TAPPING DATA USERS TO COMPARE AND REVIEW SURVEYS

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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 determine the most effective and efficient way to understand the needs of data users for occupational wage data.[1] The two BLS programs producing these data are the Occupational Employment Survey (OES), a part of OEUS, and the National Compensation Survey (NCS), a part of OCWC.

These surveys have certain similarities in that they are both establishment-based, occupational wage surveys. The goal of the project was to address the fundamental question, *"What do data users really want in terms of occupational wage data?"* To answer this basic question, protocols were developed for a series of (1) <u>debriefing interviews</u> with survey program office, regional office, and state staff to identify the data requests they routinely receive and the types of assistance they are called upon to provide to data users and (2) <u>roundtable discussions</u> with survey data users themselves to identify specific ways they use the survey results and their motivations for choosing 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 onto 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 myriad of questions contained within the over-arching 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 exist; the second question would ask users about their needs for data independent of the current surveys. We decided to develop an integrated research protocol that would, hopefully, yield a combination of the two types of answers.

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, non-profit 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).

3. Deciding How to Collect the Data

Typically the decision of how to collect data can best be made after you know the general kinds of questions you want to ask and after you determine whether you will be simply asking for people's opinions or hoping that a group discussion can reveal a richer insight into the issues and processes involved (Merton, Fiske, and Kendall, 1990, pp. 141-147). We considered three possible data collections methods: mail survey, telephone interview, and group discussions. The mail survey option was immediately dropped from consideration due to the amount of additional time that would be required for mail-outs, non-response follow-up, and data entry.

Since locating BLS staff working at the national office would be easy, for the sake of efficiency, these program office staff were interviewed in-person in two small group sessions. Since it would also be fairly easy to place telephone calls to regional and State staff located in different parts of the country, we decided to conduct telephone interviews with small groups of 2-3 people. In each case, the staff were all located in a single room and the researcher at the national office posed the questions via telephone, audiotaping the responses. We found these discussions reasonably simple to conduct via telephone, although it required additional vigilance and plenty of reminders for staff to speak loudly, since nods of the head and mumbling cannot be heard over the telephone.

Early in the design process, the team decided that talking with data users in-person was of great importance. The questions developed for the data users were of a content and style that could have been easily asked over the telephone in one-on-one interviews. However, in order to facilitate more of an "open dialogue" on both global and specific data issues, as opposed to a simple "debriefing on data use," we invited users to attend roundtable discussion groups at the BLS national office.

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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