

MEETING THE NEEDS OF THE CASUAL USER¹

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INTRODUCTION

The Census Bureau LEHD Program management team, with informed counsel from state partners and external sponsors, makes strategic decisions about whether and how to respond to expressed needs for customized extracts of Quarterly Workforce Indicator (QWI) data. My remarks are intended to contribute in a positive way to this process of strategic decision-making.

My thinking begins with a belief that most uses of QWI data are and will continue to be casual. Few QWI uses will be other than occasional. Examples of occasional or casual use include:

- Targeted allocation of economic development subsidies, education investments, and workforce training dollars.
- Periodic forecasts of public transportation infrastructure needs.
- Department of Defense Base Realignment and Closure (BRAC) deliberations, decisions and their aftermath.
- Single topic studies conducted by experts and others.
- One-time queries by electronic and print journalists.
- Advocacy for or against a specific legislative or executive proposal.
- Calibration of program performance standards targets.

¹ These remarks were prepared for delivery at the Annual Local Employment Dynamics Workshop, convened by the Census Bureau LEHD Program in Washington, D.C., January 27, 2005. The word 'user' in the title means use of Quarterly Workforce Indicator (QWI) calculations prepared by the Local Employment Dynamics (LED) component of the overall LEHD Program (<http://lehd.dsd.census.gov>). Disclosure: The author has participated in many aspects of the Census Bureau LEHD Program from its inception in 1998, including consultancies, being an author of an LEHD Program Technical Paper, making presentations at previous annual workshops, and directing the ongoing *Market-responsive Education and Employment Training System* (MEETS) pilot project sponsored by the Office of Policy Development and Research, Employment and Training Administration, U.S. Department of Labor, which uses QWI data and involves sub-contracts awarded to LMI unit partners in California, Colorado, Florida, Illinois and Maryland (<http://www.ubalt.edu/jfi/meets>).

Casual use means:

- Infrequent interest in QWI access.
- High incidence of one-time QWI request specifications.
- Serious user memory loss about QWI technical details.
- Difficulty in knowing when QWI definitions and indicator values change.

Individually and together, the four features of casual use described above pose a challenge for the LEHD Program management team, state partners and external sponsors. Infrequent need and high incidence of one-time requests have implications for Web design and refreshment. User memory loss and unawareness of QWI changes have implications for both Web design and strategic planning of staff and user training.

Three topics are covered below:

1. Many potential QWI users do not know what they need.
2. QWI accuracy—what is and what ought to be—is often misunderstood.
3. An optimal mix of self-service opportunity and investment in mediation has not been defined, but there is much to be gained by doing so.

EXPRESSION OF NEED

I begin coverage of this topic with a confident assertion based on more than 40 years of engagement with many different producers and users of labor market information (LMI)—we have underinvested in consumer education, explaining to customers whether and how we can respond to a request, or why we are not willing to satisfy their request.

“Give the client what they want” is often a guiding principle imposed on the public LMI community. This principle reflects motives ranging from competition for funding, through political necessity to bureaucratic convenience.

QWI extracts will be sought for use at two distinct stages of decision-making:

1. At the beginning of a multi-stage process to select a future course of action—a forward-looking application.
2. After an intended course of action has been chosen—a search for confirming evidence application.

QWI access requirements differ in important ways between the ‘forward-looking’ and ‘search for confirming evidence’ applications.

- The forward-looking use requires access breadth, depth and flexibility. Customer satisfaction criteria are likely to be ill-defined.
- The search for confirming evidence application is focused, requiring little breadth and no flexibility. The criterion for customer satisfaction is clear— if confirming evidence is found the customer will be satisfied.

I express a strong preference for investment in ease of informed access for forward-looking QWI uses over conscious attention to facilitating searches for confirming evidence. The payoff in the former cases is a possibility of making a difference, impacting a decision. The latter is unlikely to involve behavioral change.

Stated another way, I encourage leaving those seeking confirming evidence on their own, while reaching out to those at the early stages of decision-making. Concurrence with this expression of investment strategy has implications for our approaches to QWI accuracy and movement toward an optimal mix of self-service opportunity and investment in mediation.

QWI ACCURACY

I have been bemused, annoyed and frustrated about the quality of the QWI accuracy conversation. Some have used ‘noise’ as a blunt-instrument weapon against QWI use, without consideration of when and how ‘noise’ matters. Some have used ‘lag’ as another blunt-instrument weapon against QWI relevance, again without consideration of whether and how ‘lag’ matters.

A tension between ease of QWI access for local applications and QWI accuracy has been acknowledged from the beginning of the LEHD Program. Much work remains to be done to fine-tune a response to this recognition.

Each and every conversation about QWI ‘noise’ and ‘lag’ should begin with agreement about the intended use or uses of the information. Accuracy requirements can only be defined for a particular use or defined set of uses.

Much of my frustration about the imprecision of the QWI accuracy conversation is traceable to a common failure to bring use-specific accuracy requirements into decisions about whether and how to respond to particular user requests for help. I understand the causes for and dynamics of this failure. But, we must respond to, not continue to shy away from, this challenge.

“The data are too old” is a common lament. Sometimes, but not always, this is unfortunate. Today, we are ill-prepared to counter this view, so potential value-added from wider use is lost.

Too little attention has been given to QWI *stability* over time. The time-path of each indicator is unique. This does not mean the indicators are insulated from each other. It does mean that each trend is indicator-specific, location-specific, and time specific. Many years ago, *The Wall Street Journal* op-ed page included the following: A trend is a trend is a trend. The question is: Will it bend? Will it alter its course through some unforeseen force, and start all over again?

We should be devoting more attention to answering our own version of *The Wall Street Journal* questions—where and when is a single QWI stable enough to be certified as useful? That is, can we separate the QWI set into segments, such as ‘stable enough’ and ‘not stable enough’, for confident use in defined applications? If we can, and I think we can, we will be honoring our professional qualifications and carrying out our professional responsibilities.

Another topic worthy of more attention is often cast as an accuracy issue, which is why I introduce it here—whether and how to compare published Quarterly Census of Employment and Wages (QCEW) information and QWI information. The QCEW is long-standing, widely understood, respected, comfortable. Each QWI is new, understood by few, subject to change, cautiously respected, and a source of unease. But this is not an accuracy issue. At its core it is a cost and comfort issue.

For many purposes, one, and only one, source of information is preferred by both producer and user. Absence of possible substitutes or complements makes the choice of evidence easy—indeed there is no choice, or a simple choice between evidence or no evidence; no transaction cost need be incurred to weigh the pros and cons of competing possibilities; no absorption of resources is required to explain differences among sources; no response need be mustered to curiosity about appropriateness for the intended use.

MIXING SELF-SERVICE OPPORTUNITY AND MEDIATION

Up to this point, I have expressed beliefs that most users of QWI information will be casual; some, perhaps many, will have sweeping poorly-defined ideas about what is sought; most of those with the least precise requirements truly seek dependable counsel and intend to use what is offered in what most of us would agree is a good-and-proper way to better inform decisions that will have consequences; and use-specific accuracy tolerances are difficult to define and communicate at low cost.

As I have said in many previous forums of this type, the basic questions posed for our response have changed little since I started paying attention in 1962. What has changed dramatically, and continues to do so, is our ability to respond.

Ease of access to information, at little or no apparent cost to the user, creates both opportunities and dangers. Open access to QWI information can be seen as an invitation to misuse, intentional or not.

Profit-seeking vendors will offer to bundle and deliver QWI extracts to motivated clients. Disclosure: I am a non-profit deliverer of QWI extracts to motivated clients. Who will monitor the behaviors of these vendors? What criteria will be used to sit in judgment? What sanctions will await those who misbehave? Do we have a plan for answering these questions?

Is there a practical complement for open access to QWI information? Yes, certified mediation. But certification connotes winners and losers, insiders and outsiders, the privileged and everyone else. Licensure and accreditation are positive contributions in some circumstances, but not in others. Each is, by definition, at least a temporary institutional barrier to entry. As a society, we appear to be most willing to embrace licensure and accreditation when we have the least personal understanding of what competent practice involves, when the consequences of incompetent practice are most dire, and when the individual cost of determining competence oneself is prohibitive.

I close by revisiting and blending the three topics that have been covered. QWI information is available—on the Web, through state LMI units, and from what is expected to become a growing number of others.

Most potential users of this new QWI information cannot yet articulate what they want from this full array of possibilities. The relevance of accuracy of the available QWI information for particular intended uses is simply not understood in most quarters—the two most glaring descriptors of misunderstanding are ‘noise’ and ‘lag’. We, the producers and mediators, remain uncomfortable with these QWI attributes. But the information is out there, available for use and requested assistance to ensure proper use.

Expectations are high. Concurrent production and marketing efforts have been successful. The queue of potential users of QWI information is lengthening. Expressions of customer satisfaction are sought to bolster claims of relevance and value. Reliance on self-service is risky in this environment. Those who make mistakes or become frustrated and end a query will not be allies.

We are trying to reach, serve and satisfy casual users of QWI information. Amazing progress has been made since 1998. The 2004 transition from beta phase to production has been announced and is widely accepted.

QWI production is accompanied by opportunities and threats. An immediate threat is the curious person who steps forward but then fails to receive delivery of the expected product, or receives the product and is disappointed.

We can respond to the disappointment threat by collective engagement in a strategic exercise to prioritize and align our mediation efforts. When does 'lag' matter? When does 'noise' matter? When should the curious be told "this may not be for you"? When and how should shared responsibility be defined and required—"we can take you this far, but you will have to take it the rest of the way, and here is a step-by-step guide for doing so".

I hope we keep these thoughts in mind as we welcome our public visitors to this national forum tomorrow. In some cases, this will be a one-time opportunity to motivate further action. Let us be sure that the motivated who then act are satisfied and become our allies.