

GENERAL SERVICES ADMINISTRATION
Washington, DC 20405

OCE 5460.1
October 1, 2018

GSA ORDER

SUBJECT: GSA Customer/Supplier Surveys

1. Purpose. This Order establishes and communicates new policy regarding the General Services Administration's (GSA) survey initiatives. GSA's Office of Customer Experience (OCE) is responsible for embedding customer-oriented thinking into GSA's daily operations to ensure GSA delivers great customer experiences in addition to great products and services. This Order designates OCE as the official entity responsible for ensuring survey materials distributed to recipients outside of GSA and/or across all of GSA meet agency standards. The observation of this policy will reduce the burden to our customers and promote data transparency into survey results. This will allow GSA to better realize efficiencies around survey administration and standardize survey practices, as measured by OCE across GSA.
2. Background. GSA employees gathering feedback outside of GSA and/or across all of GSA through surveys are representing the agency as a whole. We must apply a consistent approach when collecting feedback in order to provide a more positive, streamlined user experience.
3. Scope and Applicability. This Order applies to all GSA employees and contractors acting on behalf of GSA, subject to the terms of their contracts, to conduct research outside of the agency as well as to conduct surveys broadly across GSA. This Order does not apply to any research being conducted solely on behalf of other agencies (*e.g.*, *Centers of Excellence customers*). This Order does not apply to customer/supplier interviews, user testing, or other forms of qualitative customer research; however, if you have questions or would like support in these areas please contact the [Office of Customer Experience \(OCE\)](#).

This Order applies to the Civilian Board of Contract Appeals (CBCA) only to the extent that the CBCA determines it is consistent with the CBCA's independent authority under the Contract Disputes Act and does not conflict with other CBCA policies or the CBCA mission.

4. Policy. Individuals acting on behalf of GSA must receive approval from the [Office of Customer Experience](#) before conducting externally-facing and/or GSA-wide customer/supplier surveys. The Office of Customer Experience will have up to ten business days from the time of submission to review and approve or disapprove any survey and corresponding communications package. All communications packages will be reviewed by GSA's Office of Strategic Communication (OSC) or representative delegate and may extend beyond the two-week window, dependent on the status of communications content development. Externally-facing research audiences include non-federal employees, Federal employees outside GSA, and GSA suppliers.

a. Customer/supplier survey proposals will be reviewed more expeditiously if the requirements listed below are met:

- (1) Written in [plain language](#).
- (2) Falls under a specific use case (where approval has already been granted).
 - (a) Short, transactional surveys.
 - (b) Annual or one-time surveys.

b. Customer/supplier survey proposals will be automatically returned to the submitter for revisions if any of the following deficiencies are identified with the proposed survey:

- (1) Inaccessible to those with disabilities ([Section 508](#)).
- (2) Need for Paperwork Reduction Act ([PRA](#)) approval is not assessed¹.
- (3) The data to be collected already exists within the agency.
- (4) The target audience has been surveyed within the last quarter.

¹ If PRA approval is needed, content must be provided to OCE at least two weeks prior to Regulatory Secretariat submission.

(5) Does not meet **ALL** customer/supplier survey requirements listed in the appendix.

5. Responsibilities. OCE acts as the ultimate authority within GSA to uphold the integrity of customer/supplier surveys by approving content that is distributed to customers/suppliers.

a. Submitting Party. GSA employees or contractors who issue customer/supplier surveys will request review of their survey package through the submission of an OCE project intake form a minimum of ten business days before the desired distribution date. If PRA approval is needed, content must be provided to OCE at least ten business days prior to Regulatory Secretariat submission².

(1) Requests for survey review shall be submitted through the [OCE Intake Form](#) and must include the following³:

(a) Content to be distributed.

1. Specific survey questions.

2. Response options.

3. Communications package (invitation emails, reminders, and thank you messages).

(2) Contact list (including a summary with the total number of contacts and general demographic description).

(3) Brief justification of project.

(a) Purpose of customer/supplier survey.

(b) Description of how data will be used.

(c) Explanation of how this information will differ from existing data sources.

(4) Desired start and end dates.

² Please allow a minimum of one month's time after clearance from OCE for FAST Track PRA approval.

³ Additional instructions can be found in the [OCE Intake Form](#).

b. Office of Customer Experience.

(1) The Office of Customer Experience must approve all surveys reaching external audiences or the entirety of GSA. OCE is available to consult on survey design. Each Submitting Party must provide OCE:

(a) An initial draft of questions must be provided to OCE.

(b) The information your customer/supplier survey is intended to collect must be clearly stated.

(2) Divisional Reviewers within an office may be designated by OCE, and utilized in the approval process. Responsibilities include maintaining project plans, checking basic requirements, ensuring survey standards are met, and including OCE in the communication processes (at customerfeedback@gsa.gov).

c. Office of Strategic Communication. OSC will review survey communication plans for those surveys to be sent to more than 5,000 non-GSA contacts to ensure alignment with agency goals and priorities, and to provide guidance on plain language usage and communication strategies.

6. Signature.

/S/ _____
Anahita Reilly
Chief Customer Officer
Office of Customer Experience

Appendix A. Specific Requirements for Customer Surveys

1. Specific requirements for customer surveys.

a. Policy.

(1) As with all externally-facing customer research projects, [Paperwork Reduction Act](#) approval must be obtained for any survey sent to 10 or more individuals (who work outside the Federal Government). The full text of the Paperwork Reduction Act statement must be inserted, along with a GSA privacy statement, as a PDF in the footer of the survey. Full instructions can be found in the Survey User Guide in the resources section of this document.

(2) [Section 508](#) is an amendment to the United States Workforce Rehabilitation Act of 1973 mandating that all electronic and information technology used by the Federal Government be accessible to people with disabilities.

b. Survey communications and branding.

(1) Special care must be given to question development to ensure:

(a) The desired data is collected, and

(b) Questions do not introduce bias into participants' responses.

(2) All external surveys will be conducted through Qualtrics unless express consent is obtained from the Office of Customer Experience to use an alternative platform. This will offer a consistent, professional face for GSA surveys.

(3) The GSA theme must be used for all Qualtrics surveys unless a legitimate business reason is provided for the development of a unique theme (e.g., USAGov).

(4) When sending survey invitations and reminder emails, an [opt out option](#) must always be present.

(5) Targeted, individualized reminder emails or post-survey follow ups must never be sent without the customer's consent (e.g., soliciting additional feedback from dissatisfied customers unless they indicate that they are willing to be contacted regarding their responses).

c. Survey methodology.

(1) When using a Likert scale, options must range from negative to positive reading left to right. For example, “Very dissatisfied” to “Very satisfied.” This approach is important for establishing consistency and setting expectations for customers taking GSA surveys.

(2) Transactional surveys (excluding post-event surveys) must be no longer than 6 questions. Annual or one time surveys must be no more than 25 questions. If you have a legitimate business need to exceed these limits please submit the rationale to the [Office of Customer Experience](#) with the submission package.

(3) All surveys must provide a [retake survey option](#) within the survey either in the survey footer or in the “Thank You” message.

(4) The [back button option](#) must be enabled unless you need to prevent customers from amending their previous responses throughout the survey flow.

(5) Emails must be sent “from” an email within the @research.gsa.gov subdomain. Request a new, shared inbox in this subdomain through Service Now or request to use OCE’s surveys@research.gsa.gov.

d. Data sharing practices.

(1) When sharing data with stakeholder groups, personally identifiable information must be omitted from individual responses. If you have a legitimate business need to deviate from this policy and collect personally identifiable information, please submit the justification via email to the [Office of Customer Experience](#) (customerresearch@gsa.gov) with the submission package.

(2) Unless there is sensitive information in your dataset that cannot be removed without changing the underlying results (e.g., Personally Identifiable Information (PII)), survey data should be posted to the Data to Decisions (D2D) platform.

2. Records management for customer/supplier research. Surveys and response records must be kept for six years per the [National Archives and Records Administration policy](#).

3. Resources.

- a. [Survey User Guide](#)
- b. [Paperwork Reduction Act InSite Page](#)
- c. [Section 508 Webpage](#)
- d. [Plain Language Webpage](#)
- e. [Qualtrics Support Pages](#)