

Beyond Jobs: Kauffman Challenge Deliverables

DOCUMENT 1A: Narrative - Web interface work

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Background

Like any genuinely empowering online market for hourly labor, our uFlexi software has five guiding principles:

1. **Control for all users**: work-seekers for instance need not only control of their hours but what work they will do and on what terms, for whom. Buyers of labor (we don't use the term “employer” because it involves a specific legal function, which may be handled by intermediaries in markets like ours, see below) need to be able to book workers for any need very quickly. They should be able to nurture a pool of workers.
2. **“Horizontal” market**: commercial labor market platforms tend to be vertical (one app for dog-walking, another for deliveries, a third focused on house cleaning; and so on). But worker progression and constant alignment with employers' needs requires a market that seamlessly handles all types of work, enabling workers to do as many as they wish and qualify for and constantly be aligned with new options.
3. **Role for intermediaries**: “gig work” services typically treat workers as “1099” independent contractors. An empowering market has to have the option of treating them as “W2's”. That creates a pivotal role for labor market intermediaries. (These could be staffing agencies, employment charities or public agencies.) Each needs to be able to enforce its own rules. Intermediaries must be incentivized to supply to each other within their own controls, this widens everyone's opportunities.
4. **Protections**: the market must be kept legally compliant and ensure solidity of transactions; users must know their counterparties will deliver as expected.
5. **Data exploitation**: A market dedicated to control for users can generate enormously granular data about supply, demand and pricing. This needs to be stored, processed and presented efficiently. It can underpin a spectrum of interventions to support users.

Any market aiming to de-commoditize workers while reaching out to underserved populations will face two ongoing challenges which often conflict with the aims above:

- **Simplicity**: Our target users are often not comfortable with technology. All the above has to be viewed through the prism of users unfamiliar with the conventions of web or phone interfaces.
- **Slim resources**: Apps like Uber can be a consistent pleasure to use, setting expectations for how we interact with these platforms. But leading Apps attract many millions of dollars in investment that the social sector cannot hope to match. We have to find the most cost-effective ways of achieving outcomes that we may not regard as the best possible.

Assumptions

We arrived at two guiding assumptions about readiness for US launch:

- **Web registration**: Because a CEDAH seeks detailed data about any work-seeker - so it can align them with as much opportunity as possible – we confined the registration process to the web. It is simply too frustrating to set up a meaningful account on a phone screen. In time we may move to simplified online registration but that was not a priority at this stage where work seekers would likely be closely supported as they moved into a new market.
- **The intermediary must be pre-eminent**: Any organization vetting workers into the market and exposing them to buyers under the intermediary's brand was entitled to overarching control on what that individual could do, how they were presented and the rules for engagement. We have no desire to disintermediate, or supplant the authority of, bodies that often work tirelessly to advance local people. Intermediary staff of the appropriate level must be able to overrule the system, the worker or the buyer. They cannot however override legal controls, entered at back office level.
 - As part of the above; our system does not use email for validation. Target users may not have a meaningful account. We accept the intermediary's decision that the person is genuine absolutely.

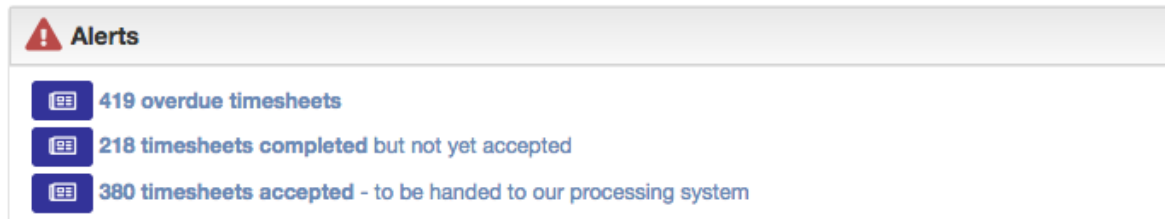
Upgrade areas

Analysis above led to these priority focus areas for enhancements:

New homepage structures

We wanted to make web homepages closely resemble those in our mobile app. Crucially, we knew users wanted better categorization of "alerts". These are messages the system compiles to highlight issues on which it needs the user's authority to do something. Each alert is a link to a page waiting for the user's inputs. It was felt these flags could be ignored if perceived as hectoring or confusing.

The problem is most acute for agency (intermediary) users. If a busy market is neglected within a week they could see an array of alerts including; timesheets that need action:



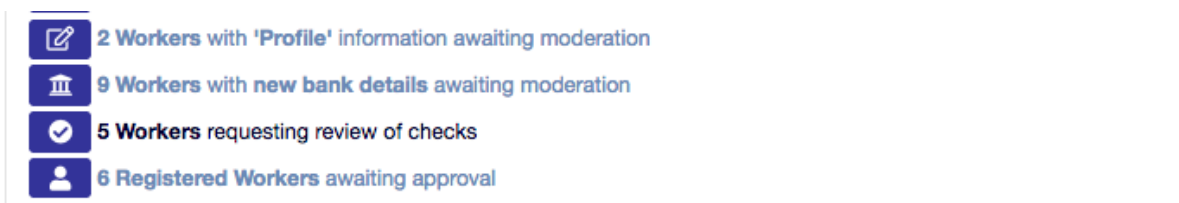
We deem a timesheet “Completed” once buyer and worker have confirmed it. The next stage is for agency to set it at “Accepted”. This extra step is a control for the agency. They may have reason to believe a timesheet is fraudulent or exaggerated and can intervene before it moves to processed for invoicing/payroll.

The system will be highlighting issues like “Overdue” timesheets that have not been accepted by buyer, worker or both to all parties involved. But it may require an agency user to either clear a timesheet (decide the work was not done) or approve it (perhaps after a call to buyer and worker).

These alerts are high priority because progression of timesheets determines pay and progression of workers. It is how the platform learns a booking was completed satisfactory, promoting the individual through its ranks and adding to their record used as a resume.

There are other issues which the system can be set to await agency approval of inputs by a worker. This to allow the agency to protect their brand. It would be unacceptable for example for buyers to see details or images for a particular worker that did not match the agency’s standards or which might involve them in legal obligations without their consent.

The rule for these situations is: worker can make changes but is then told agency must approve them. These requests for approval are monitored with alerts.



We looked at aggregating these alerts and making them more hierarchical in a format that would work for both web and mobile. Wireframes were produced. These can be seen in document 3c in this section of our website.

But, only having resources for an App for workers, we did not believe we could easily unify all user’s homepages, then align all other pages with the new conventions. (We have to keep all pages aligned because our agency users can “Act as”. This means the system treats them as a given buyer or

worker until that option is unclicked. With agency users able to move fluidly between different user accounts we believe it would be discomfoting if there were radical screen updates for buyer or worker alone.)

“Checks”

“Checks” are the building blocks of progression in a market like ours. The system needs to know every possible datapoint about a person to help them towards the widest range of work options. Checks are used to align a person with as many roles as possible.

Checks were originally called “Verifications” but this term was felt by users to be too imitating and unwieldy on a mobile screen. We tested “Checks” in groups and – despite fear of confusion with its meaning as an “instruction to my bank to pay” for older users – it was favorably received.

These datapoints are a worrying potential source of complexity for users. But without them, the system has to take a lowest-common-denominator to workers. This is routine for commercial hourly labor platforms which commoditize workers in pursuit of simplicity, ease of matching with buyers, and keeping labor costs low. For example: a dog-walking app need only know if a worker is happy to oversee both large and small pets and perhaps any formalized training around petcare. They have no need a fuller picture of the person or their aspirations.

To tackle this we divided checks into three categories:

1. Credentials: These can range from a Bachelor’s degree to a certificate awarded by a youth club. They can be buyer specific, for instance “Completed induction at Acme Inc.”. Credentials are picked from a list by the worker but have to be confirmed by an agency user before they become active.
2. Tags: This is a nebulous folder, used for any factor about an individual that might attract resources for them or help report on their outcomes. Examples include; recently laid off, ex-incarcerated, lone parent or opportunity youth. Because these can be sensitive categorizations, a tag can be concealed from wider view in the system. Again, these have to be verified by the agency.
3. Preferences: These are not verified and simply record the individual’s willingness to, for instance, wear a uniform, lift loads, work in a smoker’s house (if a caregiver).

Any check can have an end date when applied to a person. That might cover an expiry date on a nursing certificate, a day when a formal status no longer applies to them or when a preference is to end, for example “Willing to work outdoors” might be set by a worker to sunset at the end of summer; they won’t work outdoors in winter.

One issue we are currently wrestling with: Checks force a binary Yes/No commitment. This is by design, the system uses the decisions to align a worker with the optimal opportunities based on their settings. But in the offline world, these decisions can be sensitive and hard to put in concrete language. An example we uncovered comes from the homecare sector. Is the work-seeker willing to change an adult’s diaper? It can be a crucial task in many visits and can’t be forced. The issue is often

fudged in offline dialogue, a worker discovers its part of a booking rather than having thought through the issue beforehand. We see wording of these kinds of checks as the key issue, rather than any technology solution. We are working with experts on the issues.

Our challenge with checks, arising constantly in groups, is the diversity of possibilities, sharp regional differences and lack of a coherent taxonomy across the US. Within the Kauffman Challenge project, we reached out to [Credentials Engine](#), a non-profit working to shape a schema for all credentials in the US. That project is in its early stages and appears to be focused on traditional jobs. We are loathe to impose our own structures in light of better resourced initiatives and have opted for now to replicate the O*NET folders (see below).

Roles

A role is a type of work such as; “Carpet layer” or “Checkout operator”. Like checks they can be generic (taken from the [O*NET database](#) of job types) or specific to one employer or intermediary. Each role can have a fixed payrate or allow dynamic pricing constructed by applying each worker’s personal rules to the parameters of any given booking.

A role can include a list of checks that a worker must currently have to perform the work. For example: a company might set up a role “Acme Hotel, kitchen hand”. Checks required might include:

- Credentials:
 - Food hygiene certificate
 - Livescan fingerprint record
- Preferences:
 - Willing to work with meat
 - Willing to work in physically uncomfortable environments

It may be the hotel is receiving a grant to bolster local employment and adds the tag “unemployed for at least 3 months” as a requirement for its kitchen hands. The system can then identify workers with all these required checks.

Our challenges with roles mirror those with checks. A mature market in uFlexi will have thousands. Using demonstration data we showed this to potential users and it became clear how taxing it can be to find the ones to be offered to each person if relying on word-search with no coherent structure to navigate. We are seeking to resolve this with functionality we call “Auto-offer / Auto-accept. This created some immediate issues explained by Karen Miller from our developers team:

Auto-offer & Auto-accept Roles

A new feature was introduced to automatically offer new roles to workers who match the role criteria (if the agency had agreed to auto offer roles).

New O*NET roles being introduced into the system caused it to attempt to send all (approx. 1000) O*NET roles (as they are stored at System Level) to all eligible workers. Due to no

checks being set or geographical boundaries being set on the roles (by O*NET), every role was offered to all workers (in auto offer agencies and their partnered agencies).

This caused each worker's role list to contain hundreds of roles.

A decision was made to remove the auto offer/auto accept until a better method was introduced; possibly having an "offer role" marker on each new role that is later set when an agency/backoffice user allows it to be offered.

This is a challenge unique to a system aiming to constantly introduce workers to new types of work based on their underlying data points. It would help systems like ours if O*NET were to issue its classifications with a formalized list of any accreditation required.

Again, a comprehensive schema of worktypes would be invaluable. There appears to be widespread dissatisfaction with O*NET, the government sanctioned set of folders and reference numbers for worktypes. We were told; it can be slow to update as new work types appear and existing ones are often categorized in ways not felt to be helpful.

We reached out to JDX, [Jobs Data Exchange](#), the non-profit operation aiming to create a new, evolving, taxonomy for all types of work. As with Credentials Engine we believe there is a danger irregular work will not be adequately factored into these emerging classifications.

Our position paper on the need to reflect Irregular Workers in attempts to create a national schema to manage credential/role complexity is included in this section of our website.

Agency control

Our system is an underlying platform. It doesn't seek to impose its brand or disintermediate other players, only to be a neutral resource opening a market and incentivizing reliable transactions. This model is analogous to the function of the "[Global Distribution System](#)" (GDS) acting on behalf of workers in the travel industry but interacting with consumer sites such as Expedia or booking.com.

Unlike these intermediaries in the travel sector, our intermediaries are established organizations, typically small. They are not creating a business specifically around our platform on a huge scale as was the case with the eco-system of consumer sites spawned by the GDS. This means we have to respect their diverse cultures, relationships, rules and sensitivities with a range of controls available in uFlexi.

Within this project we majored on:

Switchable elements

This allows suites of functionality to be turned off for an individual agency (intermediary) to create infinite ala carte options. Realistically, we have to recognize immediate, full, worker empowerment is threatening to a small business with a limited pool of workers. They want to nurture that pool and offer opportunities, ideally growing it. But they fear upheaval if we try to force changes in rules.

We have long enabled our "My Terms" screen for users to be hidden for any agency's workers. This page allows each individual to define parameters like base pay rate, how far they will travel from home, minimum period of notice for a booking, minimum length of booking and so on.

My Terms

You can set a fixed payrate for specific Roles or selected Clients. Some roles have a fixed rate agreed with the client. If you do not have a fixed rate in place for any potential booking, we use your inputs on this screen to work out your rate.

These are the minimum terms on which I will sell my time in this system

* Minimum hourly rate \$ 12.50 [Guide: How to set your rate](#)

Current Reliability Rank 6 [Guide: Reliability Ranks](#)

We can make sure you get extra pay if a booking requires you to travel. There can also be an increase in your rate for shorter sessions or bookings with not much notice. You can change these settings as you become more experienced in the market.

Hide advanced settings

Travel

How far are you willing to travel?

I can travel 8 miles

from address

* Address Line 1 3398 Albedo Street

Address Line 2 Hacienda Heights

Address Line 3 Los Angeles County

* State California

* ZIP Code 91745

Show mark-up options

This level of individualized control can be enormously disruptive, over-riding existing contractual agreements (for example; where a worker has agreed to a defined travel distance from an employer's building with no mark-ups related to distance).

Within this project we were advised a priority should be removal of any display of pay or charge rates. Many intermediaries calculate these after a period of work based on contractual formula that defy computerization because they rely on multiple external judgements and data sources. Removing all monetary calculation throughout an agency's iteration of the system has challenged some of our earlier logic. We use pay/charge for default prioritization in some lists for example. Those lists now need new, but coherent, ranking for an agency that may have just turned rate display off.

Our business spec for "Switchable Elements" is within this section of our website.

Multiple contract possibilities

As part of ensuring a booking is solid, uFlexi ensures each buyer and worker has a contract with the agency (intermediary). Previously these contracts were one-size-fits-all within each agency. An agency could update their contract for either buyer or worker but that then became the contract for all new registrants. (It could be upgraded for previously registered buyers or workers on an individual basis.)

Participants in our groups felt this would deter usage. Many agencies have a portfolio of contracts active at any time. For example they may have one worker contract for students, another for those with years of experience and variations between branches of the agency.

To extend this level of enforcement into our markets we upgraded to a facility allowing a picklist of contracts with expanded options for updating terms with any one party at any time. System reporting screens show agency users which contract any buyer or worker is on at any time.

Our business specification for multiple contracts is included in this section.

Agency language

It can seem insignificant, but it became clear how important the use of an agency's individual terminology for "workers" and "buyers" can be. For example, we talked with organizations that call their "workers" respectively "associates", "care-givers", "colleagues" while others referred to those buying labor as "clients", "partners", "families" and so on.

To avoid forcing our terminology onto any agency we made these terms variable in the page on which back office manage an individual agency. This had to include provision for non-standard pluralization (we know of one entity that likes to call its workers "People" which of course de-pluralizes as "Person").

Buyer Term	<input type="text" value="Client"/>	<input type="text" value="Clients"/>	<input checked="" type="checkbox"/> Override
Seller Term	<input type="text" value="Associate"/>	<input type="text" value="Associates"/>	<input checked="" type="checkbox"/> Override

Analytics

Public agencies such as workforce boards can play a catalytic role in markets like ours. But they have detailed and widely varying reporting requirements. Federal dollars for the workforce system rest on [six performance metrics](#), structured around traditional jobs and credentials. Incentivizing these bodies to support interventions like a CEDAH (Central Database of Available Hours) requires detailed reporting that each can attempt to align with the aspects of performance metrics they have negotiated with their state workforce board or the federal government.

The extraordinarily granular data markets like ours can capture merits an extensive project on analytics tools that could be applied. This section of our website includes our business specification document for adding advanced analytics tools. We have also included a developer's analysis of the route taken to add initial timeline and geographic mapping tools.

As a foundation for this kind of tool, we reorganized system reporting screens into tabs. The SUMMARY, Control, Breakdown and All tabs on an agency's page for reporting on bookings activity for instance allow a user to quickly extract the data relevant to her needs of the moment.

Bookings report ?

Use this screen to search bookings made by 90068work's users.

Without search criteria, we display all bookings

[Enter search criteria](#)
[Show analytics](#)

SUMMARY
Controls
Breakdown
All

SUMMARY

685 bookings found, displaying 1 to 200

Booking No.	Status	Client	Associate	Role	Location	Ma
P11336/B1	CONFIRMED	Angeleno Care Inc.	Mike Jones	Admin. support	2560 Rosemead Boulevard, 91733	Jul 1
P11333/B1	CONFIRMED	Angeleno Care Inc.	Andrew Lippa	Personal care	14636-14662 Gale Avenue, 91745	Jul 1
P11330/B2	CONFIRMED	Angeleno Care Inc.	Andrew Lippa	Admin. support	14601-14755 Salt Lake Avenue, 91746	Jul 1
P11329/B1	CONFIRMED	Angeleno Care Inc.	Yvonne Rodriguez	St. John's: Exercise Assistants	701-799 Toluca Avenue, 91790	Jul 1
P11328/B1	CONFIRMED	Glen Zapps	Yvonne Rodriguez	Glen's Personal Trainers	15101-15107 El Selinda Drive, 91745	Jul 1

Direct Employment Relationships

Multiple government agencies are focused on promoting employment and economic growth. These bodies can play a uniquely enabling role as intermediaries because they combine resources with lack of any need to ringfence workers.

Most organizations that train workers need to then “own” the relationship in some way to ensure a return on their investment. For example a medical staffing agency might help a nurse get up-to-date certification but then contractually forbid him from working through a competitor. A public agency could get people “workforce ready” and then have no aim other than seeing them get maximum opportunity.

Additionally, public agencies may be unready to take on the employer-of-record function for workers. This requires insurance, payroll mechanisms and legal liabilities. In uFlexi terms, a public agency is an intermediary fostering pools of workers through a set of checks ready for progression but then wanting to avoid locking them into any one agency as they transition into the workforce.

To accommodate this nuanced function, and some subsidiary business cases, we developed the concept of “Direct Employment Relationships” described in more detail in the business specification document within this section.