Standing on the Outside, Looking In: Tapping Data Users to Compare and Review Surveys

Leda Kydoniefs, *Bureau of Labor Statistics*

Linda L. Stinson, *Bureau of Labor Statistics*

U.S. Bureau of Labor Statistics
2 Massachusetts Ave., NE
Washington, DC 20212

telephone: 202-606-7523   FAX: 202-606-7426
Kydoniefs_L@BLS.gov

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1.0 Introduction

It is not unusual for survey organizations to conduct periodic expert review of ongoing survey programs; neither is it unusual for those involved in such a review to include behavioral scientists. In fact, most behavioral scientists would agree that such an expert review would naturally include an examination of the sample design, definitions of data elements, question wording, data collection procedures, as well as publication criteria. The question arises, however, is there another way to conduct such a review? What if the focus of the evaluation was redirected? That is to say, what if attention was placed not solely on the substantive and methodological content of the surveys, but was also turned toward the individuals, organizations, and establishments who use the resulting data? What could be gained from such an endeavor? Would the information gained from data users substantially add to the knowledge we already have from the "typical" internal review conducted by content specialists and survey research experts?

A project recently emerged at the Bureau of Labor Statistics that provided us with an opportunity to consider such an approach. Two surveys were undergoing programmatic review and evaluation by the typical players: program office staff, office of field operations, office of publication, and survey methodologists. The surveys bore certain similarities in that they were both establishment-based, wage-related surveys. Our part of the project was to ask the more fundamental evaluation question: "*What do data users really want?*" Protocols were developed for a series of discussion groups and debriefing interviews of survey program office staff, regional staff and survey users. Survey similarities permitted the use of the same protocols for users and staff of both surveys. Questions were posed to identify the data users' needs and understand their motivations for using one survey or the other. In this way, it was hoped that fresh insights into the fundamental differences between the two surveys would emerge by casting light into the applications of the data.

This paper presents the methodological and implementation decisions faced when designing such an evaluation study. In particular, we examine the various methodological approaches one could follow when pursuing answers to the multiple questions implied by the over-arching question, "What do data users really want?" We also consider which methodological approach provides us with the most extensive information about survey users given the limited time and resources available for this project. Finally, we will also include our preliminary assessment of the effectiveness of the overall approach -- that of contacting users of survey data-- and consider what new knowledge is added to that already known by the two BLS survey programs.

2.0 Design and Methodology

The Office of Employment and Unemployment Statistics (OEUS) and the Office of Compensation and Working Conditions (OCWC) along with the Office of Field Operations (OFO) and the Office of Survey Methods Research (OSMR), at the request of the Commissioner of Labor Statistics, formed a team in October 1999, to determine the most effective and efficient relationship between two programs collecting wage and compensation data. The two programs were the Occupational Employment Survey (OES) a part of OEUS, and the National Compensation Survey (NCS), a part of OCWC. One of the specific tasks agreed upon by the team was to form a "Users' Needs Assessment" sub-team to assess the needs and desires of data users for occupational wage and compensation data. Once reasonable user needs are identified that can be satisfied given existing resources, upper management would decide what (if any) programmatic changes will need to be implemented in the two programs. The ideal outcome would be for the two programs to collect data and produce final outputs that are as seamless as possible from the perspective of data providers and data users.

2.1 Planning the Evaluation

The first task of the sub team was to design the scope of the evaluation -- identify what to evaluate, how to go about it, whom to interview etc. The evaluation was to be built around access to two groups of subjects. One group would include BLS staff who worked on the two surveys either in the national, regional offices, or State offices and had access to users of BLS data. The other group would consist of various direct users of the BLS survey data. A sampling mechanism of some sort needed to be developed, as of course, did the nature and scope of the questions to be posed to these groups of subjects, and the method by which the data would be collected. The work of the project was thus further divided into four broad decision points:

<u>Defining our Terms</u>: Significant time was spent, as with all evaluation projects of this sort, in teasing out exactly what was meant by the question "what do data users really want?" Were we to conduct some sort of customer satisfaction survey to find out if users like what we provide? Or is the better question that should be asked -- what would users want in such a survey independent of what we provide? The first question would ask users to evaluate what we have, the second would ask users

their needs independent of the current surveys. We decided to develop a overall research protocol that would hopefully yield a combination of the two types of answers.

Defining The Sample: Now that we had an idea of the goal of our endeavor, we needed to identify our sample. The difficulty we faced was not in collecting information from our own regional staff and State partners. Both these groups were easily defined and well known to us. We felt that meeting with the 2 national program office staff, 4 regional and 4 state offices would suffice to give us an overview of the kind of requests received from users. The difficulty lay in defining/identifying the sample of users, that is what lists to use in developing the sample of users – lists of current users, past users (what constitutes past in surveys that are in flux) and what about the 'non users', should they not be contacted? We addressed this task by running a brainstorming session with the entire sub team. One of the behavioral researchers acted as facilitator of the group and kept the members on task. The brainstorming session was quite successful in identifying who, in theory, are the users of the two surveys, what mechanism they typically use to ask their questions (phone, Internet, email, in person etc.), to whom do we market the data we produce and, given the future direction of the two programs, would it be more useful to contact current, past users, or potential users – individuals who don't necessarily currently use these BLS products. Once we were comfortable with having identified the user lists, we had to decide how many users would be enough to contact given our time frame and resources. Naturally, the method of data collection would, in large part, define the upper limit of our users sample size (Kuzel, 1992).

How to Collect The Data: The decision of how to collect the data can best be made after you know the general kinds of questions you want to ask, whether you will be asking people's opinion or hoping that a group discussion will reveal a richer data output (Merton, Fiske,and Kendall, 1990). We considered all three possible methods : mail, telephone, and in-person discussions. Mail was immediately dropped from consideration due to the additional time that would be required for mailing, follow-up, and final receipt. Reaching BLS staff working at the national office was easy -- we met with them in two in-person groups, one group per survey program office. Regional staff and State staff were located in different parts of the country so, for efficiency, we decided to conduct small, one – three person group discussions via the telephone. The staff in each office were all located in a single room and the researcher at the national office posed the questions via telephone which were audiotaped. We found such a discussion fairly easy to conduct, though it requires additional vigilance and plenty of reminders for staff to speak up, that nods of head cannot be heard over the telephone etc. Project staff considered having direct, in-person access with data users to be of great importance, although methodologically, there appeared to be no such need as the questions developed for the users were of a content/format easily asked over the phone in one-to-one sessions. Nonetheless, all users were invited to attend roundtable discussion groups at the BLS national office.

Choosing the Data Display and Designing the User Group Discussion Protocol As mentioned earlier, the two programs (OES and NCS) under programmatic review are both establishment-based, wage-related surveys. Users who call requesting data do not necessarily ask for a particular survey's data – they may simply call and request for example, the current entry-level wages for architects in a given geographic location. As the goal of this project was to evaluate what users want, choosing the best mechanism to combine and prepare the BLS data for the users' review and evaluation during these roundtable discussions became critical. Should all related wage data be collapsed into one seamless format, or would it be best to present the two sets of program survey data separately? This task of determining how best to "sort and organize the data for presentation is a common problem in qualitative research (Wolcott, 1990) and one we struggled with repeatedly. The display of the data would drive the specific questions to be asked of the users and the kind of dialog we could have during the meetings. We had earlier made the decision we were interested in both what users want independently from what BLS provides, yet we were also interested in obtaining an evaluation of the usefulness of the data currently provided. Ultimately, the data display package developed and sent to users for review prior to the roundtable discussions presented data separately by program. Not a particularly surprising decision for a federal agency used to publishing data by survey program.

2.2 What We Did

Debriefing of BLS and State staff: We met with national BLS staff who answer user requests of both surveys NCS and OES in two separate debriefing sessions, and spoke with regional staff for NCS and State staff for OES in telephone debriefing sessions. State offices that collect OES data via a cooperative agreement with BLS were approached, and staff in each office with experience in answering telephone user calls/requests was solicited. We were especially interested to see if there were differences in the nature of requests posed to the national BLS office versus requests that might be posed to regional or our State partners. Each debriefing phone call was approximately two hours in duration as were the in-person roundtable discussion groups. All were asked the same series of questions presented in identical order. The topical questions posed to all staff and end users are presented on the next page. Each question tended to have multiple follow-up probes which are not listed in this paper due to space concerns.

Debriefing of NCS and OES Users: A total of 21 users attended one of four group roundtable discussions. Some users were local working within the greater metropolitan DC area, others were flown in from the northeast corridor. The users represented one of six specialties: compensation specialists, economic and business researchers, unions, trade/professional associations, and educational training specialists. They were solicited from the recent (within the past 12 months) logs of NCS and OES users – i.e., individuals who called to request some particular OES or NCS data or product. Lists of possible respondents were also obtained from the Labor Research Advisory Committee, the Business Research Advisory Committee, American Compensation Conference attendance, and presidents of Education Training profession associations.

The identified respondents were contacted via telephone and their participation solicited. Upon consenting to participate in the study, respondents were sent the NCS/OES program data display materials for review prior to the group discussion. As stated earlier, these materials were designed to be the vehicle for discussion and participants were highly encouraged to spend some time reviewing them. The materials represented certain carefully chosen tables of data from each of the NCS and OES surveys along with questions for consideration. These questions are presented below along with the questions posed to the BLS national, regional and State staff. Each user group discussion was approximately 2 hours in duration and was parallel in format.

Though the questions for the two groups (left vs. right side of table) appear to be quite different, they share certain essential characteristics: They both ask 1) where do users go to get the wage data they need; 2) What specifically do they use of BLS wage-related data; and 3) Are there any missing data gaps- wage data they would like to have and cannot get. The users are asked these questions directly; the BLS and State staff are asked an indirect question: what do they think data users want/would answer if asked these questions.

Topics for Discussion of National, Regional BLS Staff and State Staff	**Topics for Discussion of Users of BLS Data**
Describe a typical call; what is a typical scenario?	What types of (general) data do you use, where do they come from, and how important are they to you?
Why are users calling?	Are there any data you would like to have and cannot get?
Do you ever send them elsewhere, and if so, where and for what?	Which BLS data do you use in your work, how useful is it, and how much do you use it?
What do you personally give to the user?	How much occupational detail do you need in the wage data you use?
How well do you think customers needs are being met?	How much industry detail do you need in the wage data you use?
Do you have any ideas how the process of meeting users requests might be improved?	How much geographic detail do you need in the wage data you use?
Are there existing data elements that people never seem to ask for?	What is your level of interest in benefits data?
If you received a request for a wage of a particular occupation which survey (NCS, OES) would you use and why?	What changes can BLS make to its wage products to enhance their usefulness?

In conducting this evaluation project, we became interested in ascertaining which methodological approach (programmatic review by survey program and BLS staff, or direct contact with users) would provide us with the most extensive information about survey users given the limited time and resources available for this project. Further, given the way the project evolved, we were also able to observe whether there were differences in the quality and extent of data collected by discussion method: via in-person groups or telephone debriefings. Naturally, in-person user discussion groups have far greater resource costs associated with them – from the need to schedule specific session dates, send letters of authorization, fed ex materials for the discussion groups, schedule conference rooms, and all sorts of related travel and hotel costs. On the other hand, in-person discussion groups carry a certain face validity that can go a long way towards the successful closure and ultimate acceptance of an evaluation project. Furthermore, if one can afford to conduct both types of interviews – of BLS staff as well as users, one could bolster the validity of the project by "data triangulation"…in our case, the use of multiple sources of data collection (discussion groups and individual interviews) to see whether they corroborate one another (Silverman, 1993)

III. Findings

By and large, all the national, regional, and state office staff presented a similar picture of OES and NCS surveys and related user needs. That is quite reassuring when, in assessing user needs, you are able to sample only a few regions and States and harbor concerns that you may not be seeing or hearing the "whole picture". There appeared to be no differences across regions, nor were there observed differences in the quantity of ideas, examples, and data collected by an in-person method (national office staff) versus the telephone debriefings of the regional and State staff. All groups lasted approximately 2 hours, and staff took turns adding to each others ideas. It appeared that not being in one room together had no adverse impact to the discussion.

The users as a group, presented a picture of their use of the BLS wage data and their wage-related needs that was surprisingly consistent with that reported by BLS staff. Careful analysis of points made by users revealed no significant differences between that known by BLS staff who have direct and ongoing access to the users, and the users themselves. Naturally, users made their various points with all the force of their conviction and thus their needs were very easy to "hear". But the points themselves were the same as the BLS staff who spoke in terms of "I think users want x, y…" "I hear users asking about this point or that point…" "I believe that users would prefer if BLS did this and such…"

If the central aim of this evaluation project was to obtain confirmation (data triangulation) of the accuracy of BLS knowledge of the needs of the users, then the project was a rousing success. BLS staff do in fact know a lot about the BLS users, and are able to report accurately on that knowledge. If, however, the aim of the project was to evaluate the most efficient mechanism to conduct such a programmatic review, then we learned something new. Perhaps others may say we simply confirmed the obvious: When you have highly skilled and motivated in-house staff, trust their knowledge -- they know what's going on "out there". The most significant gain we could observe from the expending additional resources to contact users directly and bring them in for in-person roundtable discussions is one of certainty. There can be no doubt about what users want if you ask them directly. Sometimes, such a need for certainty is extremely important and if that is so, then the additional time needed to obtain the such data can be worthwhile.

Finally, for those who absolutely have to know what it is the BLS staff and data users said of the BLS wage data, we offer the following summary points:

- Users want more data, although their needs vary. Some cited a desire for more detailed occupations, greater geographic specificity, and more timely data. Naturally, they use whatever is available to them – i.e., there seems to be no place else they can go to fill data gaps though some organizations conduct some small highly specialized surveys for their constituent groups.
- Users knowledgeable of the NCS and OES surveys found it confusing sometimes to know which survey best provides the data elements they need and how the two surveys differ
- Users find the BLS data generally less accessible than they could be and requested a reorganization the BLS Internet to simplify their data searches
- Users would like the BLS to be more proactive in informing them of changes (current and expected) to their surveys
- Users would like more detailed explanations of the methodology, sampling, variances and generally the technical aspects of the BLS wage surveys

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