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Introduction

It is not unusual for survey organizations to conduct periodic expert reviews of ongoing survey programs; neither is it unusual to reach beyond the program staff and include behavioral scientists in such reviews. An expert review of this type would generally include an examination of the sample design, definitions of data elements, question wording, data collection procedures, and the criteria for publication. The question arises, however, are there other ways to conduct such a review? What if the focus of the evaluation were redirected? That is to say, what if attention was placed not solely on the substantive and methodological content of the surveys, but was also focused upon the various individuals and organizations who use the resulting data? What could be learned from such an endeavor? Would the information gathered from data users substantially add to the knowledge already obtained from the "typical" internal review conducted by content specialists, survey research experts and behavioral scientists?

A project recently emerged at the Bureau of Labor Statistics (BLS) that provided us with an opportunity to consider such an approach. In October of 1999, the BLS Offices of Employment and Unemployment Statistics (OEUS), Compensation and Working Conditions (OCWC), Field Operations (OFO), and Survey Methods Research (OSMR) formed a team to conduct an evaluation study. In particular, we examine the implementation decisions faced when designing such surveys. The goal of the project was to address the fundamental question, "What do data users want?" We also consider which of the two methodological approaches (i.e., talking with data users themselves versus talking with program staff who serve data users) provided us with the most extensive information about survey users needs given the limited time and resources typically available for such a project. Finally, we also include our preliminary assessment of the overall effectiveness of contacting users of survey data directly and consider what type of new knowledge this adds.

Design and Methods

The first task of the team was to design the scope of the evaluation. We needed to identify (1) what to evaluate, (2) how to go about it, and (3) whom to interview. The evaluation was to be built around access to two different groups of subjects. One group included BLS staff who worked on the two surveys programs either in the national or regional offices and state offices that provided technical assistance to OES data users by telephone. The other group consisted of actual users of the BLS survey data.

Other tasks the team faced included developing some sort of sampling mechanism for selecting data users, defining 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 divided into four broad decision activities.

1. Defining our Terms

As with all evaluation projects of this sort, significant time was spent in teasing out exactly what was meant by the question, "What do data users really want?" One approach that could be taken would be to conduct some sort of customer satisfaction survey to find out if users like what is currently provided and to identify their sources of dissatisfaction. Another approach would be to simply ask data users what they want in terms of occupation and wage data apart from what exists in actuality. The first question would ask users to evaluate the survey products that currently...
2. Developing the Lists of Participants

Once we defined the goal of our endeavor, we needed to develop a frame for selecting participants. Of course there was no difficulty in collecting information from our own BLS staff or our State partners. Both these groups were easily defined and well known to us. We felt that meeting with staff from the 2 survey programs within the national office, 4 regional offices, and 4 state offices would suffice to give us an overview of the kind of requests received from users. The real difficulty lay in identifying list frames of known data users. Not only did we need to search out existing lists, but there were a number of decisions to be made in regard to those lists:

- What constitutes data “use?” Who exactly is a data user?
- Should we only talk with “current” users?
- How should we define a “current” user?
- What are the different types of users that we should consider (e.g., academics, unions, nonprofit and for-profit organizations etc.)?

We addressed these questions by conducting a brainstorming session with the entire team with one of the survey methodologists serving as a facilitator for the group. This brainstorming session was quite successful in identifying (a) various categories of data users for the two surveys, (b) different modes of access (e.g., telephone, internet, e-mail, personal visits etc.) data users employ when asking questions or presenting their problems, (c) populations to whom we typically market our occupational wage data, (d) general advantages or disadvantages associated with contacting current, past, or potentials users, and (e) available lists of known data users.

Once we were comfortable with the lists of users we identified, we then had to decide how many users would be enough to contact given our time frame and resources. Naturally, the method of data collection and our own time frames, in large part, determined the number of people we could include in the study (Kuzel, 1992, pp. 31-44).

4. Designing Discussion Guides and Other Materials

As previously mentioned, the two survey programs under programmatic review (OES and NCS) are both establishment-based, occupation and wage surveys. Users who call in requesting data do not necessarily ask for a particular survey’s data. In many cases, they may simply request, for example, the current entry-level wages for architects in a given geographic location. Consequently, we were unsure how familiar our roundtable discussion participants would be with the full data produced by the two surveys or even the survey names. We were also unsure whether it would be conceptually easier for our discussants to grasp the content of the survey products if we collapsed all the related wage data into one seamless format based on the content or whether it would be best to present the two sets of data separately as individual surveys.

We decided to present the BLS wage data to be discussed in a data display binder. The purpose of the binder was to introduce and summarize the selected wage information and serve as a springboard for discussions. The task of determining how best to sort and organize this type of information is a common problem in qualitative research and we took this task.
very seriously (see Wolcott, 1990 for a good
discussion of these issues, pp. 32-35). Since the
packaging and presentation of the wage data to be
discussed by participants would ultimately drive the
specific questions to be asked of them, it would also
determine the scope and quality of the dialogue that
would emerge during the meetings. When the data
display binder was finally designed, the decision was
made to present the data separately by survey program.
We decided that this was the best option since we had
generated no strong cognitive argument against this
procedure and it was consistent with the way the data
are published and distributed.

As mentioned previously, we made the decision
that we wanted to identify the data products from the
currently existing pool of BLS products (displayed in
the data binder) that our participants routinely used.
We also wanted to obtain an evaluation of the
usefulness of those data products for meeting their
analytic goals. Yet we wanted to go beyond even that
assessment, in order to find out what types of data
elements they might like to have in addition to those
currently produced.

Overview of the Debriefing Interviews with BLS
and State Staff

The first debriefing interviews were two separate
groups sessions held with the BLS national office staff
who answer user requests for both of the surveys. In a
series of telephone debriefing sessions, we then spoke
with BLS regional staff who answer user requests for
the NCS and state staff who respond to requests for the
OES. We went to the state offices because they collect
OES data via a cooperative agreement with BLS. We
were especially interested to see if there were
differences in the nature of requests posed to the BLS
national office staff versus requests that might be posed
to regional staff or our state partners. Each debriefing
phone call was approximately two hours in duration, as
were the two in-person debriefing sessions with the
national office program staff. All participants were
asked the same series of questions presented in
identical order. Each question tended to have multiple
follow-up probes, but the general questions were:

• What is a typical scenario? Describe a typical call.
• Why are users calling? What are the different
  things they are requesting?
• Do you ever have to forward the calls elsewhere?
  If so, where do you send them and for what
  additional information?
• What products and services do you provide to
  users?
• In your opinion, how well do you think customers’
  needs are being met by the currently existing data
  products and distribution systems?

• What ideas do you have about how the process of
  meeting users’ data needs might be improved?
• Are there existing data elements that people never
  seem to ask for?
• If a data user requested a specific occupation’s
  mean wage, to which survey (NCS or OES) would
  you turn and why?

Overview of the Roundtable Discussions with Data
Users

A total of 21 users attended one of four group
roundtable discussions. Some users were local
professionals working within the greater metropolitan
Washington, D.C. area, while others were flown in
from the northeast corridor. The users represented one
of five specialty areas: (1) compensation specialists,
(2) economic researchers, (3) unions, (4) members of
trade/professional associations, or (5) educational
training specialists. Some of the participants were
solicited from the recent NCS and OES logs of users
who had called within the past 12 months to request
some particular data product. Lists of possible
respondents were also obtained from the BLS Labor
Research Advisory Committee, the BLS Business
Research Advisory Committee, attendees at a recent
American Compensation Conference, and presidents of
various Education/Training professional associations.

The roundtable participants were contacted by
telephone and their participation solicited. Upon
consenting to participate in the study, participants were
sent the data display binder of 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 reflection
questions for their consideration. Each user group
discussion was designed to last approximately 2 hours.
The discussion questions included the following:

• What types of overall economic data do you use?
  Where do you get them? How important are they
to your work?
• Which BLS data do you use in your work? How
  useful are they? How much do you use BLS data?
• What occupational wage information would you
  like to have, but cannot currently get?
• How much occupational detail do you need in your
  wage data? How much industrial detail? How
  much geographic detail?
• What changes could BLS make to currently
  existing wage products to enhance their
  usefulness?
• How much interest do you have in benefits data?
While the questions used for the debriefing interviews and roundtable discussions appear at first glance to be quite different, they do share certain essential characteristics. Essentially they both gained the following information:

1) Where do users go to get the wage data they need?

2) What do users do with BLS occupational wage data when they get it?

3) Are there any missing data elements that users would like to have and cannot currently obtain?

The essential difference was that users were asked these questions directly while the BLS and state staff were asked the indirect question, "what do you think data users want?" In other words, what have users been asking you for and how do you think data users would answer if asked this question?

Discussion

During the course of this evaluation project, we became interested in assessing which methodological approach (i.e., a debriefing of BLS and state staff or direct dialogue with users) provided us with the most extensive information about survey users. Given the way the project evolved, we were also able to observe whether there were substantial differences in the quality or quantity of data collected by the different discussion methods (i.e., in-person discussion groups versus telephone debriefings).

We were also interested in the question of whether or not any additional findings that could be gained by talking directly with users would be worth the additional costs of time and money if these resources were limited. On the one hand, the in-person discussion groups with data users clearly had far greater costs associated with them than any amount of debriefings with our own staff. These costs were associated with the labor-intensive tasks of scheduling individuals for specific session dates, sending letters of invitation and instruction, transmitting the binder of materials for the discussion groups, scheduling conference rooms and providing the usual amenities, as well as the various and sundry costs related to travel and hotel arrangements. On the other hand, in-person discussion groups do carry the kind of face validity that can go a long way towards bringing a project to a successful conclusion and, ultimately, paving the way for an acceptance of the evaluation results. Furthermore, if one can afford to conduct more than one type of interview (e.g., with staff and data users), there may be an opportunity to bolster the validity of the project by "data triangulation." In our own particular case, the multiple sources of information corroborated one another. But in other cases, using multiple sources of information may uncover new and unforeseen differences that need to be understood and investigated further (Silverman, 1993, pp. 144-170).

By and large, all our debriefing interviews (both telephone and in-person) conducted with the national, regional, and state office staff presented very similar pictures of user needs for the OES and NCS data. This was quite reassuring in our assessment since we were only able to sample a few states and regions and harbored concerns that we might not be seeing or hearing the "whole picture." After transcribing the debriefing interviews and identifying the information that was gathered in each particular debriefing, we concluded that there appeared to be no substantive differences in the information across regions nor between the national and regional staff. There were also no differences identified in the quantity or quality of ideas, examples, or descriptions collected by an in-person method used with the national office staff versus the telephone debriefings conducted with the regional and state staff. We essentially heard the same things in each of our debriefing sessions.

The data users participating in our roundtable discussions presented a picture of their use of BLS wage data and their other data needs that was surprisingly consistent with that reported by BLS staff. Careful analysis of the points made by data users themselves revealed no significant differences from the information reported to us by BLS staff who have direct and ongoing access to data users. Naturally, users made their various points with the force of personal conviction and thus their needs were very easy to hear. But the points themselves were the same as those made by the BLS staff who couched their knowledge in less forceful terms (e.g., “I think users want...” “I hear users asking about...” “I believe that users would prefer it if BLS did...”).

Conclusion

If the central aim of this evaluation project was to obtain confirmation or triangulation of the accuracy of the information reported by BLS staff about the needs of data users, then the project was a rousing success. Taken together, the two methods of data collection clearly showed that BLS staff do, in fact, know a great deal about our data users and are able to synthesize what they know and convey it accurately. Perhaps others may say we simply confirmed the obvious, but we discovered that when you have highly skilled and motivated in-house staff, time and money may be saved by trusting their knowledge. They do know what’s going on “out there.”

By talking with the members of the BLS staff about their common task of serving data users, we...
discovered a need for and ways to provide increased communication between the program offices. We also gained insights into new ways of cross-training the staff from the two surveys, so that they are more aware of both survey programs.

By talking directly with data users, we also learned a great deal about how to make our technical and explanatory materials more user-friendly and accessible to the public. In particular, we learned about preferences for media formats and modes of data dissemination. We also gained a better understanding of how to notify data users about programmatic changes.

However, the most significant gain we obtained from expending the additional resources to contact data users directly and bring them in for in-person roundtable discussions was that of certainty. There can be no doubt about what users want if you ask them directly and they answer truthfully. Sometimes, this need for certainty is important and, if that is the case, then the additional time and money needed to obtain it will be well spent.

Notes
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References


