**Bag Tax Evaluation: Data Collection and Entry Instructions**

**Data Collection**

1. **Safety first.** These are retail stores and you’re going at times with a lot of shoppers, so we don’t anticipate anything happening that would compromise your safety. But, as always, please beware of your surroundings and be safe. Safety extends to bad weather events, like massive rainfall or icy road conditions.
2. Before heading out to your assigned stores, make sure you have enough paper forms with you to collect data.
3. Travel to the store. Take your car, public transit, Uber or Lyft and save your receipts if your organization will be reimbursing you.
4. Many stores have a bench or some other waiting area near the exit or close to the cashiers. Go to that location. If a store has two exits, try to pick the one with the most traffic.
5. Record the store name and location, date, and the time you’re visiting the store.
6. Each row on the form is for a separate shopper. Please estimate how many reusable bags and how many disposable bags each shopper uses. If a person has 3 reusable bags but needs 1 paper bag; record 3 reusable and 1 disposable. Do not include plastic bags for fruits or veggies, or paper bags for bottles, as these are generally not covered by bag taxes. If possible, count double-bags as 2 bags.
   1. Disposable bags: Any paper or plastic bags that are acquired from the retailer at check-out
   2. Reusable bags: Any bags that are brought from home, or heavy-duty tote bags purchased from the retailer at check-out.
      1. Example: If you see a plastic Target bag used at a Jewel Osco, consider this reusable.
      2. Example: If someone uses his/her backpack for groceries, it’s a reusable bag.
   3. No bag: Someone doesn’t bring a bag, or uses a cardboard box.
7. For shoppers who use reusable bags for some items, but leave others outside of bags, record the number of reusable bags used and make a note that they did not use a bag for all items. Prioritize quality (e.g. make sure you are collecting accurate counts) over quantity (e.g. make sure you don’t miss anyone).
8. **Record your data at a distance. Do not interfere with a shopper’s experience.** **Do not stop shoppers just to count their bags. Do not interview them. Just observe.**
9. For attempts at classifying by race and sex, these statistics are used to check if the people shopping in the store are representative of the neighborhood demographics. Try your best, but we recognize that these are imprecise and difficult.
   1. What if a mixed race/mixed gender couple is shopping together? How do I record the data?
      1. Record the one who is pushing the shopping cart.
   2. What if male and female, and a large age disparity?
      1. Record older person (parent of college-aged student, example)
10. **100 shoppers or time limit.** You should move on to the next store when either (1) you collect data on 100 shoppers, or (2) you reach the allotted time, whichever occurs first. Once you count 100 shoppers, proceed to the next store. If you reach 40 minutes and you’re not at 100 shoppers, and you are using a ride share service, you can request a car and then finish counting while you wait for the driver to come. For the final store of the day, record travel time back to your organization/home.
11. **Helpful tip: bring a phone charger and headphones.** Many prior volunteers found it useful to wear headphones while collecting data.
12. **Store managers or employees:** On rare occasions, an employee or manager will ask what you’re doing. Be honest with them and use the talking points below. If the store manager would like you to leave, then please respect their wishes and move on to the next store.

**Data Entry**

1. Once data collection is complete, enter the data in the Excel form provided to you.
2. Once data has been entered, completed Excel forms should be sent to your designated contact. Paper copies should also be turned in, in the event that there are any data quality issues that need to verified.

If you need anything, please give us a call, text, or email.

**Useful Talking Points**

* Why are you here?
  + **[Provide relevant answer]**
* What type of data are you collecting?
  + **We’re simply counting the number of reusable bags and the number of disposable bags people use as they shop.**
* Why are you collecting this data?
  + **We’re interested to learn about the impact of the [provide information on bag tax being evaluated].**
* I’m not comfortable with you collecting my information. Can you remove it?
  + **No problem.** *[Cross off the line for that shopper.]*
* Will the store be identified in any research?
  + **No. The data will be combined with several stores in the area.**
* Is this data going to be made public?
  + **The individual data points will not be publicly available.**