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Pam Harris (MT) and  
Pam Schenker (FL)  
*Secretary*

## NATIONAL STATE DATA CENTER STEERING COMMITTEE

*Representing a Network of 1,800  
SDC/BIDC Data Centers and Affiliates Nationwide*

*We Bring Value-Added Census Data and Education to the User*

Julie Hoang (CA)  
Barbara Ronningen (MN)  
Robert Scardamalia (NY)  
Jane Traynham (MD)  
Dan Veroff (WI)

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### State Data Center/Business and Industry Data Center Annual Meeting Minutes October 10-12, 2007 Suitland, MD and Arlington, VA <http://www.census.gov/sdc/www/07octannmtg.htm>

#### Wednesday - October 10, 2007

##### Welcome and Introductions

*Lisa Blumerman, Chief, Customer Liaison and Marketing Services Office*, welcomed everyone to the meeting

*George Barnett, Human Resources Division*, presented a safety overview

*Howard Shih, Chair, Census Information Center*, welcomed and thanked CLMSO (Customer Liaison Marketing Services Office) staff for putting together the agenda and the program

*Xan Wedel, Chair, State Data Center*, welcomed attendees and reminded them to fill out the evaluation forms and also reminded the SDCs that there is a tree-state luncheon today.

**Introductions** - The microphone was passed around and everyone introduced themselves. There was a very good turnout with 48 SDC/BIDC states represented, as well as, American Samoa, District of Columbia, Guam, Saipan, MP, and the Virgin Islands, for a total of 77 SDC/BIDC attendees.

##### 2010 Decennial Census Update

*Teresa Angueira, Associate Director for Decennial Census*

<http://www.census.gov/sdc/www/14angueira.pdf>

Teresa discussed the continuing budget resolution environment that the Bureau is currently operating under. The current continuing budget resolution extends through the middle of November and provides funds at 2007 level. The 2010 Census budget for 2008 was proposed to be an increase relative to 2007, thus the Bureau is assessing all program activities to determine which ones can be slowed, delayed, etc. and what the impact would be on the 2010 Census. The Bureau anticipates that:

- American Community Survey (ACS) - all operations will be able to continue at current funding levels.
- Master Address File/Topologically Integrated Geographic (MAF/TIGER) Improvement Program will also be able to continue at current funding levels.
- 2010 Census Dress Rehearsal is at risk at current funding levels; the Bureau has prioritized what needs to be tested. The Highest priority is to test the systems and procedures for automation for data collection.
  - Data Response Integration System (DRIS)
  - Field Data Collection Automation (FDCA)
  - Mailout/Mailback and who needs non-response follow-up. Two contractors need to test the integration of the systems.
  - Using paper forms for group quarters enumerations.

There are only 312 areas that need to be processed for the MAF/TIGER Improvement Program. The Bureau anticipates that all areas will be completed by April 2008. The Community Address Update System was originally designed for rural areas and areas where the Bureau will not be getting address updates from the USPS. The Bureau cancelled this activity in 2007 and 2008 due to budget constraints, and will include this activity within the 2008-2009 canvassing. The MAF/TIGER Software is complete and the first participants to use the software will be Local Update of Census Addresses (LUCA) participants.

The Bureau has completed the dissemination of the ACS 2006 data products. They are beginning to plan for 2008 when they will be producing the 1<sup>st</sup> 3-year estimates for 2005-2007.

For the 2010 Census, the Bureau has been involved in extensive testing. They have completed the 2005 and 2006 tests and the evaluation of these tests. As a result of the 2005 test, the Bureau determined that they needed further testing on bilingual forms.

For the 2008 Dress Rehearsal, the Bureau has completed LUCA and address canvassing and are currently in the field with group quarters validation and anticipate completing this operation even though they are operating under continuing resolution budget. The software was also completed for coverage measurement independent listing that is scheduled to begin November 1<sup>st</sup>; plans are to complete this paper-based operation.

Due to the Continuing Resolution, the Bureau is reviewing other operations to determine what can be cancelled and what can be postponed. It is a priority for the Bureau to keep the 2010 Census on track. LUCA operations have begun. They have signed leases for all 13-regional Census Offices and Puerto Rico and hope to open them by the end of January 2008 where they will process LUCA information from local governments for address canvassing.

For the 2010 Census, all major contracts have been awarded. Harris Corporation received the DRIS & MAF/TIGER Improvement contracts. Lockheed received FDCA. They have also awarded contracts for printing the mailout/mailback Census forms. The Data Access and Dissemination System (DADS II) contract has been awarded to IBM; they will extend the life and increase the efficiency of the current DADS. The Communications contract was awarded to Draftfcb of New York. All Census Advisory Committees will be convened next week and discuss what is needed by the communications effort.

*As a result of the questions and answers—*

The Bureau has not postponed any outreach and partnership programs for 2010. One of the first tasks for the communication contractor will be to develop the media and partnership efforts. The Bureau also agreed to see if the CICs and SDCs can meet with the communication contractor. The attendees wanted to ensure that the communication team hears from all aspects of America, including rural America, and emphasized that one size does not fit all.

The communications contractor is going to develop a strategy for partnership efforts and will rely on these partnerships to be part of the community that will help convince the population to either respond by mail or open your door to an enumerator. The Bureau will hire from the community to help open doors, etc. and they understand that this may be more of a challenge due to the current immigration policies and political environment than in the past.

There will only be one bilingual form Spanish/English. The Bureau will review ACS data to determine which large tracks would benefit from this bilingual form. The only forms that will be initially mailed will be English or Spanish/English and people will need to call the Bureau to request forms in other languages. The other languages and language assistance guides that will be available are: Spanish, Chinese, Vietnamese, Russian, and Korean. Discussion centered on whether recipients needing the other language forms will call to request them via phone.

Regarding LUCA, Linda Franz from the Geography Division mentioned that the Bureau has developed an insert that will be mailed with the LUCA materials that will help clarify what is a "group quarters" facility. The Bureau will make this information sheet available to the CIC and SDC networks.

## Geography/LUCA Update

*Linda Franz, Assistant Division Chief, Geography Division*

<http://www.census.gov/sdc/www/1franz.ppt>

The MAF/TIGER Accuracy Improvement Program is on schedule and Harris Corporation exceeded their FY2007 goals. Linda discussed the purpose, importance, and timeline for the LUCA program. Advance notices were mailed to about 40,000 local governments in January/February 2007. The invitation letters were mailed on August 7<sup>th</sup>. LUCA submissions are due back to the Bureau no later than April 4, 2008. The Bureau will process changes, validate, and send feedback to participants in August to October 2009. Then there will be a LUCA appeals process that will run between September 2009 and January 2010. All appealed addresses will be checked by the Bureau during nonresponse follow-up.

Respondents are overwhelmingly selecting Option 1. The Bureau has heard from only 2 states and these states declined the invitation to participate.

The Boundary Annexation Survey (BAS) will include all legal entities starting with the 2008 BAS. The information collected is important for both the ACS and the 2010 Census. The Bureau is hoping to continue to collect BAS data from all entities on an ongoing basis after 2010. Advance letters were mailed in September 2007, where local governments were asked to respond if they have had annexations and, if so, to indicate the material format that they would like for BAS. Materials will be mailed out in January 2008 and the response deadline will be April 1, so the information can be reflected in both ACS and population estimates. Local governments can elect to do their BAS in the following modes: paper; MAF/TIGER Partnership software; Digital BAS (shape file); e-BAS for forms submission (not for spatial or boundary updates); or Web BAS (starting in 2009 - allow both form and spatial updates via the web).

The Bureau's Participant Statistical Areas Program includes: census tracts; block groups; census designated places; and census county divisions. The Census Bureau proposed criteria based on what worked and did not work well in Census 2000. The Bureau's proposed criteria were published in the Federal Register, April 6, 2007. The response period closed on August 7, 2007, and they received nearly 200 comments, most were pertaining to block groups and census county divisions. The next step is for the Bureau to consider the comments, so if you did not comment within the timeframe, there is still time to get your comment in to the Bureau. After initial review, it appears that the public wants reliable data, but does not want to bump up the threshold.

From the comments received, the Bureau realized that it needs to further clarify the Federal Register notice regarding the use of hyphenated area names for CDPs (Census Designated Places). CDPs can also be defined using non-physical/visible boundaries, however the Bureau does not believe that there will be a lot of these. CDPs are used for more than just Decennial Census; ACS and the Economic Census will publish results for CDPs.

Based on data user hits in AFF (American FactFinder), CCDs (Census County Divisions) were not accessed as often as other geographies. Therefore, the Bureau wanted feedback as to whether this geography was still needed. Review of initial responses indicates that CCDs should be retained.

The timeline for the Participant Statistical Areas Program was discussed. Also, the Bureau is looking at the delineation of TAZs (Traffic Analysis Zones) relative to ACS. They realize that they may need to take a multi-level approach and the thought is that larger ones be used to delineate traffic zones. The School District Review Program is conducted every 2 years by the Census Bureau. The Bureau will be working with state partners in the next few months.

## Remarks from the Office of the Director

*Preston Jay Waite, Deputy Director and Chief Operating Officer*

Jay highlighted the recent staffing changes at the Bureau. Dr. Murdock has not been confirmed yet and the timeline for the confirmation is unknown at this time. Dan Weinburg is working with Teresa Angueira filling out the team for Decennial Census.

The budget is grim at this time. The Bureau is operating under a continuing resolution. Under this scenario, the Bureau receives the same amount of money as last year, the amount that the senate passed, or the amount that the house passed, whichever is less. This environment is fine for continuing programs like SIPP (Survey of Income and Program Participation), but it is not fine for the decennial census or other start-up programs.

Jay discussed the uncertainty that surrounds the current fiscal year funding and the implications. Some of the items mentioned are that the Bureau is trying to save on energy and has postponed all contracts for the decennial census with the exception of DRIS and FDCA contracts. They are not proceeding with DADS II or MAF/TIGER contract. The communications contract that was awarded recently is using some money from FY2007. The Census Regional centers may not be opening on schedule. The Bureau has cut back on everything that they could and there is still a shortfall. They have asked contractors to slow down or to stop on some projects. The bottom line is that they will not be able to have a full dress rehearsal in April. The Bureau is trying to get DRIS and FDCA (hand held computers - nonresponse follow-up) to work together. If timeline slides too long, then nonresponse follow-up will slip on 2010 operations.

The Bureau is looking at all options to cut expenses. The Bureau may not do group quarters for the dress rehearsal. For example -- Interview Ft. Bragg - living in a housing unit, but not those that are living in a barracks. They might omit doing update-leave (hang a form on the door).

The current continuing resolution goes through the middle of November. The Bureau did not get an exception to the continuing resolution, but they are working on this. If they do not get one, it would not be possible to test the two automation systems fully during dress rehearsal. DRIS and FDCA were scheduled to spend 41 million in first 6 weeks of the fiscal year.

The bottom line is that that Bureau is about \$15-\$17 million short and therefore they can not do the level of work that they should in preparation for the 2010 Census.

LUCA for 2010 is moving forward. The Bureau will not mail a form to houses that are not on their address list, thus they will not get a form back, and then they will not send anyone to the housing unit door for nonresponse. It is important that the SDCs urge local governments to do as much as possible for LUCA. Now is the time for them to work with the Bureau as partners. Unfortunately the addresses that the Bureau may miss may be in pockets.

### *As a result of the questions and answers--*

Concern was expressed that if people are living in a housing unit that has been split into multiple units that may not be according to code, residents may not want to give an honest response regarding the unit structure and occupancy. Even if there are multiple mailboxes or electric meters, enumerators go with what the "occupants" tell them. The Bureau is working on this to try to ensure that every unit and person is counted. The Bureau has two types of staff that go out to the unit; one that lists the addresses and one that interviews the residents.

Does the Bureau feel that if a community does not get a good count and if they did not participate in LUCA that it is the local government's fault? The Bureau has offered three levels of participation in hopes that local governments will participate. The Bureau will also be looking for local people that know the area to help with canvassing. There are about 39,000 governments and the Bureau can not train all of them, therefore the Bureau is involving the states, computer-based training, etc. to help reach everyone.

## Concurrent Break-Out Sessions

There were a number of concurrent break-out sessions during this meeting. Below are the titles and links to the handouts or PowerPoint presentations.

### SDC 101

*Xan Wedel, Kansas SDC*

<http://www.census.gov/sdc/www/1xan.pdf>

### Introduction to LEHD

*Colleen Flannery, Customer Liaison and Marketing Office*

<http://www.census.gov/sdc/www/11led.ppt>

### Stats 101

*Leonard Gaines, New York SDC*

[Stats 101 PowerPoint](#)

[Stats 101 Key Formulas](#)

### ACS PUMS: How to Aggregate Sample

*Anthony Tersine, Assistant Division Chief, American Community Survey Methods, Decennial Statistical Studies Division*

<http://www.census.gov/sdc/www/2tersine.ppt>

### ACS: Over Sampling and Undercounting/Small Multi-unit Enumeration

*Maryann Chapin, Decennial Management Division*

<http://www.census.gov/sdc/www/6chapin.ppt>

### DataFerret (New User)

*Marianne Thrift, Data Integration Division*

<http://www.census.gov/sdc/www/07octannmtg.htm>

### DataFerret (Advanced User)

*William Hazard, Data Integration Division*

The class focused on the use of the Beta DataFerret version that is currently available on the Bureau's website. Bill walked the class through the different features of DataFerret and the class went through hands-on exercises. Advanced training topics included co-tabulations, multiple-variable recodes, multi-instance tabulations, spreadsheet functions, and mapping.

<http://www.census.gov/sdc/www/07octannmtg.htm>

### 2007 Economic Census

*Paul Zeisset, Special Assistant, Economic Planning and Coordination Division*

<http://www.census.gov/sdc/www/4zeisset.ppt>

### CPS Microdata Access

*Greg Weyland, Demographic Surveys Division*

*Stephen Heacock, Housing and Household Economic Statistics Division*

This class focused on the use of the CPS Microdata access system that is found at:

[http://www.census.gov/hhes/www/cpstc/cps\\_table\\_creator.html](http://www.census.gov/hhes/www/cpstc/cps_table_creator.html). The CPS Table Creator gives users the ability to create customized tables from the Current Population Survey's Annual Social and Economic Supplement. In addition, users can generate estimates using their own definitions of income and poverty with [CPS Table Creator II](#). The most recent data available is survey year 2005. CPS Table Creator II is being released to inform the public and has undergone a review more limited in scope than the original Table Creator.

## Using LED on the Map

*Dorothy Paugh, Customer Liaison and Marketing Services Office*

<http://www.census.gov/sdc/www/11led.ppt>

## Thursday October 11, 2007

### Announcements

The morning began with a heartfelt thank you to both Carol Rogers and Richard Rathge for their dedicated service to the network and for the time and effort spent serving on the Steering Committee. In addition, the network thanked Sarah Breshears from Arkansas for her many years of service and dedication to this program. The network wishes Sarah well in her retirement and will sorely miss her. Memory boxes were presented to all as a token of our appreciation.

The date for the spring 2008 meeting will be April 14-16<sup>th</sup> in New Orleans. The meeting will be a kick-off for the 2010 Census. Tentative dates for annual 2008 meeting are October 15-17, 2008.

The Steering Committee has proposed 3 subcommittees, Rural Issues, Communications, and Training. Please stop by this afternoon's subcommittee meeting sessions and express your interest. In addition, there is time on the agenda for networking and interacting with colleagues in the exchange of ideas/projects.

### Economic 2007 Census Update

*Robert Marsek, Economic Planning and Coordination Division*

*Laurie Torene, Economic Planning and Coordination Division*

<http://www.census.gov/sdc/www/4zeisset.ppt>

Laurie discussed the timeline for the upcoming Economic Census. Data collection occurs during most of 2008. All large employers will get a survey form, while a sample of smaller employers will receive forms. Nonemployers do not receive a form, nor do many small businesses. For 2007, the Bureau will offer both paper and electronic reporting.

The Bureau used focus groups to determine how to promote the Economic Census to get employers to respond. They created a new webpage - [www.business.census.gov](http://www.business.census.gov) - for users to see what data are available from the Economic Census that help business, economic development agencies, chambers of commerce, etc. The website has industry snapshots and industry ratios.

The Bureau would like SDCs to help get the word out to businesses; encouraging them to watch for their forms, and to inform businesses of the importance and value of the data from the Economic Census. The Bureau does not have an advertising budget for the Economic Census, so they rely on the people who use the data to get the word out. There are also some changes in the way the Bureau will disseminate the Economic Census. They are planning on disseminating data only via AFF, no CDs, DVDs, or PDFs.

Since more businesses are relying on payroll services, the Bureau is working with the American Payroll Association and other associations/groups to get the word out. They are attending trade association meetings and trying to blanket their information to payroll services companies.

### American Community Survey Update

*Susan Schecter, Chief, American Community Survey Office*

The Bureau shortened the release time-span for the 2006 ACS data (August - September 2007) as compared to the 2005 data release time-line. The Bureau was appreciative that Hawaii noticed a problem with 2006 ACS data prior to the release, eliminating the need to pull data back from the public. Next year there will be both one-year and three-year data that will need to be reviewed prior to release. The Bureau is trying to determine how to do this in a timely and effective way. One option would be to leverage SDC staff earlier in the process.

The ACS website (home page) was redesigned and phase II of the redesign is underway and should be available soon. There was a comparison document prepared for the 2006 ACS that was made available and the Bureau will be putting up similar types of documents for the 2007 data.

The Bureau is testing new questions for the ACS and will brief the SDC network on results at the spring meeting. If approved these questions would appear on the questionnaire in 2009. The proposed 2008 methods panel will have two tests- 1) multi-lingual brochure - 5 languages on the brochure (to stimulate a response prior to a nonresponse visit); and 2) for those nonrespondents they do not have a telephone number match for CATI (Computer Assisted Telephone Interview) follow-up, wanted to do a 3<sup>rd</sup> mailing prior to doing a field visit. There will be three new questions for 2008 that address marital history; health insurance coverage; and veterans - disability rating.

The timeline for the 2010 Decennial/ACS is as follows:

- 3-years before the Decennial - Congress notified of the content
- 2-years before the Decennial - Congress notified of the questions - Decennial and ACS
  - In addition to the wording of each question, lists why each question is asked, etc.
  - Due to congress by March 31, 2008.

*Nancy Torrieri, Chief, Communication, Information, and Education Staff, American Community Survey*  
Multiyear estimates - 2005-2007.

<http://www.census.gov/sdc/www/5torrieri.ppt>

A Federal Register Notice regarding the ACS Multi-Year estimates went out on August 28, 2007 that addressed types of estimates; product types by subject; and release approach. The comment period closed on September 27, 2007, but the Bureau is still welcome to additional comments from stakeholders.

*\*Doug Helmer, Assistant Division Chief for Data Products, American Community Survey*

The Bureau plans to work with data users to develop an appreciation of rural data. The Bureau has agreed to provide, on a regular basis, updates on custom tabulations that have been completed using ACS data to the SDC network.

Doug discussed a joint project that the Bureau has been working on with the Steering Committee regarding rural areas and how to better meet the needs of data users at the substate level. He reviewed the proposed project description that included the delivery of groupings of county data (representing rural statistical areas) with population thresholds of 65,000 or 100,000. The Bureau hopes that this information will be helpful for states in defining the next round of PUMAS. There will be a separate agreement with each state, no funds exchanged, just work in-kind. The project will span over 3-years, starting this fall. The Bureau is starting with aggregations of counties that make up the 65,000 or 100,000 thresholds as suggested by the USDA. They will initially generate the standard ACS data profile for each proposed rural area in participating states. States will provide the Bureau with feedback and analysis on the proposed area and the viability and usefulness of these areas. After reviewing the feedback, the criteria for the 2<sup>nd</sup> year will be determined.

Joint project agreements, maps representing the aggregations of counties for the two population thresholds, the corresponding documents that show how the data were grouped together, timeline of project deliverables, and set of guidelines for the analysis will be zipped and sent to the states. Signed contracts are due to back to the Bureau within a month. The Bureau plans to send this out to the SDC network by the end of October 2007.

*As a result of the questions and answers—*

Concern was expressed that the sample size is too small to do analysis. Reviews have determined that there should be an increase in sample size. The Bureau is developing a budget initiative to request an increase in sample size; which would most likely not occur until 2011 or later, due to the increase in the Bureau's budget needs for the 2010 Census. It was mentioned that APDU (Association of Public Data Users) also supports the increased sample size. If the SDCs can put together a list of reasons why this important and forward them to the Bureau, that may also help reinforce the importance of an increased sample size.

Concern was also expressed regarding interpretation of the ACS data due to the small sample size and large margins of errors. There will need to be caution in using the data when applying for federal grants, especially when using tract level data.

The rural project benefits both the stakeholders and the Bureau. Currently the rural project is only looking at contiguous counties that do not cross state lines. One of the main objectives of the project is to determine "what are the right" groupings.

Data users appear to be confused about when to use the ACS and when to use population estimates. This is why outreach is so important. At the spring SDC meeting, the ACS staff will brief attendees on what the Bureau is doing/planning with regard to education and outreach. The ACS data has a notice on the page that indicates - "not the official population estimates" and told people to "click here" to go to the population estimates page.

Discussion also centered on Q25 that was removed from the ACS. This question was for internal operational/analysis purposes and addressed seasonal residence. Enough data had been collected, so it was removed. The Bureau has a list of 6-pages of evaluation projects for ACS, and they identify which projects should be done each year.

It was also mentioned that prior to this year, every question needed to have a statutory justification and the burden associated with the question had to be assessed. The three new questions for 2008 do not have legislation mandating that they be on the ACS.

The group was also curious as to when ACS would be included into "advanced query" or if a tool that is similar to "advanced query" would be developed for ACS data. The Bureau indicated that they are pursuing the direction of developing a new advanced query tool, but that the tool will not be ready for the next release of ACS data. State legislative district data from ACS will not be available until 2010.

The group inquired about the consistency of questions on the ACS and how the introduction of new questions would affect data tabulation. The Bureau indicated that they are looking at a time phased approach for questions. Content tests in 2011 would affect question changes for 2013.

### **Program Update - Redistricting**

*Cathy McCully, Chief, Census Redistricting Data Office*

The Bureau has completed Phase I of redistricting and as mentioned above, they will release ACS-based state legislative districts in 2010. It is important that all the states are released at the same time.

Cathy addressed the Operational Flow for Redistricting. Her handouts included: Timeline of Activities and sample letter of a response to Director Kincannon regarding participation in Phase 2. The deadline for responding about participation is December 15<sup>th</sup> 2007. The county to be selected in each state will be one that has been realigned by MAF/TIGER Improvement process. Voting districts can follow nonphysical features. This phase of redistricting will use the MAF/TIGER Software and training will start in February 2008. Block boundary and voting district suggestion project will be done as Phase 2. There will be 120 days for each county and the drop dead date is April 1, 2009 for all submissions.

The current plan is for redistricting prototype products to be distributed from Cathy's office. There will be changes to the summary files and the tables. There will also be the inclusion of school districts and the different levels of school districts in addition to tables of housing unit tallies.

If the budget situation improves and they can keep the prototype products on the table the Bureau will also prepare the geography products (TIGER shape files). They also are trying to decide what the map products will look like. Final products are expected to arrive in Jan-March, 2011.

For redistricting Phase 3, the data dissemination plan was strong and the Bureau anticipates preparing products similar to last time. They will ensure that they have the correct leadership and contact



information in place and distribute information to these officials, in addition to posting the data to the web within 24-hours.

### SDC Business Meeting

*Franklin Ambrose, Customer Liaison Marketing Services Office*

Frank reviewed the 2007 State Data Center and Business Industry Data Center Annual Report.

<http://www.census.gov/sdc/www/2006annualreport.htm>

Network notes:

- BLS will not be creating the SPI (State Personal Income) CD any longer and thus it will not be provided to the network.
- The MAF/TIGER Partnership Software will be mailed in October to leads along with a "fictional data CD".

### Concurrent Break-Out Sessions

#### Networking with Other SDCs

##### Using LED on the Map

*Colleen Flannery, Customer Liaison and Market Services Office*

<http://www.census.gov/sdc/www/11led.ppt>

#### Interest Meetings

There was a large turnout for the subcommittee meetings which were held in the same room sequentially. Below is a brief summary of the topics discussed. The 'Chairs' of the subcommittees will be following up on the ideas and suggestions and will be sharing the progress with the Steering Committee.

##### *Rural Issues Subcommittee*

*Richard Rathge, North Dakota SDC*

Discussion centered on the new State/Bureau joint project agreement (see earlier notes\*). Discussion ensued about the timing, who signs the agreement, termination of the agreement, costs involved, purpose, etc. In brief, Nancy Torrieri and Doug Hillmer offered a bit more feedback on the initiative. They indicated that the proposal should be out soon and state representatives who are interested in examining the rural statistical areas developed by the Bureau will have an opportunity to sign a formal MOA. This will commit them to analyzing the rural statistical area for their state and developing a professional paper explaining how the new rural statistical area will help that state in better understanding its rural population. The format for that paper including key points to discuss will be formulated by the Bureau. The key to this initiative is that annual data will be provided for groupings of rural counties largely based on urban influence codes (commonly known as Beale codes). The groupings will either be at 65,000 or 100,000 population. A quick informal tally of states in the room at the time indicated that the majority of states are interested in participating in the program.

##### *Communications Subcommittee*

*Carol Rogers, Indiana SDC*

There was a lively group discussion focused on increasing communications through multiple platforms.

When funds get tight, we need to do things that make others value what we do. In this regard, we can share information that would help each other. One option mentioned was to showcase and list success stories and projects. With budget cuts looming, it is important that we remind people of the value of data. This could be done on the Clearinghouse with a section featuring 'good practices' that states could upload information to share with other states. Another option is to put successes into a database so it could be searchable from Clearinghouse website. It was also mentioned that we should look into <http://Del.icio.us> bookmarking service.

Another topic was about updating the current SDC forum - the SDC listserv - and replacing it with something more dynamic and interactive using newer technology and communication practices while allowing more archiving. Using Blogs where threads divided by topics was among many suggestions.

One suggestion was to hire a 'lobbyist' if the network could come together and fund a person that promotes the SDC network and fight for the network and be our champion. Every state needs to be promoting the importance of the network.

#### **Training Subcommittee**

*Chip Sawyer, Vermont SDC*

This group discussed how to assess and meet the training needs of the network. Sending out surveys was discussed as one suggestion for assessing the needs of the network.

More discussion centered on delivering training. The group discussed the economics and efficiencies of interactive Internet based training. There are two options, training that could be hosted by the Bureau where participants can watch from their computer, or where participants would have to go to a facility to interact with the broadcasted session. Webinars could be recorded and put up as streaming video on the Clearinghouse site.

The group also discussed sharing training and the possibility of considering it as "open source" code. This would allow states to use the training as is or customize it for their own state as needed. States would then be encouraged to put changes back up on the Clearinghouse. A list of trainers would also be good, so states could invite "experts" or "trainers" from other states to attend their local meetings and assist with their training needs.

A suggestion was made to create a calendar section on the forum or Clearinghouse where states can list training sessions being held within their state and/or meetings. In this way, a state could send staff to training that may be closer than DC. CLMSO (Maria) could inform Chip when the affiliate meetings are and those could be posted as well.

The conversation also turned to the annual meetings, where the Bureau provides training for the network. The Steering Committee, working with the CLMSO staff, assist in planning the agenda and with the use of improved communications will come improved training. It was suggested that the Steering Committee look into changing the meeting evaluation process to be an online feedback application.

Discussion turned to the Annual Report that collects information from each member state. It is not outcome based with no measure of impacts and it does not reflect new processes that states operate under. The annual report is used to justify ourselves to the Census Bureau and for them to justify the program. It is difficult to prepare questions that cover everyone since the states are from different backgrounds and thus have different resources available to them (i.e. universities, state agencies, governor offices, etc.) Many states do not have contracts or memorandums of understanding with their affiliates.

## **Friday, October 12, 2007**

### **ACS Research Panel**

#### **ACS Multi-Year Research**

*Jerry Deichert, Nebraska SDC*

<http://www.census.gov/sdc/www/deichert.ppt>

Jerry has been looking at the 3- and 5- year estimates for Omaha using data from 1997 through 2005. From looking at these data there are some questions that have arisen. How do we present the data? The multi-year estimates show a lag if something is growing or slowing, implying that you will always be one-step behind something that is growing or slowing.

If the data are volatile, going up and down, then the 3-year estimates smooth the trend with the same pattern and a phase shift, but the 5-year estimates start to lose the pattern. The differences in the 1-year, 3-year, and 5-year are going to lead to different inferences and will cause confusion with the public, media, and leadership.

Looking at the Margins of Error (MOE), the 1-year MOE changes over time due to sample size. The 3-year MOE are about ½ of the single-year MOE and the MOE for the 5-year estimates are even smaller. For poverty, Jerry is leaning towards using the 3-year estimates because the MOE is ½ of the single-year estimates.

If the MOE is 20-25% of the estimate then he is reluctant to use the estimate. The big question will be how to educate people not to use these numbers as counts and let them know that they are estimates. If you use the 3-year estimates, then every 10 years there will be 3 independent time points. And if you use the 5-year estimates, then every 10 years, there will be 2 independent time points.

### ACS Residency Rules

*Will "Chip" Sawyer*

<http://www.census.gov/sdc/www/sawyer.ppt>

#### Residence Rule and Seasonal Residence

Chip would like to plant a seed for a conversation on the listserve or the forum regarding seasonality. In the ACS the residency rule is greater than or equal to 2 months; while in the Decennial Census the residency rule is where someone lives "most of the time", which is considered to be 6 months or more. The Decennial Census counts primary residents; while ACS could count some temporary or seasonal residents.

The question is not clear on ACS, it could be that someone lived at the residence 2 or more months, is in the middle of their 2 months, or plans to be there 2 months. Chip would like to see the analysis of the ACS old question 25 to help understand what the ACS is collecting.

Some of the positives to the new ACS rule are that it: "kicks" fewer respondents out of the sample (ACS has a good response rate so far); allows reflection of the contribution of seasonal residents to the local economy; eases the impact of college GQs (group quarters) on certain localities. The ACS could also improve data for: community planning, transportation, emergency management, etc.

There is concern about the effect of the income and poverty data from the ACS versus the Decennial Census due to the residency rule and the impact that this will have on both state and federal program eligibility. For example, in Vermont seasonal residents are known to have higher household income levels than the typical primary Vermont resident.

Most state and federal programs were designed based on primary resident data. Analysis needs to be done on the impact on these programs when ACS data are used. Since population is only part of the funding formulas or eligibility requirements, many use other socio-economic data (unemployment rate, poverty, income, etc.), the issue is what impact will the ACS residence rule will have on programs. Some programs that are worth considering are: HUD CDBG (Housing and Urban Development Community Development Block Grant) funds and impact criteria; USDA (United States Department of Agriculture) Rural Development Home Program and others; and state poverty goal related programs.

Originally, ACS was promised to replicate the coverage of the Decennial Census. The big question is does it really meet this original goal and if not, what are the implications.

Some possible changes that could be done in the future to address the residency rules are: change the residence rule back to 6 months; increase funding to do a cross-tab between permanent vs. seasonal units; and analyze the results of question 25.

States with large seasonal units should join together to review and analyze the impact of the ACS.

## Use of ACS in Threshold-based Programs

*Bob Scardamalia - New York SDC*

Warren Brown - Cornell University

ACS Multi-Year Estimates: Impact on State and Federal Programs

<http://www.census.gov/sdc/www/scardamalia.ppt>

The objective of this project was to prepare guidelines for state legislatures and executive agencies that currently use Decennial Census "long form" data. Some concerns are: the impact of errors in the data on the actual allocation of funds; and the provisions that need to be made for an active, continuous interface between legislative program drafters and the statistical community.

In New York there are New York State Empire Zones that are designed based on need - high unemployment and low income. This program gives tax breaks for employers locating in an established zone. The program currently uses the most recent Census data for Census Tracts. In the ACS environment, does this mean Decennial or ACS? With ACS data being released annually, does this mean that the eligibility requirements for these zones could change every year? There needs to be more stability. Sampling errors were ignored with the Decennial Census so we used point estimates, but ACS is publishing standard errors that can no longer be ignored.

Bob and Warren used SF3 data from Rockland County NY, an early pilot location for the ACS, to determine an eligible census tract. New York plans to look at the impact of ACS on eligibility and try to determine if it will be volatile (in/out) over time. Another issue is that when looking at the percent of people whose income is below the poverty level, the margin of errors are large, so how does that get incorporated into program eligibility? Every state will need to check the threshold criteria of programs within their state.

Discussion centered on how this impacts federal and state policies. At the heart of the question is whether changes in eligibility determination will increase the pot of funding for these programs, since more areas may qualify; or if the pot remains the same and more areas are eligible, causing the slices to get smaller.

## Sharing LUCA Resources

*Carol Rogers, Indiana SDC*

United States Census 2010 Indiana - <http://www.census.indiana.edu/>

Carol discussed the popularity and features of Indiana's 2010 Census website which features a LUCA clock which counts down the time left for LUCA. They are starting to compile a list of best practices and when to select which LUCA option. One purpose of the site is to simplify and extract important information from the Census Bureau's site.

Carol is offering an RSS feed from their site and welcomed other states to skin their site. It is a mission of the SDCs to share information and to benefit from each other, so she wants all states to take advantage of what Indiana has done.

Discussion centered on LUCA training materials and that they should be tailored for the audience. Some states have shortened it down to 2 ½ hours. Some states are pushing for Option 3, because of confidentiality.

Vermont also displayed their website. They have developed an email list from training workshops and are also creating a database using statewide E-911. The local governments will be doing error checking.

## County-to-County Migration Data

*John Blodgett, Missouri SDC*

<http://www.census.gov/sdc/www/7blod.ppt>

In order to track migration via tax returns the IRS matches households across consecutive years. Typically the IRS charge for these data. Missouri noticed that the Charlotte Observer created online access to the data, where they display a map and the user drills down to a county of interest and the system gives you a visual and table of the people that moved into the County. Currently the Observer application is still serving up 2004 data.

The Missouri Census Data Center purchased data back to 1999/2000 through 2004/2005. They received a CD with excel files; two files per county and then converted them to a SAS dataset and created a new subdirectory on their website where users can download the data. They also created one dataset per year for in-migration and one for out-migration. Datasets are nice, but in and out flows are better. So they created a report that shows in and out migration by county for all counties in the U.S. The reports are sorted by the county with the highest activity.

The most recent data 2005/2006 has been added, but these data from the IRS do not include the income data as in previous years. The Bureau prepares income data for the IRS and it was thought that there may have been some errors so the income information was omitted, but may be added in a later release. The IRS data are free to government agencies and Ruth Schwartz is the IRS contact.

Caution should be exercised when using the income data and also note the caveats when using the IRS data. Typically, military returns are reflected in the county where they permanently reside which is not necessarily the same as the base. Also, please do not aggregate the data to state totals on the website, as migration flows are only shown for areas with 10 or more.

John indicated that there are links for states to do a direct database query from their website to download data. He also mentioned that there is a good article by Emily Gross, IRS on these data at <http://www.irs.gov/pub/irs-soi/05gross.pdf>

## Proprietary Data

*Carol Rogers, Indian SDC*

Indiana is buying data, exchanging data, and using free data to develop systems, reports, etc. Some sources that were discussed:

Moody's / Economy.com DataBuffet - <http://DataBuffet.com>

Dodge Local/State Construction McGraw-Hill - <http://fwdodge.com/>

Dun & Bradstreet Harris Info Source <http://www.dnb.com/us/> or <http://www.harrisinfo.com/harrisinfo/>

Global Insight - <http://www.globalinsight.com/>

Ocomonitor - <http://www.ocomonitor.com/>

C<sub>2</sub>ER -The Council for Community and Economic Research - formerly ACCRA <http://www.coli.org/>

WISERTrade - <http://www.wisertrade.org/home/index.jsp>

When purchasing data it is important to find out what can you do with it once you buy it (is it still proprietary, etc.). Indiana has a grant to create a system called "Information for Indiana" and has access to data for this system.

DataBuffet.com - has data for bankruptcies; demographics (households, population, and vital statistics); gross county product; income (household, personal); labor markets (household employment, industry employment); real estate; and retail sales. The user needs to determine the quality of the county level data. The system may seem a bit cumbersome in searching for the data that you need. Also, the projections are a trend line and then flat line after a certain point in time. Indiana has used these data to handle data requests, both for historical and current data. The advantage is that all the data is in one place, so it is easier than going to multiple sites to download the information.

Indiana has an analyst that is taking a portion of these data and creating indices of inflow and outflow by regions. Indiana is also evaluating how much of the manufacturing employment is being stimulated up by foreign companies. OCOmonitor ([www.ocomonitor.com](http://www.ocomonitor.com)) has industry reports, source market reports, destination market reports, and company reports. They are also using data from the ACCRA (C<sub>2</sub>ER) Index, which is a cost of living index for metro areas.

Indiana is also working with a metropolitan board of realtors (20 counties) that takes data from Indiana's site and generates profiles by county. With this exchange of information, Indiana University has access to the proprietary data from the real estate board and has summarized sales data, age of housing units that have been sold, etc. Indiana is currently working with the state association to develop a statewide database. Visit The Stats House web page at <http://www.mibor.com/statshouse/>.

WISERTrade also has some free data and other data that needs to be purchased (detail data). This is a good source for "export data".

### **Partnership Program/Local Census Advocacy**

*Bob Scardamalia, New York SDC*

Partnership programs for 2010 Census have not started yet, but many of the SDC network want to continue the momentum following LUCA, especially after developing the working relationships with local governments. What can we do now? School-district programs and complete count committees are obvious ones. But the question remains, what can we start doing today?

Some suggestions were:

- Get buy-in from ethnic/minority coalitions to reach out and spread the message.
- Data centers need bullet points to drop into local markets. League of cities, association of counties, etc.
- Work with CICs to reach out to different ethnic groups.
- Continue to pursue the planning database and get this information out to locals.
- Prepare bullet points for senior citizens groups.
- Emphasize the tie between the funding and programs and the dependency on the Census counts and completeness.
- Can not tie a dollar per household value but can put out aggregate values.
- Emphasize a grant that is based on population and do the math to show what the impact is.
- Work with groups to remind them to fill out the Census. Some states are already getting out the word to seasonal residents to fill out their census form from their home state.
- Encourage the Bureau to do targeted mailouts based on Census data to mail forms in specific languages.
- Put together a message based on the 2000 information. The situation is a bit different due to immigration issues, but use this information as a starting point as the message will be similar.
- One huge marketing tool is that it is "short form" only. All of the reasons of "why to fill out" the census are not appropriate, because they were based on the long-form. Need different reasons to fill out the form.
- Put the message on other agencies forms (DMV, State Tax forms, etc.)

The meeting adjourned at 11:30 am.