviewer or the lead interviewer. To be effective, it is most important that the schedules be edited the same day they are received in the office. An editing backlog could prove most damaging. When necessary, it will be expected that the editor be given assistance from the district chief and lead interviewers to insure that editing is kept on a current basis. This will facilitate an immediate pick-up of missing data and aid in correcting errors promptly while the information is still current. The district chief will be responsible for reporting to the internal survey supervisor any situation in the district offices which is causing an editing backlog or preventing current follow-up of "fail edit" schedules.

Raise Performance Level

The third objective is to raise the level of performance of the interviewing staff by calling errors to their attention. The results of editing must be considered by the district chief as an important element in evaluating an interviewer's performance.

THE EDITING PROCEDURE

The editing process may be considered as having two procedural parts. First is the general reading of the schedule to insure that all questions have been answered and that the answers given are consistent. Any lack of consistency must be accompanied with a logical explanation provided by the interviewer. The second part includes those detailed checks on completeness where specific comparison of different entries on the interview form can be made.

Errors

The types of errors found through editing can be classified into two categories, namely, errors of procedure and errors of carelessness.

Errors of procedure result through the failure of the interviewer to follow the instructions as set forth in the manual or through a lack of understanding or misinterpretation of definitions, such as the definition of a trip. Errors of this type also include inadequate or insufficient detail in occupation and industry, origin and destination, land use; inconsistencies in time of start and arrival or principal commodity carried.

Errors of carelessness include unexplained omissions, failure to complete summaries, failure to enter required check marks, or other obviously inconsistent entries on the trip report.

Errors of procedure and errors of carelessness will be the subject of personal retraining and review sessions with the interviewers to rectify such errors.

Edit for Completeness and Accuracy

Throughout the editing process, the primary attributes of completeness and consistency should prevail. The editor begins by reviewing the entire schedule and insuring, so far as possible, that complete and accurate information has been obtained for all items shown on the schedule. Examples of these items are as follows:

1. Vehicle type, total trips reported, and total miles traveled must be indicated.
2. Specific address information must be indicated for trip origin and destination.
3. Land use information must be specific.

Checking the Travel Pattern

After the review, the editor will read the schedule in detail to determine if the travel pattern of the truck or taxi is realistic. The best way to accomplish this is to picture yourself as the operator of the vehicle and to follow through the route of the vehicle by the trips recorded. Three examples of checks for realistic travel patterns follow:

1. Does the travel time agree approximately with the distance traveled?
2. In a round trip, that is, from home to work and from work to home, does the travel time of the outbound trip agree approximately with the travel time on the return trip? If not, has a trip been forgotten?
3. Does the address of the destination agree with the trip purpose or does the trip purpose agree with the land use? For example, does a truck normally deliver cemetery memorials to a bakery?

If any such inconsistencies are found, they should be duly recorded and the schedule and editor's comments returned to the district chief.

Items to be Checked

Following is a list of specific items that must be checked on each schedule. For each item checked, a check mark (✓) will be made in red pencil at the place indicated to show that the entry has been checked. If there is a discrepancy, an "X" will be placed next to the entry. The schedule will then be returned to the district chief with a note describing all of the reasons (if more than one) that the schedule failed to pass editing.

1. Items 1 and 2, "Owner and Address". The name of the owner and address should be the same as shown on Form T5-91 unless a corrected entry is indicated on Form T5-93.
2. Item 4, "Travel Day and Date". This must agree with the travel day and date shown on Form T5-91.
3. Item 7, "Sample Number". Verify the transcription of the sample number from Form T5-91 and make certain it is correctly entered in the coding blocks.
4. Item 9, "License Number". The license number must be the same as shown on Form T5-91. Be certain it is correctly entered in the coding blocks.
5. Item 12, "Total Trips Reported". The total number of trips reported must agree with the total number of trips shown on the report form, and must be entered in the coding blocks.

IMPORTANCE OF GOOD EDITING

The editing process must be considered as a most important tool with which district chiefs can build quality into the interviewing staff. A close and understanding working relationship between interviewing, editing, and supervisory

personnel must be encouraged in each office. The first and best place to emphasize editing is with the interviewer. Developing teamwork and cooperation is the most practical means of achieving quality work, which in turn will expedite the flow of schedules through the office. Consistent and complete schedules result in few editing and coding problems which, in turn will streamline the flow of schedules through the office. Well done schedules mean few editing and coding problems, with a consequent saving of time.

Part IX

TRAINING

GENERAL

Thorough introductory training is the best insurance against poor workmanship. The accuracy of survey results and the operating efficiency of the district offices will depend heavily upon how effectively and thoroughly the personnel are trained.

The introductory training periods for both supervisory personnel and for editors and interviewers can be accomplished easily in five days each.

The internal survey supervisor and the truck-taxi interview supervisor shall have the responsibility of training the supervisory personnel of the interviewing units, and although they will assist wherever possible, the major responsibility for training interviewers, editors and replacements, shall be in the hands of the district chief and the lead interviewers.

TRAINING SCHEDULE

A suggested training schedule for the initial interviewing staff, to be scheduled one week before the beginning of the survey, follows:

First Day - Orientation at the central office for all interview personnel. This will consist of remarks by the study director concerning the function of the Commission and the objectives of the land use-transportation study. Distribution of procedural manuals, interview forms and other necessary paraphernalia will follow this meeting and then the interview personnel will go to their respective district offices.

At the district offices, the interviewers and editors will study the procedural manuals and the interview forms.

Second Day - The district chief and lead interviewers will review the manual page-by-page with the interviewers and editors and also give step-by-step instructions for completing all interview and report forms.

In late afternoon, each interviewer and editor will deliver preinterview trip logs to four truck-owning establishments as a part of a mock interview program. These establishments will have been preselected by the district chief and will have received an advance letter of explanation prepared earlier by the district office.

Third Day - Supervisory personnel will prepare and give tests to interviewers and editors on completing interview forms. They will review and correct answers to the tests and discuss the errors found.

Fourth Day - A.M. - Interviewers and editors will obtain mock interviews at the establishments contacted on the second training day and return to the district office.

Fourth Day - P.M. - Supervisors will review mock interview forms and discuss errors found.

Fifth Day - A.M. - General review by interviewers of procedural manuals and interview forms with special emphasis on areas where errors have been found to be most common.

Fifth Day - P.M. - Interviewers will deliver preinterview trip logs for first two travel dates of regular interview schedule.

Training Techniques

The success of the training program will depend to a great extent upon how well the training staff prepares for it. This involves providing suitable physical arrangements as well as a thorough familiarity with the materials and careful advance planning. A few basic rules to remember are:

1. Have everything ready - yourself, the truck-taxi interview manual, sets of forms, a blackboard or some other means of illustrating points. (Large pieces of cardboard and grease pencils will do nicely.)
2. Provide adequate room away from noise and distraction. The room should have adequate ventilation and light.
3. Ask, "Any questions?" often, at appropriate places, as you present the instructions from the manual.
4. Liven up your presentation with appropriate stories and incidents that have happened to interviewers in the past.
5. At every possible opportunity, have the trainees do something to break up lengthy periods of listening only.
6. Avoid undue formality. Use a little informal language in presenting material.
7. Have the trainees participate in reading instructions occasionally rather than reading all the material yourself.
8. Remind trainees of the simplicity of most of the work. Don't give the impression that most of the work is complicated.
9. Don't hesitate to say, "I don't know" when a question is put to you for which you are not certain of the answer. Just say you will have to get the answer. In this way, you will not run the risk of giving misleading instructions.
10. Build up the trainees' confidence at every opportunity.

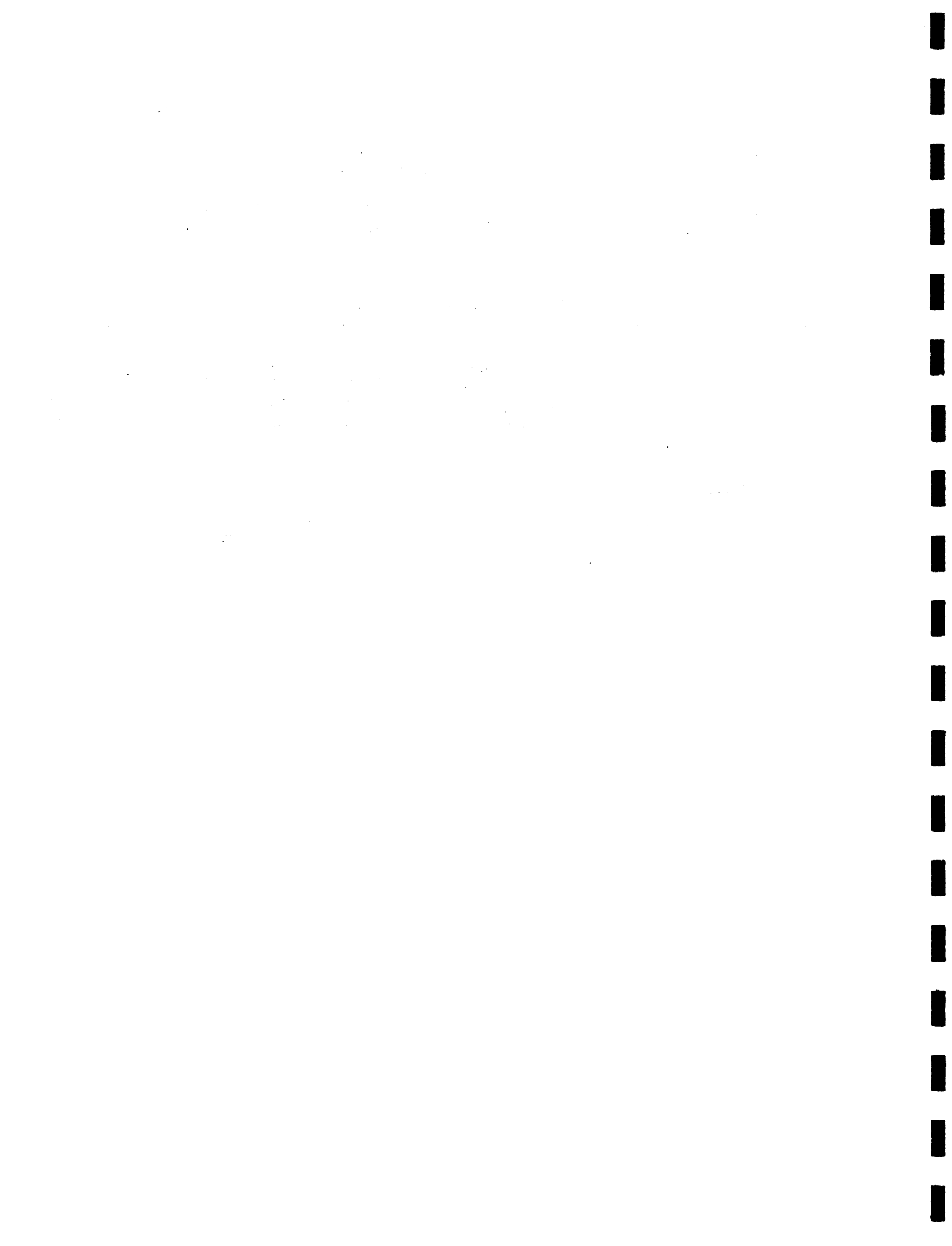
11. Not all persons learn at the same rate. Take extra time to train a slower, but potentially good interviewer.
12. Get your group to feel at ease and develop team spirit. Praise good work. A "pat on the back" helps greatly to build morale.

Supervisory Training

The training of the interview supervisory staff, one week earlier than that of the interviewers and editors, should consist of the same basic training plus specialized training on how to review completed work, observe and retrain interviewers, how to conduct the quality control program, and office procedures. Lead interviewers have a responsibility next to that of the district chief in the operation of the survey. Early in the survey operations, the district chief should delegate to them the responsibility for direct supervision of the quality control program.

Replacements

It has been experienced in other studies that if individual instructions are given to a trainee, such as a replacement, the training schedule can usually be curtailed to three days.



APPENDIX A



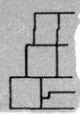
SOUTHEASTERN WISCONSIN REGIONAL PLANNING COMMISSION

916 NO. EAST AVENUE

WAUKESHA, WISCONSIN 53187

TELEPHONE LIBERTY 2-8083
SUNSET 6-8130

Serving the Counties of: KENOSHA
MILWAUKEE
OZAUKEE
RACINE
WALWORTH
WASHINGTON
WAUKESHA



Gentlemen:

As an operator of a truck or fleet of trucks on the streets and highways in the Southeastern Wisconsin region, your cooperation is requested in connection with the Regional Land Use Transportation Study now being conducted to determine traffic movements in the region.

Information about where, when and how people and vehicles travel is necessary in planning a sound and economical program for improvement of the region's streets and highways. The travel of trucks is a very important factor that must be considered.

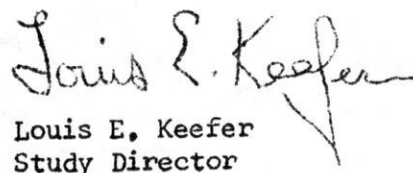
Travel information is being obtained about selected trucks in the region. Within the next few days our representative will call on you for information regarding the travel of the trucks listed by license number above. The information requested covers the travel of these trucks on

Our representative will ask for (1) the address of each stop made by the vehicle identified above on the day and date shown above, (2) the time of beginning and ending of each trip, and (3) the nature of the trip.

The data collected will be used for statistical purposes only. All trips will be grouped to show the pattern of daily truck movement in the region. This information will be used in a study for use by our local and state governments to provide improved roads and facilities.

Your cooperation in this important undertaking will be appreciated.

Thank you very much


Louis E. Keefer
Study Director

1. The first part of the report is a general introduction to the subject of the study. It discusses the importance of the study and the objectives of the research.

2. The second part of the report is a detailed description of the methodology used in the study. It includes information about the sample size, the data collection methods, and the statistical analysis techniques.

3. The third part of the report is a discussion of the results of the study. It presents the findings of the research and discusses their implications for the field of study.

4. The fourth part of the report is a conclusion and a summary of the findings. It provides a final assessment of the study and its contributions to the field.

5. The fifth part of the report is a list of references. It includes all the sources of information used in the study, such as books, articles, and other documents.

SOUTHEASTERN WISCONSIN REGIONAL LAND-USE TRANSPORTATION STUDY

LIST OF ADDRESSES

TRUCK AND TAXI SURVEY

SOUTHEASTERN WISCONSIN
REGIONAL PLANNING COMMISSION

TRAVEL DATE _____ DAY _____ DATE _____

TRAVEL DATE _____ DAY _____ DATE _____

INTERVIEWER _____

LIST NO. _____

SAMPLE NO. _____

LIST OF TRUCKS ☐

TAXIS ☐

LINE NO.	OWNER AND ADDRESS	VEHICLE TYPE	LICENSE NO.	DATE COMPLETED OR N. I. CODE *	REMARKS	RECEIVED IN CODING
1	2	3	4	5	6	7
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

*NON-INTERVIEW CODES—

TYPE A (TRIPS POSSIBLE)
1 REFUSAL
2 NO ONE HOME, REPEATED CALLS
3 CANNOT LOCATE

4 TRAVEL DATE PAST DUE
5 OTHER TYPE A (SPECIFY) _____

TYPE B (NO TRIPS POSSIBLE)
6 MOVED OUT OF AREA
7 JUNKED—NO REPLACEMENT
8 OUT OF AREA ON TRAVEL DATE

9 ASSIGNED OUT OF AREA
0 OTHER TYPE B (SPECIFY) _____

1. Travel Day _____ Date _____ 5. Garaging Address _____
2. Owner _____ Municipality _____
3. Address _____ 6. Owner's Unit No. _____
4. License No. _____ Make _____ Year _____ 7. Reporter _____ Tel. No. _____
8. Vehicle Type 3 panel or two axle 4 single unit 5 single unit 6 combination
pick-up and single tire dual tire 3 or more axles
9. Starting Address _____ 10. Speedometer Reading
End of Day _____
Beginning of Day _____

[illegible]

The purpose of the Trip Log, on the reverse side, is to aid the person operating the sample vehicle to keep an accurate account of trips made on the travel day. It is recommended that the Trip Log be kept in the sample vehicle during the entire travel day. A travel day begins at 4:00 A.M. and lasts until 4:00 A.M. the next morning.

FOR THE PURPOSE OF THIS TRIP RECORD A TRIP IS DEFINED AS ANY MOVEMENT OF THE SAMPLE VEHICLE THAT IS AT LEAST TWO BLOCKS IN LENGTH. THIS MEANS THAT THE DESTINATION ADDRESS OF A TRIP MUST BE TWO BLOCKS (approximately 0.2 miles) OR MORE FROM THE DESTINATION ADDRESS OF THE LAST TRIP. IN THE CASE OF A SERIES OF TRIPS LESS THAN TWO BLOCKS LONG, THE ADDRESS OF STOPS AT TWO BLOCK INCREMENTS WOULD BE RECORDED AS IF THERE WERE NO STOP BETWEEN THEM. THE INSTRUCTIONS FOR COMPLETING THE TRIP LOG FOLLOWS.

INSTRUCTIONS

Section I

-- Items 1, 2, and 3 are filled out by the interviewer --

- Item 4 - License No., Make, and Year: Enter license number, make, and year - model of sample vehicle.
- Item 5 - Garaging Address: Enter the complete street address, post office, and zone number of the location where the vehicle is normally kept overnight or when it is not in use. If the garaging address is the same as the owner's, write "SAME" in this space.
Municipality: Enter the name of the city, village, or town in which the garaging address is located. Even if the garaging address is the same as the owner's please write in the municipality's name.
- Item 6 - Owners Unit No.: Enter the "FLEET NUMBER" of the sample vehicle if one has been assigned.
- Item 7 - Reporter: Enter the name of the individual who prepared this report.
Tel. No.: Enter the telephone number of the person who prepared this report.
- Item 8 - Vehicle Type: Circle the number next to the description of the sample vehicle covered by this report.
- Item 9 - Starting Address: Enter the street address and municipality of the location of where the first trip of the day started.
- Item 10 - Speedometer Reading: Enter the speedometer reading of the sample vehicle at the beginning and end of the travel day.

Section II

- Col. 1 - Trip No.: Number the trips in succession starting with number 1.
- Col. 2 - Trip Address: Enter the full ~~street~~ address and municipality of the first and each succeeding trip destination. If the exact address is now known a prominent building or nearest street intersection is adequate.
- Col. 3 - Trip Purpose: Enter in this column one of the numbers listed below that best describes the purpose of the trip.

1. Pick-up goods	5. Base of operations
2. Deliver goods	6. Personal business
3. Both pick-up and delivery	7. Service
4. Other work connected business	
- Col. 4 - Type of Establishment at Destination: Describe the type of establishment at the destination end of the trip, for example: grocery store, department store, service station, fabricating plant, house, etc. If it is a store note whether wholesale or retail; if an office or plant, note the kind. If you are not sure of the type of establishment give its name.
- Col. 5 - Time of Trip: Enter the starting and ending time to the minute of each trip. Circle if a.m. or p.m.
- Col. 6 - Principal Commodity Carried (For trucks only): Enter the principal commodity carried on the trip, for example, bread, gasoline, apples, beer, cement, mixed dry goods, etc.

IF IT IS IMPOSSIBLE FOR THE DRIVER OF THE SAMPLE VEHICLE TO TALK TO THE INTERVIEWER IN PERSON WITHIN ONE OR TWO DAYS OF THE TRAVEL DAY THE TRIP LOG MUST BE LEFT WITH SOMEONE (truck's owner, dispatcher, etc.) WHO IS FAMILIAR WITH THE TRUCK (OR TAXI) MOVEMENT ON THE TRAVEL DAY. EVEN IF THE DRIVER IS AVAILABLE THE COMPLETED TRIP LOG SHOULD BE USED DURING THE INTERVIEW.

SOUTHEASTERN WISCONSIN REGIONAL
LAND USE - TRANSPORTATION STUDY
TRUCK AND TAXI REPORT

INTERVIEWER _____

CARD NUMBER 4

1. OWNER _____

2. ADDRESS _____
MUNICIPALITY _____ (COUNTY) _____

3. OWNERS UNIT NUMBER _____ MAKE _____ YEAR _____

4. TRAVEL DAY _____ DATE _____ TELEPHONE NUMBER _____

5. CENSUS TRACT AT GARAGING ADDRESS _____

6. FINAL DISPOSITION CODE _____

7. SAMPLE NUMBER: WEEK _____ DAY _____ LIST NO. _____ LINE NO. _____

8. GARAGING ADDRESS _____
MUNICIPALITY _____ (COUNTY) _____

9. LICENSE NUMBER _____

10. VEHICLE TYPE _____

3. PANEL OR PICK-UP AND TWO AXLE SINGLE TIRE

4. SINGLE UNIT DUAL TIRE

5. SINGLE UNIT 3 OR MORE AXLES

6. COMBINATIONS

8. TAX _____

11. BUSINESS-INDUSTRY OF OWNER _____

12. TOTAL TRIPS REPORTED _____

13. TOTAL MILES TRAVLED ON TRAVEL DAY _____

SECTION II TRIP NUMBER	ORIGIN STREET ADDRESS - CITY, VILLAGE OR TOWN - COUNTY	DESTINATION STREET ADDRESS - CITY, VILLAGE OR TOWN - COUNTY	TRIP PURPOSE FROM TO	LAND USE		TIME		PRINCIPAL COMMODITY CARRIED	
				ORIGIN	DESTINATION	START	ARRIVAL		
						AM PM	AM PM		
						AM PM	AM PM		
						AM PM	AM PM		
						AM PM	AM PM		
						AM PM	AM PM		
						AM PM	AM PM		

TRIP PURPOSE CODES

1. PICK-UP GOODS

2. DELIVER GOODS

3. BOTH PICK-UP AND DELIVERY

4. OTHER WORK CONNECTED BUSINESS

5. BASE OF OPERATIONS

6. PERSONAL BUSINESS

7. SERVICE

SECTION III

CALLS

MADE

APPOINTMENTS

REPORT COMPLETED

DATE

TIME

INITIALS

EDIT

PASS

FAIL

INITIALS

DATE

FOLLOW-UP

ASSIGNED TO

DATE

FOLLOW-UP

EDIT

INITIALS

DATE

CODING CONTROL

STATION

INITIALS

DATE

REMARKS

DAILY REPORT - TRUCK AND TAXI SURVEY

INSTRUCTIONS

This is your daily report for purposes of payment. Complete and return this report to your district office each work day.

COMMENTS

SECTION I	Sample Numbers From Form T5-91	Completed		Incomplete Schedule			Trips Recorded For Completed Schedules	
		Interviews	Non- Interviews	Partly Completed	Not Started			
					Call Made	No Call Made		
	(A)	(B)	(C)	(D)	(E)	(F)	(G)	
1. Work load today								
2. Carry over work								
3. Total								

SECTION II

TOTAL AMOUNT CLAIMED FOR OFFICIAL EXPENSE

1. Speedometer Readings			Rate @ .07 per mile	2. Carfare Claimed Today		3. Telephone Calls					
OUT	IN	TOTAL		Trips	Amount	Number	Amount	Number	Amount	Number	Amount
Total				Total		Total		Total		Total	
Total amount claimed today											

* Itemize all toll calls on reverse side of this card.

5. **CERTIFICATION:**

I certify that I have worked the HOURS, DRIVEN THE MILES AND/OR INCURRED THE OTHER EXPENSES as itemized on official business of the Southeastern Wisconsin Transportation Study.

Signature

Work Date: _____

Name: _____

District: _____

Southeastern Wisconsin Regional Land Use-Transportation Study

For Week of _____

Supervisor

[illegible]

TRUCK AND TAXI
WEEKLY PROGRESS REPORT

For Week Ending _____

TOTALS THIS WEEK

1. Completed schedules _____
- a. completed interviews _____ %
- b. completed non-interviews _____ %

Type A (trips possible) TOTAL _____ %

1. Refusal _____ %
2. No one home _____ %
3. Cannot locate _____ %
4. Travel date past due _____ %
5. Other Type A _____ %

Type B TOTAL _____ %

6. Moved out of area _____ %
7. Junked _____ %
8. Out of area on travel date _____ %
9. Assigned out of area _____ %
0. Other Type B _____ %

2. Schedules comp. first call _____ %

3. Schedules comp. second call _____ %

4. Schedules comp. 3 or more calls _____ %

5. Total trips recorded _____

6. Trips per completed interview _____

7. Trips per completed schedule _____

8. Total of completed interviews and
Type A non-interviews _____9. Trips per total of completed inter-
views and Type A non-interviews _____10. No. of persons assigned to inter-
viewing _____

11. Interviewing man hours _____

12. Schedules comp. per hour _____

13. No. of miles driven - (paid) _____

14. Avg. miles driven per sched. _____

TOTALS TO DATE

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

_____ %

Avg. no. per week to date _____

Total to date _____

Average to date _____

Total to date _____

Average to date _____

Estimated workload _____

% workload completed _____

QUALITY CONTROL REPORT

Truck-Taxi Survey

(See instructions on the back

[illegible]

INSTRUCTIONS

This form will be used to summarize results of the re-check of interviewer's completed schedules. It will be maintained in the District Office in duplicate. The duplicate copy will be sent to the Central Office when twelve re-checks have been completed. It will be reviewed by the District Chief, and should be available for review by members of the Study Staff. See the SEWRPC Truck - Taxi Interview Survey Office Procedure Manual, for detailed instructions on procedure.

Recording Results of Re-check.

PREPARE A SET OF FORM T5-98 IN DUPLICATE FOR EACH INTERVIEWER.

Enter interviewer's name and district in the heading.

Col. A -- Enter in the date of the re-check.

Col. B -- Enter in the sample number of the Truck - Taxi re-check.

Col. C through J -- ENTER IN ONE OF THE ENTRIES INDICATED BELOW:

Col. C Address -- "Is this the correct address?"
(As given on Form T5-50, list of addresses)

Col. D Dear Householder Letter -- "Did you receive a letter before the interviewer called?" Enter YES or NO

Col. E I. D. Card -- "Did the interviewer present his identification card?"
Enter YES or NO

Col. F Conduct -- "Was the interviewer courteous, etc?"
Enter S - Satisfactory or U - Unsatisfactory

Col. G Trips -- Quote the number of trips on the trip logs then ask "Is there something more you'd like to add?" Enter YES or NO

Col. H Delivered Pre-Interview Forms -- "Were Trip Log forms delivered to you personally by the interviewer?" Enter YES or NO

Col. I Comments -- Enter any other comments that might be of assistance in evaluating the interview. If the respondent can verify trip data reported, enter appropriate comments on results, etc.

It is suggested that his record be maintained in a three-ring binder with dividers and tabs with interviewer's names. Additional sheets can be added as needed.

STAFF

Kurt W. Bauer Executive Director

LAND USE-TRANSPORTATION STUDY OFFICE

J. Robert Doughty Study Director
Harlan E. Clinkenbeard. Chief Land Use Planner
Richard B. Sheridan Chief Transportation Planner
Kenneth J. Schlager Chief Systems Engineer
Sheldon W. Sullivan Administrative Officer
James E. Bradley Data Processing Manager
Wade G. Fox Cartography and Design Supervisor

CENTRAL OFFICE

William J. Kockelman Chief Community Assistance Planner
Edgar A. Imhoff Chief Natural Resources Planner
Dallas R. Behnke Planning Illustrator

ACKNOWLEDGMENTS

Special recognition should be given to Mr. Thomas A. Winkel, Planning Engineer, State Highway Commission of Wisconsin and to Mr. Ernest R. Vogel, Highway Engineer, Milwaukee County for preparing the first draft of this report and for making the necessary revisions which reflect changes in procedures that were adopted during the course of the survey.

Department of Urban and Regional Planning
The University of Wisconsin
Madison 6, Wisconsin