

# **State Data Center Program Guidelines**

**Draft Edition**

**For 2018**

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## **Acknowledgements**

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Barbara LaFleur was lead on the revision of the guidelines. The 2017 – 2018 Steering Committee members contributed to the revision of this document. The Steering Committee members are Todd Graham (Committee Chair), Dan Veroff (Vice Chair), Charles Rynerson and Suzan Reagan (Co-Secretaries), Pam Schenker, Allen Barnes, Gregg Bell, Melissa Stefanini, and Jennifer Shultz.

The Customer Liaison and Marketing Services Office is an office in the U.S. Census Bureau Communications Directorate, which comes under the leadership of Stephen Buckner, Associate Director for Communications.

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## **Executive Summary**

The Customer Liaison and Marketing Services Office (CLMSO) within the Data Users Branch (DUB) has created this overview of the State Data Center (SDC) program to help members who are new to the network and to give guidance to current members of the program's operations and their responsibilities. It lays out the program's mission, goals and objectives, and provides information about the structure of CLMSO and the SDC network interactions within the program.

This guide is designed as a general framework for the overall operation of a state's data center program as it relates to the Census Bureau/SDC partnership. It includes sections containing a generic copy of the memorandum of agreement (MOA) with the Census Bureau and a generic copy of the annual report. This guide will be updated as program changes occur.

This guide also provides information about the program's core competencies as laid out in the program's strategic plan. The SDC steering committee and the DUB staff jointly created the strategic plan. DUB is responsible for managing the SDC program.

The Census Bureau formed the State Data Center program in 1978. It is one of the longest and most successful examples of a Census Bureau and state partnership. The main emphasis of the SDC program is to provide an effective vehicle for the dissemination of information and data produced by the Census Bureau to state and local governments and data users within their communities and to provide user feedback to the Census Bureau on data use and operations.

The operation of each data center is predicated on these operational guidelines, although the individual data center operations vary from state to state. Each of the 50 states, island areas (the U.S. Virgin Islands, American Samoa, Guam and the Commonwealth of Northern Mariana Islands), the District of Columbia and Puerto Rico have a designated lead agency. The governor or chief highest elected office of each entity is responsible for naming the lead agency for the SDC's operation and compliance with the program requirements.

The SDC network in each state consists of one lead data center and a network of (coordinating and affiliates) agencies located throughout the state. The SDC program manager in the lead office is responsible for designating one or more of the network agencies as coordinating agencies. Coordinating agencies are often selected based on their specialized knowledge of specific state-run programs and/or their ability to analyze data. In some cases, when a lead agency is designated by the governor's office, but is unable to fulfill all of its duties, it may assign those responsibilities to a coordinating agency. In a few cases, the coordinating agency actually functions as a surrogate lead agency.

Affiliate organizations, also named by the program manager of the lead agency, carry out the state's data dissemination activities at the local level. The number and composition of a state's affiliate network is up to the lead agency, however the Census Bureau only

recognizes a limited number of coordinating and affiliate organizations within each state based on the state's most recent decennial population count.

A steering committee of nine people is elected by the lead agencies in the SDC network to maintain a close working relationship with the Census Bureau and to help communicate the goals of the program to the entire SDC network. The steering committee also is responsible for bring concerns of the network to the Census Bureau. Steering committee members serve on a rotating basis. Each term lasts three years. A person may serve two consecutive terms and then they must rotate off the committee for two years before becoming eligible to serve again. These steering committee members are from the lead and coordinating agencies only. The steering committee has its' own by-laws (See Appendix A).

### **SDC Programs Vision**

As the U.S. Census Bureau's premier local partner, deliver accurate and timely information; prepare and provide training and assistance; assist the bureau in achieving its mission; and foster two-way communications with the bureau on data usability, data user needs and operational issues.

### **SDC Programs Mission**

Empower local data users with understandable, accurate and timely information through the mutually beneficial partnership between the State Data Centers and the Census Bureau.

### **History**

The SDC Program is one of the Census Bureau's longest and most successful associations. This partnership between the Census Bureau and the SDC network helps make census statistics and information available to the public through a network of local affiliate agencies. These agencies are comprised of state, regional and local government agencies, universities, libraries and chambers of commerce. The program began in 1978 with the goal of establishing a lead agency in each state that would become that state's premier local partner and official source of Census data.

The SDC Program continues to integrate changes in technology into the process of facilitating public access to data. Since the creation of the program in 1978, the Census Bureau has pioneered significant changes in the areas of data collection, dissemination and analysis. The SDCs have utilized these changes in the operation of their state networks.

During the first decade of the program, emphasis was placed on these data centers as places the public could go to obtain data. Much of the 1980 Census data was only available in machine-readable formats. State Data Centers were the primary points of access to the data by creating value added products for local governments and general data users. Aggregated statistics were provided from the Census Bureau to the SDCs via

tape and microfiche. The SDCs received the data at no cost before it was released to the public. These releases happened automatically without formal requests. State Data Centers were typically among the only agencies able to process large census files and create value-added products for a wide range of data users.

In the 1990s and 2000s, CD-ROM technology reduced distribution of data via tape. SDCs no longer needed to process tapes or rely on external tape-processing organizations. Later in the decade, data became more readily available on the Internet, both to the SDCs and the public. Although data is more readily available to everyone, there remains a need for technical assistance, as well as a channel for providing feedback to the Census Bureau on the usability of its products.

Since 2010 the SDCs have continued to advise and train local data users on the appropriate uses and interpretations of data. Because the SDCs have specialized knowledge and expertise in the data applications required to assist users, this program expands the Census Bureau's ability to offer data assistance to communities across the country. The SDCs have created on-line virtual world of census data for both their states and local entities.

The SDC steering committee and the DUB have completed a strategic plan that will guide the program over the coming decade. The plan lays out the goals and objectives for the SDC program. (See Appendix H)

## **Partnership Goals and Objectives**

The day-to-day operation of the data center program varies within each state. The following section is meant to assist SDCs in the general operation of the program and provide a structure to ensure that the program requirements are met and that we are meeting the needs of data users.

### **Goal 1 - Program Management:**

Manage the SDC Program as a productive and efficient partnership between the Census Bureau and the SDC Network.

#### **Objectives:**

**SDC Administrative:**

Manage the SDC program by empowering lead agencies.

**SDC Local Stakeholders Communications:**

Support SDC local stakeholders by providing the most up-to-date information on the Census Bureau and related federal statistical agencies' activities and products.

**SDC Census Bureau Communication:**

Maintain effective two-way communication between the SDC network and the Census Bureau.

CLMSO Administration and Communication:  
Effectively administer the SDC program through timely and accurate communication with the lead agencies

## **Goal 2 - Data Dissemination:**

Improve knowledge of, access to and usage of data.

### Objectives:

#### SDC Dissemination:

Work with the Census Bureau to maintain the SDC network that covers every state's member geography and that connects and assists stakeholders to make sure Census Bureau data are accessible.

Assist and educate stakeholders in using data/tools/technologies (e.g. website, apps, and devices).

Provide feedback and recommendations to CLMSO.

Develop and share products within the SDC network and with other users.

Maintain a website that provides current information.

Provide data for good decision making at the local level.

#### CLMSO Dissemination:

Ensure SDC program has access to and is informed about data releases and products, services and materials.

## **Goal 3 - Local Expert:**

To be recognized as the local expert in data analysis, technical assistance and custom product development.

### Objectives:

#### SDC Local Expert:

Gain and disseminate knowledge of Census Bureau tools to facilitate proper use of Census Bureau statistics.

Provide technical advice to stakeholders in understanding and using Census Bureau data/products/systems/tools.

#### CLMSO Local Expert:

Provide free and unlimited training, technical documentation, materials, tools and support to the SDCs as the Census Bureau's "premiere local partner."

#### **Goal 4 - Promotion:**

Encourage use of Census Bureau products and programs.

##### Objectives:

###### SDC Promotion:

Work to maximize stakeholder involvement and knowledge of local Census events (e.g. Census Bureau programs, campaigns and promotions).

###### CLMSO Promotion:

Promote the SDCs as the Census Bureau's premiere local partner within as well as outside the Bureau.

#### **Goal 5 - Training and Education:**

Provide instruction to ensure Census Bureau data are used in innovative, effective and appropriate ways.

##### Objectives:

###### SDC Training and Education:

Educate and instruct local stakeholders on the availability and use of Census data and statistical information.

###### CLMSO Training and Education:

Ensure that the SDCs have timely and targeted training on Census Bureau products, programs and initiatives.

#### **Goal 6 - Assistance with Census Programs:**

Enhance the quality of Census Bureau's surveys and products.

##### Objectives:

###### SDC Assistance with Programs:

Be an integral part of Census Bureau programs and objectives.

###### CLMSO Assistance with Programs:

Ensure that SDC Program has the opportunity to work hand-in-hand with Census Bureau programs.

## **Goal 7 - Build a Thriving Network:**

Capitalize on the long-term partnership between the SDCs and the Census Bureau to accomplish common goals and objectives.

### Objectives:

SDC participation in meetings:

Facilitate SDC representation and participation in the annual meeting.

SDC participation in meetings using alternative/interactive formats:

Ensure high levels of participation in alternative meeting formats such as virtual meetings, conference calls and webinars.

CLMSO participation in meetings:

Promote continuity, community and partnership between the SDC network and the Census Bureau.

CLMSO participation in alternative meeting formats:

Provide the means for all SDC network members to communicate, collaborate, be trained or learn about Census statistics and processes on an ongoing basis.

## **Core Competencies of the State Data Center Program**

In 1998, the State Data Centers and the Census Bureau adopted the first program core competencies. These core competencies defined a minimum level of state participation and ensured effective operation of the program. Over the years, these competencies have been updated to keep pace with changing technology, data user needs and the needs of the Census Bureau. These core competencies originate from the strategic plan. Each SDC lead organization has been and will be, responsible for the implementation of these competencies within their network.

The core competencies are defined in greater detail in the memorandum of agreement (MOA). The methods of measurement for each core competency are located in the MOA for each state and include:

### **I. Program Administration**

SDC - The lead organization will, among their other responsibilities provide staff and budget to support the program and act as managers to ensure that the administrative functions herein are performed.

CLMSO - Effectively administer the SDC program through timely and accurate communication with the lead agencies and providing staff and budget to carry out the SDC program.

## **II. Data Dissemination**

SDC - The SDC network will provide Census data, information, tools, technology and knowledge to its members and local stakeholders.

CLMSO - Ensure that the SDC program has access to and is informed about, Census Bureau data releases, products, services and materials.

## **III. Data Research and Analysis, Expertise, Technical Assistance and Consultation**

SDC - As the premier local partner, the SDC network will provide technical expertise and assistance, consultation and materials on Census Bureau products and programs.

CLMSO - Support the SDCs as the Census Bureau's "premiere local partner." Provide free and unlimited training, technical documentation, materials, tools and support to the SDCs so that they might be recognized locally for their expertise and technical assistance with Census statistics.

## **IV. Promotion**

SDC - Network members will promote Census Bureau products, programs and services, assist with operational support as necessary and appropriate, provide updates to local stakeholders and encourage the use of products and participation in censuses, surveys and other programs.

CLMSO - Promote the SDCs as the Census Bureau's "premiere local partners" (inside as well as outside the Bureau).

## **V. Training and Education**

SDC - The lead and/or coordinating agency will provide training for network affiliates. SDC network members will educate and provide information and support to local stakeholders and other data users on the availability and use of Census data and statistical information and share best practices among network members.

CLMSO - Ensure that the SDCs have timely and targeted training on Census Bureau products, programs and initiatives.

## **VI. Assistance**

SDC - The SDC network will be an integral part of Census programs and objectives by serving as the premier local partner for Census surveys and programs, by participating in design, input and testing and

providing feedback to the Bureau on products, programs, technologies and services.

CLMSO - Ensure that the SDC program has the opportunity to work hand-in-hand with Census Bureau programs, offering their unique guidance and feedback.

## **VII. Participation and Presence**

SDC - The lead or delegate will participate in the annual meeting and be a part of regular strategic planning processes.

CLMSO - Maintain timely communication with each SDC lead organization. Capitalize on the long-term partnership between the SDCs and the Census Bureau to accomplish common goals and objectives.

## **Organizational Structure of the SDC Program**

### **Customer Liaison and Marketing Services Office (CLMSO)**

CLMSO is the administrative home of the SDC program within the Census Bureau, and is part of the Communications Directorate.

CLMSO is composed of four branches: the Data Users Branch (DUB); the Education, Training and Dissemination Branch; the Customer Services Center Branch; and Statistics in Schools. The SDC program is managed by DUB.

### **Steering Committee**

The SDC steering committee is made up of nine people who are elected by the SDC program managers from the lead offices. The steering committee members generally come from the SDC lead offices, but individuals from coordinating agencies also are eligible to run for election to the committee. A member of the Census Information Centers (CIC) also sits on the committee as a non-voting liaison between the SDC program and the CIC program.

The CIC program is a sister program to the SDC network. It is a partnership between the Census Bureau and community-based organizations, colleges and non-profits, that provides underserved communities with access to Census Bureau data, products, training, etc.

The SDC steering committee sets priorities, offers direction and provides guidance to the greater SDC network. It serves a useful function as the ongoing liaison between the Census Bureau and the network.

The SDC network has its own website, the SDC Clearinghouse website. This site is a place where anyone in the SDC network – leads, coordinating agencies or affiliates, can share their work as it relates to the program. Additionally, the University of California at Berkeley manages a listserv to allow network members to have discussions among themselves or to post questions that other network members can answer.

The steering committee uses “tree states” as their structure for communicating with the network. Each steering committee member has a collection of states with whom he/she communicates. This structure provides each steering committee member with a manageable-sized group to communicate with, whether sharing information that comes out of the steering committee meeting or encouraging participation in an upcoming webinar or requesting feedback on a committee request. Please see the tree state list in Appendix C for your specific tree state lead.

Sometimes SDC leads have to respond to steering committee questions about a topic of interest. Some steering committee members use an online survey to gather responses. Others use email. In either case, the steering committee uses the results of these interactions to respond to the Census Bureau on behalf of the network.

The process for electing new members to the steering committee is detailed in the bylaws. Each year, three members rotate off the committee and three new members are elected to replace them.

See the bylaws in Appendix A for specific information about eligibility and term limits. In general, members must represent a lead or coordinating agency. A term of office is three years. Members may sit for two consecutive three-year terms, after which time, a committee member must step down for at least two years before being eligible to run for another term. Term limits were adopted in the 1990s to encourage a diversity of people to run for a place on the steering committee.

The new term of office for steering committee members begins during the annual training meeting. The steering committee selects its chair, vice-chair and two co-secretaries. Please see Appendix B for the history of steering committee members.

The steering committee meets monthly via conference call and twice a year for an extended series of meetings over the course of three days. Of the two steering committee meetings, currently, one is conducted virtually as a webinar; the second is held in person immediately preceding the annual training conference.

### **Lead Agency**

Every SDC program must have one lead agency an employee of that agency designated as the manager of the program. The lead agency is appointed by the governor’s office of the state, commonwealth or territory. Lead agencies are invariably a state government office, a library or a university. The Census Bureau requires the lead agency to provide a supporting signature on the recurring MOA. Some states require that the governor sign the MOA; other states allow the SDC program manager from the lead office to sign the MOA. That signatory decision rests with the states, not with the Census Bureau.

However, the Census Bureau does require that the governor authorize any change in the lead agency designation.

The lead agency administers the SDC program for its state. The lead agency is responsible for ensuring that all SDC core competencies are met. (Please see the section of this document about core competencies.) Coordinating and affiliate partners may agree to provide some of the core competencies, but the lead agency makes sure all required activities are provided. SDC activities may be totally underwritten by their host agency, or SDC activities within a state may be operated in a cost-recovery or reimbursable mode.

The lead agency is required to report their activities in the annual report to DUB each year. Currently, upon receipt of the annual report by the stated deadline and as the budget permits, CLMSO authorizes one SDC network member from each State (including the District of Columbia, Puerto Rico and the Island Areas) and for each non-lead SDC Steering Committee member to attend the annual training conference in Suitland.

The statewide organization of the SDC affiliate networks vary from state to state, but usually involves a major state executive or planning agency, a major state university department and/or the state library. These organizations determine the exact structure of the individual state program. States must have a lead and an affiliate network.

### **State Data Center Networks**

SDCs must have an affiliate network and may also have coordinating agencies, but these are not required. Agencies invited to be coordinating and affiliate agencies in the SDC network within a state are determined by the lead agency. The Census Bureau does not select a state's coordinating or affiliate agencies, although it has the right to review a selection when a new coordinating or affiliate agency is being considered. The agencies invited to be part of the network are those whose central mission already incorporates some aspect of the services centrally associated with the SDC program. They must be government, academic or nonprofit organizations whose goal is to provide data and information at little or no cost to the public. (Reasonable fees may be charged for cost recovery and/or for customized products.) Coordinating and affiliate agencies are encouraged to provide training and technical assistance to the public on how to access and use Census statistics.

### **Coordinating Agencies**

Generally, coordinating agencies are agencies whose scope of service is statewide in nature. They work in partnership with the lead to be responsible for some of the core competencies of the program. They may be state agencies of the executive branch, units within universities, state libraries or some other type of statewide nonprofit organization. Again, coordinating agencies are a recommended component of each state's SDC program.

The number of coordinating agencies a state has is determined jointly by the lead agency and the Census Bureau. Occasionally, a state and the Census Bureau have had to

renegotiate the number or the composition of that state's coordinating agencies. The typical number is between one and three coordinating agencies.

## **Affiliates**

A network of affiliate agencies that are nonprofit organizations is a required component of the SDC program. Examples are public libraries, local planning agencies, or units within colleges or universities. Affiliate agencies might be organizations that serve a particular geographic area or they might be organizations that have a particular subject matter clientele. In either case, affiliates are familiar with the needs of their particular service area and with the data resources that are pertinent to that area or clientele.

The affiliate mission is to provide localized assistance and services to data users. They must have some established means of communicating with data users and have demonstrated the capacity to deliver local data user services. Among affiliate activities are such things as making referrals to other organizations in the network, cosponsoring seminars and training sessions, or offering expanded data services such as GIS or data analysis.

A state's SDC organization should have affiliates that cover the entire geographic area of the state and possibly also specific stakeholders. New affiliates ordinarily are not invited from areas where one already exists unless the new center will provide new services or the area is large enough to require another affiliate. Major metropolitan areas might have more than one local affiliate.

Affiliates may be disengaged from the program for nonperformance or upon their own request. The lead agency should renew its affiliate agreements as often as its own MOA is renewed with the Census Bureau. This renewal of agreements allows each party to regularly reconsider its obligations and the benefits of participation in the SDC program.

## **Number of Affiliates per State**

The number of affiliates allowed per state to maintain the exclusiveness of premier local data expert is based on the population of the state:

Population	SDC Affiliates
Less than 5 million	50
5 to 10 million	60
10 to 20 million	70
20 million or more	90

SDC leads can ask for an amendment to the above figures. It has been determined that the SDC will email the current DUB chief and justify the need to increase the above limits. The SDC may only increase this number by as many as five affiliates.

## **Responsibilities**

### **Steering Committee**

The Steering Committee's responsibilities are detailed in its bylaws appearing in Appendix A of this document.

### **Customer Liaison and Marketing Services Office (CLMSO)**

1. CLMSO develops a Memorandum of Agreement for each state in the SDC program. The MOAs are customized for each state to include state-specific language or legal statutes, as needed.
2. CLMSO distributes notifications about new statistical releases and other electronic products are sent to leads for statewide distribution.
3. SDC leads are the entities within the network to officially be granted access to embargoed material. The SDC lead can ask for their coordinating agencies to have access to embargo to the DUB office. The SDC lead can petition their tree state steering committee member regarding embargo access for affiliate agencies. Both affiliate and coordinating agencies can be granted embargo access if there is a strong need. The Census Bureau's Public Information Office (PIO) is responsible for the embargo policy and enforcement. Rules governing the embargo policy must be agreed to before access is granted.
4. CLMSO communicates regularly with the SDC network via the listserv and telephone calls to the lead agencies.
5. CLMSO works with the SDCs through the Steering Committee on issues directly affecting the SDCs. The Committee and the Census Bureau meet via telephone conference call each month.
6. CLMSO supports SDC efforts to exchange ideas with one another. This includes sponsoring an annual training conference.
7. CLMSO maintains a database of the names, email addresses and location address of lead, coordinating and affiliate organizations. The SDC lead is responsible for submitting to CLMSO all changes in any network agency's information.
8. CLMSO will post to its website links to notable data products or graphics generated by the SDCs.
9. CLMSO consolidates SDC annual reports into one report and distributes that report to the SDCs Steering Committee and appropriate divisions/offices in the Census Bureau. CLMSO also reports the summary information at the annual meeting of the SDCs.

10. CLMSO works with the appropriate Census Bureau offices to ensure SDC participation in the planning and promotion of various censuses, surveys and dissemination of data.

### **Lead Organizations**

The lead organization provides staff and budget to carry out SDC-related activities. As part of that role, the lead agrees to do several things.

1. The lead is the principal contact to the Census Bureau among its state network partners.
2. The lead is responsible for overseeing, completing and executing the MOA between the state and the Census Bureau.
3. The lead is responsible for ensuring all core competencies are met in its state. These tasks can be accomplished by combining the efforts of the coordinating and/or affiliate agencies.
4. The lead is responsible for submitting an annual report to CLMSO that documents their networks' program activity for one year.
5. The lead is responsible for facilitating communication among its partners in the state with the Census Bureau, steering committee and other SDCs.
6. The lead identifies, recruits and coordinates the state's affiliate agencies for the SDC Program.
7. Every lead must be on the email list that DUB uses to provide updates. This allows the Census Bureau to keep the network informed about updates to Census products, services, national meetings, training, etc.
8. The lead (or a member of the SDC network) carries out promotional activities such as newsletters, presentations or speeches.
9. The State Data Center lead, coordinating and/or affiliate agencies should maintain data files, software, maps and other reference materials in a location that is accessible to the public. It is not necessary that all these services are available to the public in the same place, but the lead is responsible for organizing the network so that the public has physical access to Census information.
10. Maintain and notify CLMSO of any changes to the current list of coordinating and affiliate organizations.

## **Coordinating Agencies**

Details of coordinating agencies' responsibilities are worked out within each state's program. A coordinating agency normally fulfills some aspects of the core competencies for the entire state.

## **Affiliate Agencies**

Affiliates promote SDC services locally. Additionally, affiliates provide feedback to the lead agency and the Census Bureau on data products, user needs and the functioning of the program. Affiliates agree to carry out certain responsibilities in this regard.

1. Affiliates submit annual reports to the SDC lead.
2. Affiliates maintain Census Bureau data for their service area. Using this data, affiliates provide assistance in locating and using the data for their local areas.
3. When a local affiliate agency is not able to help an SDC client, the affiliate should give the client a referral to other organizations or the lead agency in the network. Therefore, it is important that affiliate agencies are aware of each other capabilities.
4. Affiliates may sponsor or co-sponsor seminars or training sessions.
5. Affiliates may offer expanded data services such as data analysis.

## **Regional Offices**

The six Census Bureau Regional Offices are not signatories to the SDC program MOA. They do not have a legal responsibility to the program. However, regional offices have always offered great support to SDC members. The following are examples of those interactions:

1. The Partnership and Geography staffs in the regional offices serve as contacts for technical support.
2. A regional office may offer support for SDC annual affiliate meetings. This provides an opportunity for the SDCs to understand how they can utilize the services of the regional office. It also provides an opportunity for the regional office to answer questions, provide statistical assistance and generally strengthen the relationship between themselves and the SDCs in their state.
3. The regional office may provide training for SDC affiliates and other members of the data user community. When appropriate, regional office staff may speak at SDC functions.
4. To allocate resources most efficiently and minimize duplication of service to customers, regional offices and SDC agencies are encouraged to exchange schedules of their planned activities, such as workshops, presentations, conferences and meetings. In addition, the regional offices will notify SDCs of meetings with state government officials in their state.

## **Appendix A – Steering Committee By-Laws**

### ***Amendment to the State Data Center Program Steering Committee By-Laws***

*Delete everything in the State Date Center Program Steering Committee By-Laws,*

*Revised: August 28, 2014 – Ratified: October 23, 2014*

*And insert:*

### **STATE DATA CENTER PROGRAM STEERING COMMITTEE BY-LAWS**

Revised August 7, 2017 – Proposed Effective Date: October 1, 2017

#### **1. NAME**

1.1 The name of the organization shall be the State Data Center Program Steering Committee (*hereafter referred to as “the Steering Committee”*).

#### **2. OBJECTIVES**

2.1 To represent the interests of the member agencies of the State Data Center Program.

2.2 To advise the Census Bureau on the administration and operation of the State Data Center Program.

2.3 To assist the Census Bureau in planning the operations, subject content and data products of future decennial censuses, the American Community Survey, economic censuses, censuses of governments and various other surveys and programs.

2.4 To assist the Census Bureau in the development and testing of software applications.

2.5 Together with the Census Bureau, to plan and conduct the Annual State Data Center Conference and Steering Committee meetings.

2.6 To improve the flow of information and ideas among the individual member agencies and between the member agencies and the Census Bureau.

2.7 To ensure that the existence of the Steering Committee shall not discourage, hinder, or preclude direct contact between individual member agencies and the Census Bureau or any other organization.

#### **3. MEETINGS / CONFERENCE CALLS**

##### **3.1 Steering Committee Meetings**

3.1.1 The Steering Committee shall conduct a meeting either in person or via conference call at a minimum of once per month unless rescheduled or canceled by the Chairperson.

### 3.2 Network Meetings

- 3.2.1 The Steering Committee in conjunction with the Census Bureau will plan the format, agenda, and dates for an annual meeting of the Lead organizations.

### 3.3 Annual Business Meeting

- 3.3.1 The Chairperson of the Steering Committee, in cooperation with the Census Bureau, will conduct a business meeting for the State Data Center Program at least once per calendar year.
  - 3.3.1.1 Participation at the annual business meeting is open to any representative from the State Data Center network.
  - 3.3.1.2 The purpose of the business meeting is to brief the network on activities and to receive input from the network.

## **4. ELIGIBILITY, TERM, VACANCIES, AND ELECTION**

### 4.1 Eligibility

- 4.1.1 Representatives of the State Data Center Lead Agency and Coordinating Agencies are eligible for nomination to the Steering Committee as a representative of their member geography.
  - 4.1.1.1 Member geographies include member states, District of Columbia, Puerto Rico, and the Island Areas that have a signed Memorandum of Agreement for participation in the State Data Center Program on file at the Census Bureau (hereafter referred to as “the member geographies”).
- 4.1.2 The Steering Committee membership shall be limited to one representative per member geography.
  - 4.1.2.1 A representative is not limited to a member geography’s primary contact. Any employee of a Lead or Coordinating Agency is eligible.
  - 4.1.2.2 In the event that more than one person runs for the Steering Committee from a member geography, or a member geography is already represented on the Steering Committee, only one person may serve at a time.
- 4.1.3 Eligibility status for the Steering Committee is contingent on the elected representative’s continued employment by the named agency from which the representative was elected.

### 4.2 Term

- 4.2.1 The Steering Committee shall consist of nine (9) members elected at large from the member geographies.
- 4.2.2 Elected members of the Steering Committee shall serve a term of three (3) years. Steering Committee members’ terms end and begin at the start of the first Steering Committee meeting after the election results are finalized.
- 4.2.3 The elected members may serve two (2) consecutive three (3) year terms.

- 4.2.4 The Steering Committee members are required, after serving two (2) consecutive three (3) year terms, to wait for two (2) consecutive years prior to running for re-election.
- 4.2.5 If the immediate past Chairperson is ineligible to run for the Steering Committee or is not re-elected to the Steering Committee, he/she may serve in an advisory position to the Steering Committee with the majority vote of the full Steering Committee, for the year immediately following the end of his/her term.

#### 4.3 Vacancies

- 4.3.1 In the event that a currently serving member's eligibility status changes, that member shall vacate his/her seat on the Steering Committee. (The term shall be considered "interrupted" until the vacated seat has been filled and the interrupted term has run out).
- 4.3.2 If a vacancy occurs on the Steering Committee, it shall be filled by the unelected candidate receiving the next highest number of votes in the most recent completed election of Steering Committee members. This candidate will be assigned to serve the interrupted term of the vacated seat. (This procedure of filling a vacated seat on the Steering Committee shall be referred to hereafter as "filled by default"). This process continues until the list of past election candidates is fully exhausted.
  - 4.3.2.1 An exception to rule 4.3.2 of the Steering Committee By-Laws occurs if the next highest vote receiver is from the same member geography as an existing Steering Committee member. If this is the case, then this unelected candidate would be passed over for the vacated seat on the Steering Committee.
- 4.3.3 If no unelected candidate as described in rule 4.3.2 of the Steering Committee By-Laws is available, then the Steering Committee Chairperson shall appoint a person who is eligible to serve the remainder of the interrupted term. The Chairperson's appointment shall be ratified by a majority vote of the members of the Steering Committee. (This procedure of appointing an eligible person to a vacated seat on the Steering Committee shall be referred to hereafter as "filled by appointment").
- 4.3.4 Whether a vacated seat on the Steering Committee is filled by default or is filled by appointment, the time spent completing the interrupted term does not count towards that Steering Committee member's eligibility to run for (2) consecutive full terms after the interrupted term has run out.

#### 4.4 Election

##### 4.4.1 Nomination and Ballot Preparation

- 4.4.1.1 All members of the Steering Committee will serve to promote the benefits of serving on the Steering Committee and distribute information about the committee's duties and obligations. Information will be distributed to all eligible agencies and volunteers will be solicited to stand for election. The nomination process for available Steering Committee seats shall commence by November 1st.

4.4.1.2 The deadline for nominations for the Steering Committee shall be December 31st of each year.

4.4.1.2.1 In the event that there are an insufficient number of names to fill all the vacancies, the Steering Committee may extend the period for nominations or accept late nominations, providing the election is completed by January 31st.

4.4.1.3 At least two members of the Steering Committee who are not running for election will be appointed by the Steering Committee Chairperson by December 15th of each year to coordinate and conduct the election of Steering Committee members by electronic ballot. These members are responsible for validation of the ballot and verification of the results.

4.4.1.4 The ballot will be prepared following the close of nominations.

4.4.1.5 The ballot must contain at least as many names as there are vacancies to be filled. Nominees must be eligible for elections, consistent with rule 4.1 of the Steering Committee By-Laws.

4.4.1.6 The ballot will be distributed to all State Data Center Leads, with instructions for voting.

#### 4.4.2 Voting Process

4.4.2.1 Each of the fifty-six (56) State Data Center Leads shall be eligible to cast one (1) vote for each open seat on the Steering Committee.

4.4.2.2 The annual election will be held during the month of January and conclude prior to the end of the month. State Data Center Leads will have no fewer than ten (10) business days to vote.

4.4.2.3 Votes shall be tabulated and the results transmitted to the Steering Committee Chairperson after verification of the results by the appointed Steering Committee members as per rule 4.4.1.3, within five (5) business days after the voting period ends.

4.4.2.4 Steering Committee open seats will be filled in descending order of the number of votes received by each candidate who is eligible to serve on the Steering Committee.

4.4.2.4.1 An exception to rule 4.4.2.4 of the Steering Committee By-Laws occurs if the descending order results in multiple candidates from the same member geography. If this is the case, then the candidate(s) with the fewest number of votes would be passed over.

4.4.2.5 In the event of a tie vote for the final open seat, a plurality vote of the current Steering Committee will decide the candidate to fill the seat.

## 5. OFFICERS

5.1 The members of the Steering Committee shall choose annually from among their number a Chairperson, a Vice-Chairperson, and Co-Secretaries.

5.2 These offices shall be determined by plurality vote of the Steering Committee during its first meeting after the election results are finalized.

5.3 The terms of the newly elected officers will begin at the meeting identified in rule 5.2 of the Steering Committee By-Laws.

5.4 The Duties of the Chairperson:

- 5.4.1 The Chairperson will preside at Steering Committee meetings and the Annual Conference for the State Data Center program.
- 5.4.2 The Chairperson shall sign all Steering Committee correspondence on behalf of the Steering Committee.
- 5.4.3 The Chairperson can appoint any member of the Steering Committee to specific tasks or projects as necessary.
- 5.4.4 The Chairperson will appoint, from the Steering Committee members, a liaison to the Census Information Center Steering Committee.

5.5 The Vice-Chairperson will perform the duties of the Chairperson in the absence of the Chairperson and shall succeed the Chairperson should the office be vacated before the end of the Chairperson's term.

5.6 The Co-Secretaries will record the minutes of the Steering Committee meetings and shall report the proceedings to the membership. The Co-Secretaries shall annually provide the State Data Center network with a document that includes an annual review of Steering Committee activities for the year.

- 5.6.1 The annual review document shall be provided to the State Data Center network prior to the next election of Steering Committee members.

5.7 The immediate past Chairperson of the Steering Committee may serve in an advisory position (as outlined in rule 4.2.5 of the Steering Committee By-Laws) to the Steering Committee, for the year immediately following the end of their term.

5.8 The appointed liaison to the Census Information Center Steering Committee will attend their conference calls and report to the Census Information Center Steering Committee on the activities of the State Data Center Program.

## **6. GUSTAFSON AWARD**

6.1 The Gustafson Award was established in 2012 to memorialize a State Data Center program colleague, Randy Gustafson from the Tennessee SDC who also served on the SDC Steering Committee. The Gustafson Award was created in his memory to annually honor an individual (or individuals) of the SDC network for their outstanding contributions to the SDC program.

6.2 By October 1st of each year, the Chairperson of the Steering Committee shall appoint a minimum of two members of the Steering Committee to solicit nominations for the Gustafson Award.

6.3 By November 1st, the Chairperson of the Steering Committee shall appoint a group of no less than three (3) and no more than five (5) individuals to review the nominations for the Gustafson Award and make a recommendation to the full Steering Committee for the recipient of the annual award. This group may include any combination of members of

the Steering Committee and other individuals who are employed by either a State Data Center Lead or Coordinating agency. The recommendation to the full Steering Committee shall be accomplished by November 30th.

6.4 An announcement of the winner(s) of the Gustafson award shall be made in conjunction with the results of the election for service on the Steering Committee.

## **7. COMMITTEES**

7.1 The Chairperson of the Steering Committee may appoint temporary or standing committees as deemed necessary and appropriate to accomplish the goals of the State Data Center Program.

7.2 Representatives of the State Data Center Lead Agency and Coordinating Agencies and Affiliates are eligible to serve on committees.

## **8. NETWORK MEMBER ISSUES**

8.1 Individuals who are employed by a member agency may bring any issue(s) before the Steering Committee by directing written or electronic communication to any member of the Steering Committee. Such communication shall be circulated to all Steering Committee members.

8.2 The individual member originating the communication shall be informed, in writing or by electronic communication, of receipt of the communication and the activity undertaken by the Steering Committee.

## **9. AMENDMENTS**

9.1 Amendments to these By-Laws shall be adopted by two-thirds of the members of the Steering Committee and subject to ratification by a majority vote of State Data Center Lead Agencies. Each State Data Center Lead Agency shall be responsible for one vote per member geography.

9.2 If an amendment fails to meet the two-thirds adoption by the Steering Committee, the amendment may be returned to the Sub-Committee/Work Group with a written recommendation from the Steering Committee for resolution of issues, which may also include a request for re-submission to the Steering Committee for adoption of the amendment.

9.3 The State Data Center Lead Agency representative responsible for voting shall be encouraged to directly contact other State Data Center Agencies in their member geography for input on casting the vote for that member geography.

## **Appendix B - Steering Committee Membership History**

### **1983-84**

Eileen Barr (MN)  
Mike Batutis (NY)  
Francine Ewing Stephenson (NC)  
Harley Lingerfelt (OK)  
Sam McReynolds (VT)

Reid Reynolds (CO)  
Terry Schnure (CT)  
Bill Schooling (CA)  
Bonnie Young (TX)

### **1984-85**

Eileen Barr (MN)  
Mike Batutis (NY)  
Francine Ewing Stephenson (NC)  
Harley Lingerfelt (OK)  
Sam McReynolds (VT)

Reid Reynolds (CO)  
Terry Schnure (CT)  
Bill Schooling (CA)  
Bonnie Young (TX)

### **1985-86**

Eileen Barr (MN)  
Mike Batutis (NY)  
Francine Ewing Stephenson (NC)  
Harley Lingerfelt (OK)  
Sam McReynolds (VT)

Reid Reynolds (CO)  
Terry Schnure (CT)  
Linda Gage (CA)  
Larry Rosen (MI)

### **1986-87**

Eileen Barr Olson (MN)  
Linda Gage (CA)  
Mike Lettre (MD)  
Patty Madson (MA)  
Sam McReynolds (VT)

Karen Paterson (LA)  
Larry Rosen (MI)  
Terry Schnure (CT)  
Susan Szaniszlo (TX)

### **1987-88**

Eileen Barr Olson (MN)  
Sarah Breshears (AR)  
Linda Gage (CA)  
Mike Lettre (MD)  
Patty Madson (MA)

Karen Paterson (LA)  
Larry Rosen (MI)  
Terry Schnure (CT)  
Susan Szaniszlo (TX)

### **1988-89**

Eileen Barr Olson (MN)  
Sarah Breshears (AR)  
Linda Gage (CA)  
Mike Knight (WA)  
Mike Lettre (MD)

Karen Paterson (LA)  
Patricia Roberts (MT)  
Larry Rosen (MI)  
Terry Schnure (CT)

**1989-90**

Sarah Breshears (AR)  
Dee Dykstra (SD)  
Linda Gage (CA)  
Mike Knight (WA)  
Mike Lettre (MD)

Karen Paterson (LA)  
Patricia Roberts (MT)  
Larry Rosen (MI)  
Terry Schnure (CT)

**1990-91**

Sarah Breshears (AR)  
DeVee Dykstra (SD)  
Linda Gage (CA)  
Connie Hughes (NJ)  
Mike Knight (WA)

Karen Paterson (LA)  
Patricia Roberts (MT)  
Carol Rogers (IN)  
Terry Schnure (CT)

**1991-92**

John Blodgett (MO)  
Sarah Breshears (AR)  
DeVee Dykstra (SD)  
Linda Gage (CA)  
Connie Hughes (NJ)

Mike Knight (WA)  
Karen Paterson (LA)  
Patricia Roberts (MT)  
Carol Rogers (IN)

**1992-93**

David Birkholz (MN)  
John Blodgett (MO)  
Sarah Breshears (AR)  
Linda Gage (CA)  
Connie Hughes (NJ)

Mike Knight (WA)  
Reid Reynolds (CO)  
Patricia Roberts (MT)  
Carol Rogers (IN)

**1993-94**

David Birkholz (MN)  
John Blodgett (MO)  
Sarah Breshears (AR)  
Linda Gage (CA)  
Connie Hughes (NJ)/Reid Reynolds'

Mike Knight (WA)  
Patricia Roberts (MT)  
Carol Rogers (IN)  
Diane Shoop (PA)

**1994-95**

David Birkholz (MN)  
John Blodgett (MO)  
Ron Crouch (KY)  
Linda Gage (CA)  
Carol Rogers (IN)

Bob Scardamalia (NY)  
Diane Shoop (PA)  
Eric Swanson (MI)  
Annette Watters (AL)

**1995-96**

David Birkholz (MN)  
John Blodgett (MO)  
Val Conti (MA)  
Linda Gage (CA)  
Carol Rogers (IN)

Bob Scardamalia (NY)  
Diane Shoop (PA)  
Eric Swanson (MI)  
Annette Watters (AL)

**1996-97**

David Birkholz (MN)  
Val Conti (MA)  
Linda Gage (CA)  
Carol Rogers (IN)  
Bob Scardamalia (NY)

Diane Shoop (PA)  
Eric Swanson (MI)  
Jane Traynham (MD)  
Annette Watters (AL)

**1997-98**

David Birkholz (MN)  
Linda Gage (CA)  
Patricia Roberts (MT)  
Carol Rogers (IN)  
Bob Scardamalia (NY)

Diane Shoop (PA)  
Eric Swanson (MI)  
Jane Traynham (MD)  
Annette Watters (AL)

**1998-99**

Beverly Daly (KY)  
Sue Ebetsch (IL)  
Linda Gage (CA)  
Patricia Roberts (MT)  
Carol Rogers (IN)

Bob Scardamalia (NY)  
Diane Shoop (PA)  
Jane Traynham (MD)  
Annette Watters (AL)

**1990-2000**

John Blodgett (MO)  
Bev Daly (KY)  
Sue Ebetsch (IL)  
Lin Nary (NV)/Rebecca Picaso (CO)  
Bob Scardamalia (NY)

Diane Shoop (PA)  
Jane Traynham (MD)  
Jeff Wallace (OK)  
Annette Watters (AL)

**2000-01**

David Birkholz (MN)  
John Blodgett (MO)  
Bev Daly (KY)  
Sue Ebetsch (IL)  
Rebecca Picaso (CO)

Pam Schenker (FL)  
Diane Shoop (PA)  
Jane Traynham (MD)  
Jeff Wallace (OK)

**2001-02**

David Birkholz (MN)  
John Blodgett (MO)  
Bev Daly (KY)  
Linda Gage (CA)  
Rebecca Picaso (CO)

Richard Rathge (ND)  
Carol Rogers (IN)  
Jane Traynham (MD)  
Jeff Wallace (OK)

**2002-03**

David Birkholz (MN)/Dan Veroff (WI)  
John Blodgett (MO)  
Sue Ebetsch (IL)  
Linda Gage (CA)  
David Joye (NJ)

Rebecca Picaso (CO)  
Richard Rathge (ND)  
Carol Rogers (IN)  
Bob Scardamalia (NY)

**2003-04**

John Blodgett (MO)  
Sue Ebetsch (IL)  
Linda Gage (CA)  
David Joye (NJ)

Carol Rogers (IN)  
Bob Scardamalia (NY)  
Dan Veroff (WI)  
Annette Watters (AL)

**2004-05**

John Blodgett (MO)  
Sue Ebetsch (IL)  
Linda Gage (CA)/Barbara Ronningen (MN)  
Richard Rathge (ND)  
Carol Rogers (IN)

Bob Scardamalia (NY)  
Jane Traynham (MD)  
Dan Veroff (WI)  
Annette Watters (AL)

**2005-06**

Bob Scardamalia (NY)  
Jane Traynham (MD)  
Dan Veroff (WI)  
Annette Watters (AL)  
Carol Rogers (IN)

Barbara Ronningen (MN)  
Julie Hoang (CA)  
Xan Wedel (KA)  
Richard Rathge (ND)

**2006-07**

Xan Wedel (KS)  
Annette Watters (AL)  
Richard Rathge (ND)  
Carol Rogers (IN)  
Julie Hoang (CA)

Pam Schenker (FL)  
Pam Harris (MT)  
Bob Scardamalia (NY)  
Jane Traynham (MD)

**2007-08**

Xan Wedel (KS)  
Pam Harris (MT)  
Bob Scardamalia  
Dan Veroff  
Julie Hoang (CA)

Annette Watters (AL)  
Pamela Schenker (FL)  
Jane Traynham  
Barbara Ronningen

**2008-09**

Dan Veroff (WI)  
Pamela Schenker (FL)  
Barbara Ronningen (MN)  
Jane Traynham (MD)  
William “Chip” Sawyer (VT)

Annette Watters (AL)  
Julie Hoang (CA)  
Leonard Gaines (NY)  
Sue Copella (PA)

**2009-10**

Dan Veroff (WI)  
Julie Hoang (CA)  
Jane Traynham (MD)  
Will “Chip” Sawyer (VT)  
Barbara Ronningen (MN)

Amy Bittner (WY)  
Leonard Gaines (NY)  
Sue Copella (PA)  
Pamela Schenker (FL)

**2010-11**

Bob Coats (NC)  
Allen Barnes (AZ)  
Clifford Holley (MS)  
Sue Copella (PA)  
Pamela Schenker (FL)

Amy Bittner (WY)  
Mary Craigle (MT)  
Kristen Rohanna (CA)  
Randy Gustafson (TN)

**2011-12**

Bob Coats (NC)  
Allen Barnes (AZ)  
Kristen Rohanna (CA)  
Pamela Schenker (FL)  
Will “Chip” Sawyer (VT)

Amy Bittner (WY)  
Clifford Holley (MS)  
Mary Craigle (MT)  
Sue Copella (PA)

**2012-13**

Bob Coats (NC)  
Allen Barnes (AZ)  
Mary Craigle (MT)  
Sue Copella (PA)  
Charles Rynerson (OR)

Amy Bittner (WY)  
Clifford Holley (MS)  
Pamela Schenker (FL)  
Terry Jackson (GA)

**2013-14**

Bob Coats (NC)  
Allen Barnes (AZ)  
Mary Craigle (MT)  
Sue Copella (PA)  
Charles Rynerson (OR)

Amy Bittner (WY)  
Clifford Holley (MS)  
Pamela Schenker (FL)  
Terry Jackson (GA)

**2014-15**

Bob Coats (NC)  
Allen Barnes (AZ)  
Mary Craigle (MT)  
Sue Copella (PA)  
Dan Veroff (WI)

Amy Bittner (WY)  
Todd Grahman (MN)  
Patty Becker (MI)  
Charles Rynerson (OR)

**2015-16**

Bob Coats (NC)  
Allen Barnes (AZ)  
Mary Craigle (MT)  
Suzan Reagan (NM)  
Dan Veroff (WI)

Amy Bittner (WY)  
Todd Grahan (MN)  
Pam Schenker (FL)  
Charles Rynerson (OR)

**2016-17**

Bob Coats (NC)  
Allen Barnes (AZ)  
Mary Craigle (MT)  
Suzan Reagan (NM)  
Dan Veroff (WI)

Amy Bittner (WY)  
Todd Grahan (MN)  
Pam Schenker (FL)  
Charles Rynerson (OR)

**2017-18**

Todd Graham (MN)  
Charles Rynerson (OR)  
Gregg Bell (AL)  
Melissa Stefanini (TN)  
Suzan Reagan (NM)

Allen Barnes (AZ)  
Dan Veroff (WI)  
Jennifer Shultz (PA)  
Pam Schenker (FL)

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## **Appendix C – 2017-2018 Steering Committee with Tree States**

### **Todd Graham (MN)**

Metropolitan Council  
390 Robert Street North  
Saint Paul, MN 55101  
P 651-602-1322  
F 651-602-1674  
Responsible for the following states –  
AL, AZ, FL, MN, NM, OR, PA, TN, WI

### **Allen Barnes (AZ)**

Arizona Department of Administration  
Office of Employment and Pop Statistics  
100 N. 15th Avenue, Room 440  
Phoenix, AZ 85007  
P 602-771-1155  
F 602-771-1207  
Responsible for the following states –  
AS, CO, IN, MI, MS, RI

### **Gregg Bell (AL)**

Institute for Rural Health Research  
College of Community Health Sciences  
The University of Alabama  
Box 870326  
Tuscaloosa, AL 35487-0221  
P 205-348-1690  
Responsible for the following states –  
AL, AK, HI, IA, NE, UT, WY

### **Suzan Reagan (NM)**

Bureau of Business and Economic Research  
Business and Industrial Data Center  
MSCO6 3510, 1 University of New Mexico  
Albuquerque, NM 87131-001  
P 505-277-3038  
F 505-277-2773  
Responsible for the following states –  
AR, MO, NJ, NM, NY, OK, SC

### **Charles Rynerson (OR)**

Population Research Center  
Portland State University  
506 SW Mill – URBN 780C  
Portland, OR 97207  
P 503-725-5157  
F 503-725-5199  
ryneron@pdx.edu  
Responsible for the following states –  
CA, GU, IL, KS, MP, WA

### **Pam Schenker (FL)**

Office of Economics and Demographic  
Research  
The Florida Legislature  
111 W. Madison St. Suite 574  
Tallahassee, FL 32399-6588  
P 850-487-1402  
F 850-922-6436  
Responsible for the following states –  
DC, FL, MD, NH, VI, WV

### **Jennifer Shultz (PA)**

PA SDC Institute of State and Regional  
Affairs  
777 W Harrisburg Pike  
Harrisburg, PA 17105  
P 717-948-6690  
F 717-948-6306  
Responsible for the following states –  
DE, ID, MA, NV, ND, PA, SD

### **Melissa Stefanini (TN)**

Boyd Center for Business and  
Economic Research  
University of Tennessee  
713 Stokely Management Center  
916 Volunteer Boulevard  
Knoxville, Tennessee 37996-0570  
P 865-974-6070  
F 865-974-3100  
Responsible for the following states –  
LA, MT, NC, OH, PR, TX

### **Dan Veroff (WI)**

Applied Population Laboratory  
Department of Rural Sociology  
University of Wisconsin, Madison  
316E Ag Hall -1450 Linden Drive  
Madison, WI 53706-1522  
P 608-265-9545  
F 608-262-6022  
Responsible for the following states –  
CT, GA, KY, ME, VA, VT, WI

## **Appendix D - States By Year of Entry into SDC Program**

### **1978**

Alabama  
Arizona  
Louisiana  
North Carolina

### **1979**

Arkansas  
Delaware  
Georgia  
Indiana  
Maryland  
Montana  
New York  
Ohio  
Virginia  
West Virginia  
Wisconsin

### **1980**

California  
Connecticut  
Idaho  
Illinois  
Iowa  
Kentucky  
Mississippi  
Missouri  
New Jersey  
New Mexico  
Oklahoma  
Oregon  
Tennessee  
Texas  
Utah  
Washington

### **1981**

Colorado  
District of Columbia  
Massachusetts  
Michigan  
Nebraska  
North Dakota  
Pennsylvania  
Rhode Island  
South Carolina  
South Dakota  
Vermont

### **1982**

Alaska  
Florida  
Kansas  
Minnesota  
Nevada  
New Hampshire  
Puerto Rico

### **1983**

Hawaii  
Maine

### **1986**

Wyoming

### **1987**

Virgin Islands

### **1999**

American Samoa

## **Appendix E- State Data Center Program Lead Organizations**

### **1. Alabama**

Center for Business and Economic Research  
University of Alabama  
149 Bidgood Hall, Box 870221  
Tuscaloosa, AL 35487-0221  
Susannah Robichaux  
(205) 348-3781  
Fax (205) 348-2951  
scrobichaux@cba.ua.edu

### **2. Alaska**

Census & Geographic Information  
Network Research & Analysis  
Alaska Department of Labor  
1111 West 8<sup>th</sup> Street  
P.O. Box 115501  
Juneau, AK 99811-5504  
Liz Brooks  
(907) 465-58970  
Fax (907) 465-2101  
liz.brooks@alaska.gov  
<http://almis.labor.state.ak.us/>

### **3. American Samoa**

Department of Commerce  
Economic Development Division  
A. P. Lutali Executive Office Building  
Pago Pago, AS 96799  
Mine Timoteo  
(684) 633-5155  
Fax (684) 633-4195  
Mine.timoteo@doc.as

### **4. Arizona**

Arizona Department of Administration  
Office of Employment and Population  
Statistics  
100 N. 15th Avenue, Room 440  
Phoenix, AZ 85007  
Allen Barnes  
(602) 771-1155  
Fax (602) 771-1207  
Allen.barnes@azdoa.gov

### **5. Arkansas**

State Data Center  
Univ. of Arkansas-Little Rock  
2801 South University  
Little Rock, AR 72204  
Phyllis Poche  
(501) 569-8530  
Fax (501) 569-8538  
pnpoche@ualr.edu

### **6. California**

State Census Data Center  
Department of Finance  
915 L Street, 8th floor  
Sacramento, CA 95814-3706  
Demographer  
Walter Schwarm  
(916) 323-4086 X2529  
Fax (916) 327-0222  
Walter.Schwarm@dof.ca.gov

### **7. Colorado**

Division of Local Government  
Colorado Department of Local Affairs  
1313 Sherman Street, Room 521  
Denver, CO 80203  
Adam Bickford  
(303) 864-7753  
Adam.bickford@state.co.us

### **8. Connecticut**

Connecticut State Data Center  
Map and Geographic Information Center  
– MAGIC  
University of Connecticut Libraries  
369 Mansfield Road, Unit 2005M  
Storrs, CT 06269-2005  
Michael Howser  
(959)-200-3471  
Fax (860)-246-0436  
michael.howser@uconn.edu

**9. Delaware**

Delaware Office of Management and Budget  
122 William Penn Street  
Suite 301  
Dover, DE 19901  
Connie Holland  
(302) 739-3090  
Fax (302) 739-5135  
Connie.haolland@state.de.us

**10. District of Columbia**

DC Office of Planning  
State Data Center  
1100 4<sup>th</sup> Street, SW, Suite E650  
Washington, DC 20024  
Joy Phillips  
(202) 442-7630  
Fax (202) 442-7638  
Joy.phillips@dc.gov

**11. Florida**

Florida Department of Economic Opportunity  
Labor Market Statistics  
State Census Data Center  
MSC G-020  
107 E. Madison Street  
Tallahassee, FL 32399-4111  
Jerry Heijkoop  
(850) 245-7259  
FAX (850) 245-7201  
Jerry.Heijkoop@deo.myflorida.com

**12. Georgia**

Planning Research and Evaluation Division  
Executive Office  
270 Washington Street, SW  
Atlanta, GA 30334  
Meaghan Ryan  
(404) 656-3800  
Fax (404) 656-7916  
meaghan.ryan@opb.georgia.gov

**13. Guam**

Guam State Data Center  
Bureau of Statistics and Plans  
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## **Appendix F: Memorandum of Agreement**

MEMORANDUM OF AGREEMENT  
ESTABLISHING A JOINT PROJECT  
BETWEEN THE  
BUREAU OF THE CENSUS  
UNITED STATES DEPARTMENT OF COMMERCE  
AND THE «capst» OF «capnamest»  
Agreement No.05-13-MOU-01  
January 1, 2014 - December 31, 2020

### **PARTIES**

- 1.1 This document constitutes an agreement between the U.S. Census Bureau, the U.S. Department of Commerce, and the government of the «capandsm» of «fullst» hereafter known as State Data Center (SDC) which is a public organization.

### **AUTHORITIES**

- 2.1 The Census Bureau has authority to participate in the State Data Center (SDC) program with the «capandsm» of «fullst» under:
  - (1) Title 15 U.S.C. Section 1525, the Commerce Department's Joint Project Authority, which provides that the Census Bureau may enter into joint projects with nonprofit, research, or public organizations on matters of mutual interest, the cost of which is equitably apportioned;
  - (2) Title 13 U.S.C. Section 8, which provides authority for the Census Bureau to undertake joint statistical projects.

### **PURPOSE**

- 3.1 Pursuant to this agreement, the Census Bureau and the SDC will undertake a joint working relationship with the SDC as the premier local partner. The Census Bureau's SDC program was established in 1978 to create an effective vehicle for the dissemination of information and data produced by the Census Bureau to state and local governments. By entering into this agreement, the SDC, as the premier local partner and an official source of Census Bureau data for «fullst», will be provided with Census Bureau data products, technical support, and training at no cost. The Census Bureau may charge for special products or tabulations.

- 3.2 This relationship is necessary and essential to further the mission of the Commerce Department in that it will provide the public with local access to Census Bureau data. This relationship develops a partnership for the promotion and support of all Census Bureau programs. This partnership provides the Census Bureau with a nationwide network of organizations to provide governments, businesses, and organizations with the data for use in planning and decision-making. And finally, this partnership increases the effectiveness of the Census Bureau's public outreach because the «fullst» SDC has access to and the responsibility to serve the local data user community in a much more extensive capacity than the Census Bureau.
- 3.3 The Census Bureau's SDC Program is administered by the Customer Liaison and Marketing Services Office (CLMSO), within the Communications Directorate.

#### MUTUAL INTEREST OF THE PARTIES

- 4.1 This joint partnership is of mutual interest to the parties because the partnership's objectives involve data dissemination, data use, education and support of Census Bureau programs. The Census Bureau and the «fullst» SDC share objectives and provide support to one another for each of these objectives.
- 4.2 The Census Bureau regards this partnership as integral to its mission. The «fullst» SDC also gives high priority in this partnership to data dissemination and providing technical assistance in the use of Census Bureau data. The SDCs make the Census Bureau data more widely accessible to data users.
- 4.3 In terms of the data collection aspect of this agreement, the Census Bureau benefits because data centers help obtain the cooperation of their users at the time of data collection by applying local knowledge of the community to data collection activities. The SDC benefits by being an official source of Census Bureau data. This enables the Census Bureau to allow the SDC access to data on an embargo basis, that is, prior to the Census Bureau's release of data to the general public. The «fullst» SDC and its communities benefit through the SDCs involvement in improving data for economic development, social and economic planning, policymaking and governance. In addition, the SDC also receives specialized training from Census Bureau experts on significant programs such as the decennial census, the economic census, and the American Community Survey.
- 4.4 The SDCs participate in development, review and evaluation of Census Bureau programs, software and products. Through their local networks, they also provide a structured feedback mechanism. The information that the SDCs provide becomes key factors in the appearance, media presentation and quality of the Census Bureau data products.

## RESPONSIBILITIES OF THE PARTIES

- 5.1 The SDCs are the premier local partner with the Census Bureau for their areas and are an official repository of Census Bureau data. They assist in data dissemination, use, education and support of Census Bureau programs.
- 5.2 Both parties will work to strengthen the relationship, by promoting training and communication, and leveraging limited resources. This may include webinar-based training as well as conference opportunities. CLMSO will host an annual meeting for the Lead organizations. This meeting will include training, presentations and a business meeting. Each state will be allowed to send one delegate. This delegate can be the state lead or their designee.
- 5.3 The State Data Center organizations will be required to perform the following:
  - 5.3.1 Program management - The Lead organization will, among their other responsibilities provide staff and budget to support the program and act as managers to ensure that the administrative functions herein are performed. The Lead organization also has the responsibility of ensuring that the functions listed in 5.3.1 through 5.3.7 are performed by either the Lead organization or the appropriate Coordinating or Affiliate organization, or by arranging to have another data center handle functions other than those designated as administrative in nature. In addition, every Lead organization must subscribe to the SDC list serve, complete the annual report, maintain a signed MOA, and maintain effective communication on their activities with CLMSO.
  - 5.3.2 Data dissemination - The SDC network will provide Census data, information, tools, technology and knowledge to its members and local stakeholders. The SDC will assist stakeholders in the use of these products and share products developed by network members where appropriate.
  - 5.3.3 Data research and analysis, expertise, technical assistance, and consultation - As the premier local partner, the SDC network will provide technical expertise and assistance, consultation, and materials on Census Bureau products and programs.
  - 5.3.4 Promotion - SDC network members will promote Census Bureau products, programs, and services, assist with operational support as necessary and appropriate, provide updates to local stakeholders, and encourage the use of products and participation in censuses, surveys, and other programs.
  - 5.3.5 Training and Education - The Lead and/or Coordinating Agency will provide training for network affiliates. SDC network members will educate and provide information and support to local stakeholders and other data users on the availability and use of Census data and statistical information, and share best practices among network members.

- 5.3.6 Assistance - The SDC network will be an integral part of Census programs and objectives by serving as the premier local partner for Census surveys and programs, by participating in design, input and testing, and providing feedback to the Bureau on products, programs, technologies and services.
  - 5.3.7 SDC Participation and Presence - The Lead or delegate will participate in the annual meeting and be a part of regular strategic planning processes. SDC network members will assist in developing Census Bureau programs and products. Each SDC will maintain a web presence and contact information to local stakeholders.
- 5.4 The Census Bureau, through the CLMSO, agrees to:
- 5.4.1 Program management –effectively administer the SDC program through timely and accurate communication with the lead agencies, and providing staff and budget to carry out the SDC program. CLMSO will maintain and publish a current list of SDC leads and their contact information, and maintain current Memoranda of Agreement with each of the lead organizations. CLMSO will keep the SDC leads informed about developments in programs and publications at the Census Bureau, as well as provide opportunity for feedback from the SDCs. CLMSO will publish an annual report at the end of each fiscal year based on the activity of the SDC network.
  - 5.4.2 Data dissemination – ensure that the SDC program has access to, and is informed about, Census Bureau data releases, products, services and materials. CLMSO will assist the SDCs leads by providing them and their affiliate members training in the use of Census data tools and products. CLMSO will offer each SDC lead organization the opportunity to sign up for access to Census Bureau embargoed statistics. Embargoed statistics do not include information that is protected by Title 13 confidentiality restrictions. The process for gaining access to embargoed statistics is ultimately controlled by the Census Bureau's Public Information Office (PIO), and those SDCs which are granted access to these statistics must agree to the rules that govern that process.
  - 5.4.3 Local expert –support the SDCs as the Census Bureau's "premiere local partner." Provide free and unlimited training, technical documentation, materials, tools, and support to the SDCs so that they might be recognized locally for their expertise and technical assistance with Census statistics.
  - 5.4.4 Promotion - promote the SDCs as the Census Bureau's premiere local partners (inside as well as outside the Bureau). Maximize and support SDC network members' involvement in, and knowledge of, local Census activities, particularly Census Bureau programs, campaigns and promotions. Seek operational support from SDCs where appropriate. Assist the network members to promote Census products and services.

- 5.4.5 Training and education – ensure that the SDCs have timely and targeted training on Census Bureau products, programs and initiatives. Coordinate training sessions (whether in-person or webinar) with regional offices and SDC members on how to acquire, use and interpret data. Work with SDCs to develop useful instructions.
- 5.4.6 Assistance with Census Programs – ensure that the SDC program has the opportunity to work hand-in-hand with Census Bureau programs, offering their unique guidance and feedback. CLMSO will seek opportunities for the SDCs to participate in the design, input and testing of Census products, programs, surveys and services.
- 5.4.7 Thriving Network - maintain timely communication with each SDC lead organization. Capitalize on the long-term partnership between the SDCs and the Census Bureau to accomplish common goals and objectives. CLMSO will invite the lead or delegate to participate in the annual training conference and to be a part of the strategic planning process. Support the efforts of the data centers to exchange ideas with other data centers. Encourage each SDC to maintain a web presence as a premiere Census Bureau partner.

#### 5.5 Regional Office Support of State Data Centers

- 5.5.1 Regional Offices will communicate, at least once each year, with the SDCs in their regions through conference calls, e-mail, and/or meetings to promote a good working relationship with their data dissemination partners.

#### 5.6 Resources

- 5.6.1 Each party will provide the necessary resources, to the extent such resources are available, and to carry out all the activities associated with this partnership.

#### 5.7 Monitoring and Evaluation

- 5.7.1 The SDC Lead organization will provide an annual report. Lead organizations that do not report their program activity by the specified date are subject to Census Bureau imposed program restrictions. These restrictions may include, but are not limited to, restricting or terminating the SDCs access to embargoed information, and/or CLMSOs payment for attendance at the SDC annual training conference.
- 5.7.2 The Census Bureau will use the annual reports to determine if the SDCs are meeting the terms of this agreement. In the event that one of the SDCs is not performing one or more of the responsibilities listed above, the Census Bureau will first seek to correct the deficiencies through targeted training and support activities. If these actions do not result in compliance

with the terms of this agreement, the SDC and the CLMSO relationship may be terminated.

The CLMSO liaisons will have at the minimum, quarterly contact via telephone, face-to-face visits, or email with SDC Lead organizations.

#### 5.8 Annual Reports

- 5.8.1 The CLMSO will prepare the SDC network annual report for distribution to the SDCs regarding SDC and Census Bureau activity.

#### EQUITABLE APPORTIONMENT OF COSTS

- 6.1 The costs of this activity are equitably apportioned between both parties.

#### CONTACTS

- 7.1 The contacts of each party to this agreement are:
- 7.1.1 Authorized Signator, SDC Lead Designee, and any others who need to sign it
  - 7.1.2 Chief, Customer Liaison and Marketing Services Office, Census Bureau
- 7.2 The parties agree that if there is a change regarding the information in this section, the party making the change will notify the other party in writing of such change.

#### PERIOD OF AGREEMENT AND MODIFICATION/TERMINATION

- 8.1 This agreement becomes effective on or after January 1, 2014 or on the date signed by all parties. The agreement will terminate on December 31, 2020, but may be amended at any time by mutual agreement of the parties.
- 8.2 Any party may terminate this agreement by providing 60 days written notice to the other party. In the event this agreement is terminated, each party will be solely responsible for the payment of any expenses it has incurred. This agreement is subject to the availability of funds.

#### OTHER PROVISIONS

- 9.1 Should disagreement arise on the interpretation of the provisions of this agreement or amendments and/or revisions thereto, that cannot be resolved at the operating level, the area(s) of disagreement will be stated in writing by each party and presented to the other party for consideration. If agreement on the interpretation is not reached within thirty days of the date of the letter that informs the party of the disagreement, the parties will forward the written presentation of the disagreement to respective higher officials for

appropriate resolution. Under the Inspector General Act of 1978, as amended, 5 U.S.C. App. 3, a review of this agreement may be conducted at any time. The Inspector General of the Department of Commerce, or any of his or her duly authorized representatives, shall have access to any pertinent books, documents, papers and records of the parties to this agreement, whether written, printed, recorded, produced, or reproduced by any mechanical, magnetic or other process or medium, in order to make audits, inspections, excerpts, transcripts, or other examinations as authorized by law.

---

[signature]

(current division chief's name)  
Chief, Customer Liaison and Marketing Services  
Office Bureau of the Census  
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Washington, DC 20233-0500

---

[date]

---

[signature] Signator (may be multiple)

---

[date]

---

SDC Lead

«HON». «FNAME» «LNAME»  
«AGENCY»  
«DIVISON»  
«STI» «RM\_STE»  
«ST3»  
«CITY», «STATE» «zip4»  
«EMAIL»

---

[date]

---

[signature]

## **Appendix G – Regional Offices Listings**

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**CUSTOMER LIAISON AND  
MARKETING SERVICES OFFICE  
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STATE DATA CENTERS (SDC)  
STRATEGIC PLAN**

DRAFT

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## **FUTURE**

### **2.1 VISION**

2.1.1 As the U.S. Census Bureau's premier local partner, deliver accurate and timely information; prepare and provide training and assistance; assist the Bureau in achieving its mission; and foster two-way communications with the Bureau on data usability, data user needs and operational issues.

### **2.2 MISSION**

2.2.1 Empower data users with understandable, accurate, and timely information through the mutually beneficial partnership between the State Data Centers (SDCs) and the Census Bureau.

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## **PARTNERSHIP GOALS / OBJECTIVES / MEASURES**

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### **3.1 PROGRAM MANAGEMENT GOAL: Manage the SDC Program as a productive and efficient partnership between the Census Bureau and the SDC Network.**

#### **3.1.1 SDC ADMINISTRATIVE OBJECTIVE: Manage the SDC program by empowering lead agencies.**

##### 3.1.1.1 Complete Memorandum of Agreement (MOA).

3.1.1.1.1 MEASURE: SDC lead designated on a signed MOA for every state or equivalent as per the date in the document.

##### 3.1.1.2 Administer an affiliate program, which may include a Business and Industry Data Center (BIDC) component, for the network including recruitment, coordination, hosting annual meetings, training, and evaluations.

3.1.1.2.1 MEASURE: Completion of SDC annual report documenting activities (e.g. meetings, webinars, training sessions, publications, number of employees and their functions, funds spent for SDC/BIDC activities, number of organizations by type, etc.) for the calendar year (Jan.1 thru Dec. 31) by each SDC lead.

##### 3.1.1.3 Provide the staff and budget to carry out the network activities.

3.1.1.3.1 MEASURE: Completion of SDC annual report documenting activities (e.g. meetings, webinars, training sessions, publications, number of employees and their functions, funds spent for SDC/BIDC activities, number of organizations by type, etc.) for the calendar year (Jan. 1 thru Dec. 31) by each SDC lead.

#### **3.1.2 SDC LOCAL STAKEHOLDERS COMMUNICATION OBJECTIVE: Support SDC local stakeholders by providing the most up-to-date information on the Census Bureau and related federal statistical agencies' activities and products.**

##### 3.1.2.1 Keep abreast of new Census developments.

3.1.2.1.1 MEASURE: Provide monthly, or more frequently as needed, updates of Census Bureau data and developments to local stakeholders. The total number of these updates will be documented in the SDC annual report.

##### 3.1.2.2 Provide effective communication with the SDC local stakeholders.

3.1.2.2.1 MEASURE: Provide monthly, or more frequently as needed, updates of Census Bureau data and developments to local stakeholders. The total number of these updates will be documented in the SDC annual report.

#### **3.1.3 SDC CENSUS BUREAU COMMUNICATION OBJECTIVE: Maintain effective two-way communication between the SDC network and the Census Bureau.**

##### 3.1.3.1 Report to the Census Bureau on accomplishments.

3.1.3.1.1 MEASURE: Completion of SDC annual report documenting activities (e.g. meetings, webinars, training sessions, publications, number of employees and their functions, funds spent for SDC/BIDC activities, number of organizations by type, etc.) for the calendar year (Jan. 1 thru Dec. 31) by each SDC lead.

- 3.1.3.2 Provide feedback to the Census Bureau on improvements and enhancements to Census products and tools from local stakeholders and networks.
  - 3.1.3.2.1 MEASURE: Provide quarterly updates to the Census Bureau on stakeholder activities using an agreed upon process for reporting.
- 3.1.3.3 Provide an updated list of lead, coordinating, and affiliate agencies to the Census Bureau on a regular basis.
  - 3.1.3.3.1 MEASURE: Provide monthly updates to the Census Bureau.

**3.1.4 Customer Liaison and Marketing Services Office (CLMSO) ADMINISTRATION AND COMMUNICATION OBJECTIVE: Effectively administer the SDC program through timely and accurate communication with the lead agencies.**

- 3.1.4.1 ADMINISTRATIVE
  - 3.1.4.1.1 Provide staff and budget to carry out the SDC program.
    - 3.1.4.1.1.1 MEASURE: Update organizational chart as needed to reflect current staff and provide information reflecting current budget situation.
  - 3.1.4.1.2 Maintain and publish a current lead, coordinating, and affiliate agencies contact list.
    - 3.1.4.1.2.1 MEASURE: Update current lead, coordinating, and affiliate agencies contact list on a monthly basis.
    - 3.1.4.1.2.2 MEASURE: Update as needed on-line profile of SDC network including lead or coordinating contacts and their network IT capabilities based on the MOA and the annual report, and/or periodic surveys.
  - 3.1.4.1.3 Maintain current MOAs.
    - 3.1.4.1.3.1 MEASURE: SDC lead designated on a signed MOA for every state or equivalent as per the date in the document.
  - 3.1.4.1.4 Maintain a detailed profile (e.g. machines/platforms/software used) of the current network members.
    - 3.1.4.1.4.1 MEASURE: Update the current lead/coordinating profile contact list on a monthly basis.
    - 3.1.4.1.4.2 MEASURE: Regularly update or more frequently as needed on-line profile of SDC network including lead and coordinating contacts and their network IT capabilities based on MOA and annual report and/or periodic surveys.
- 3.1.4.2 CLMSO COMMUNICATION
  - 3.1.4.2.1 Provide current information to the SDCs on new developments and opportunities for SDCs to participate and contribute towards the new developments.
    - 3.1.4.2.1.1 MEASURE: Communicate Census news and developments to the SDC Steering Committee within three business days and to the SDC network within five business days.
    - 3.1.4.2.1.2 MEASURE: Respond to SDCs feedback (e.g. contact person, webinar updates, etc.) within one business day.

- 3.1.4.2.2 Provide and promote summaries of SDC activities and accomplishments.
  - 3.1.4.2.2.1 MEASURE: Within two months of the annual reporting deadline, summarize the SDC annual report, documenting activities (e.g. meetings, webinars, training sessions, publications, number of employees and their functions, funds spent for SDC/BIDC activities, number of organizations by type, etc.) for the calendar year (Jan. 1 thru Dec. 31) by each SDC lead.
- 3.1.4.2.3 Alert the SDCs to the availability of materials on the website.
  - 3.1.4.2.3.1 MEASURE: Alerts will be sent out within one business day of materials being made available on the website.

## **3.2 DATA DISSEMINATION GOAL: Improve knowledge of, access to and usage of data.**

### **3.2.1 SDC DISSEMINATION OBJECTIVE: Work with the Census Bureau to maintain the SDC network that covers every state's member geography and that connects and assists stakeholders to make sure Census Bureau data are accessible.**

- 3.2.1.1 MEASURE: SDC lead designated on a signed MOA for every member geography as per the date in the document.

### **3.2.2 SDC DISSEMINATION OBJECTIVE: Assist and educate stakeholders in using data/tools/technologies (e.g. website, apps, devices).**

- 3.2.2.1 Provide customers with data, information, tools, technology and the knowledge on how to use the data appropriately.
  - 3.2.2.1.1 MEASURE: Report total number of requests by type of requesting organization and document in the SDC annual report.

### **3.2.3 SDC DISSEMINATION OBJECTIVE: Provide feedback and recommendations to CLMSO.**

- 3.2.3.1 MEASURE: Provide periodic updates on Census Bureau data and developments from local stakeholders using an agreed upon process for reporting.

### **3.2.4 SDC DISSEMINATION OBJECTIVE: Develop and share products within SDC Network and, when the product is truly exemplary, with other users: member geographies, Census Bureau, etc. Maintain a website that provides current information.**

- 3.2.4.1 Prepare data products for distribution based on Census Bureau data.
  - 3.2.4.1.1 MEASURE: Report total number of developed products and document in the SDC annual report.
- 3.2.4.2 Disseminate materials received from the Census Bureau to SDC local stakeholders.
  - 3.2.4.2.1 MEASURE: Report total number of requests by types of requesting organization and document in the SDC annual report.

**3.2.5 SDC DISSEMINATION OBJECTIVE: Provide data for good decision making at the local level.**

3.2.5.1 MEASURE: Provide monthly, or more frequently as needed, updates on Census Bureau data and developments from local stakeholders using the agreed upon process for reporting.

3.2.5.2 MEASURE: Report total number of educational efforts conducted and document in the SDC annual report.

**3.2.6 CLMSO DISSEMINATION OBJECTIVE: Ensure SDC program has access to and is informed about data releases and products, services, and materials.**

3.2.6.1 Keep SDCs informed via a current calendar of impending data releases.

3.2.6.1.1 MEASURE: Update the corporate calendar on SDC website on a weekly basis.

3.2.6.2 Understand the needs of the network/public.

3.2.6.2.1 MEASURE: Communicate with each SDC lead quarterly regarding the needs of their individual state network on a quarterly basis.

3.2.6.3 Provide the SDCs with new technology plans.

3.2.6.3.1 MEASURE: Communicate with the SDCs through virtual networks and in-person meetings information regarding the latest technology platforms.

3.2.6.4 Enable the SDCs to serve data users by providing embargo access to approved SDCs for data releases, training SDCs, and utilizing SDC experience and feedback to improve data quality and data tools.

3.2.6.4.1 MEASURE: Maintain the current list of SDC leads who are eligible for embargo access.

3.2.6.4.2 MEASURE: Notify the embargo eligible SDCs of embargo release date and time at least two days in advance of embargo.

**3.3 LOCAL EXPERT GOAL: To be recognized as the local expert in data analysis, technical assistance, and custom product development.**

**3.3.1 SDC LOCAL EXPERT OBJECTIVE: Gain and disseminate knowledge of Census Bureau tools to facilitate proper use of Census Bureau statistics.**

3.3.1.1 Stay abreast of the most recent Census Bureau developments.

3.3.1.1.1 MEASURE: SDC or representative participates in the National Annual Meeting, Census Bureau/CLMSO Training.

3.3.1.1.2 MEASURE: SDC or representative participates in at least one in-person or alternative format meeting (e.g. webinar, conference call, social collaboration platforms) a quarter.

3.3.1.1.3 MEASURE: Conduct a local annual meeting or provide access to educational/training opportunities to stakeholders annually and document in the SDC annual report.

**3.3.2 SDC LOCAL EXPERT OBJECTIVE: Provide technical advice to stakeholders in understanding and using Census Bureau data/products/systems/tools.**

3.3.2.1 Prepare value added products from the Census Bureau data.

3.3.2.1.1 MEASURE: Provide value added products for stakeholders from Census Bureau data and Information and document in the SDC annual report.

3.3.2.2 Maintain an active relationship with local stakeholders in providing expertise on Census tools and products.

3.3.2.2.1 MEASURE: Report total number of technical responses to stakeholders and document in the SDC annual report.

**3.3.3 CLMSO LOCAL EXPERT OBJECTIVE: Provide free and unlimited training, technical documentation, materials, tools, and support to the SDCs as the Census Bureau's "premiere local partner."**

3.3.3.1 MEASURE: Create web pages on both the secured server and main site that supports recorded videos, webinars, links to training tools, etc.

3.3.3.2 MEASURE: With the help of the training staff, create videos to aid in the instruction on use of data access tools.

3.3.3.3 MEASURE: Report total number of training sessions, technical documentation, materials, tools, and support provided to the SDC by quarter per fiscal year.

3.3.3.4 MEASURE: Provide electronically and post to the Internet Frequently Asked Questions (FAQs) and answers posed by the network.

**3.4 PROMOTION GOAL: Encourage use of Census Bureau products and programs.**

**3.4.1 SDC PROMOTION OBJECTIVE: Work to maximize stakeholder involvement and knowledge of local Census events (e.g. Census Bureau programs, campaigns, and promotions).**

3.4.1.1 Burnish Premier Local Partner brand

3.4.1.1.1 MEASURE: Census Premier Local Partner logo/by-line included – where appropriate – on SDC network websites and/or materials disseminated by the SDC networks.

3.4.1.2 Work with Census Bureau to help with the promotion, recruitment, and operational needs of Census Bureau and Surveys.

3.4.1.2.1 MEASURE: Participate in the promotion of Census Bureau censuses and surveys and operational support as necessary and appropriate.

3.4.1.2.2 MEASURE: Provide updates as needed on Census Bureau data and developments from local stakeholders per program requirements (LUCA, PUMA, BAS, etc.).

3.4.1.3 Emphasize upcoming events, the importance of participation, and uses of Census Bureau products.

3.4.1.3.1 MEASURE: SDC will encourage stakeholders to use products and participate in censuses and surveys conducted by the Census Bureau through publications and/or media as necessary and appropriate. Activities of this type will be documented in the SDC annual report.

3.4.1.3.2 MEASURE: Provide monthly, or more frequently as needed, updates of Census Bureau data and developments to local stakeholders.

**3.4.2 CLMSO PROMOTION OBJECTIVE: Promote SDC as the Census Bureau's premiere local partner within as well as outside the Bureau.**

3.4.2.1 Provide promotion materials in a timely manner.

3.4.2.1.1 MEASURE: Alerts sent out within one business day of materials made available on the website.

3.4.2.2 Coordinate with regional offices to provide promotional resources and materials.

3.4.2.2.1 MEASURE: Contact Regional Office (RO) Data Dissemination Initiative (DDI) staff on a monthly basis and publish a calendar of their events.

3.4.2.2.2 MEASURE: Invite RO DDI staff to Steering Committee meetings to provide updates on their activities.

3.4.2.3 Promote value added products of the SDCs.

3.4.2.3.1 MEASURE: Keep a record of how and where the SDC value-added products have been showcased, as well as by whom.

3.4.2.3.2 MEASURE: Create a subsite to showcase SDC value added products and provide links to individual SDC websites with products and presentations.

3.4.2.4 Ensure that the SDCs are knowledgeable of and participate in local Census events as a partner with the CENSUS BUREAU.

3.4.2.4.1 MEASURE: Communicate quarterly with ROs to obtain calendar of events.

3.4.2.4.2 MEASURE: Maintain a calendar of all Census Information Center (CIC), State Data Center (SDC), Regional Office (RO), and Federal State Cooperative for Population Estimates (FSCPE) events on the SDC website.

3.4.2.5 Provide opportunities and resources to the SDCs in a timely manner to support their application and promotion of Census data and maintain communication about local experiences with Census data and tools.

3.4.2.5.1 MEASURE: Communicate Census news and developments to the SDC Steering Committee within three business days and to the SDC network within five business days to facilitate participation.

3.4.2.6 Work with SDCs to build public trust and confidence in the Bureau and its products.

3.4.2.6.1 MEASURE: Communicate Census news and developments to the SDC Steering Committee within three business days and to the SDC network within five business days.

3.4.2.6.2 MEASURE: CLMSO provides an annual report of activities with the SDC network and Steering Committee at the annual meeting.

### **3.5 TRAINING AND EDUCATION GOAL: Provide instruction to ensure Census Bureau data are used innovatively, effectively and appropriately.**

#### **3.5.1 SDC TRAINING and EDUCATION OBJECTIVE: Educate and instruct local stakeholders on the availability and use of Census data and statistical information.**

3.5.1.1 Train/assist data users on how to acquire, use, and interpret data.

3.5.1.1.1 MEASURE: Report total number of training sessions and participants, and other assistance provided on the use of Census Bureau data and document in the SDC annual report.

3.5.1.1.2 MEASURE: Provide monthly, or more frequently as needed, updates of Census Bureau data and developments to local stakeholders.

3.5.1.2 Provide training and educational opportunities for network affiliates to further train and educate their constituents.

3.5.1.2.1 MEASURE: Report total number of training sessions and participants, and other assistance provided by affiliates on Census Bureau data and document in the SDC annual report.

3.5.1.2.2 MEASURE: Provide monthly, or more frequently as needed, updates of Census Bureau educational opportunities, tools, data and developments to affiliates.

3.5.1.3 Make presentations to teach Census Bureau data concepts to data users.

3.5.1.3.1 MEASURE: Provide a local annual meeting or provide/promote educational/training opportunities to stakeholders. Report total number of presentations and participants, and other assistance provided of this nature documented in the SDC annual report.

3.5.1.4 Share instructional products and best practices within the SDC network.

3.5.1.4.1 MEASURE: SDC will collaborate and share best practices within the SDC network using agreed upon processes, technologies, and reporting intervals.

3.5.1.4.2 MEASURE: Provide monthly, or more frequently as needed, updates of Census Bureau educational opportunities, tools, data and developments to affiliates.

3.5.1.4.3 MEASURE: Completion of SDC annual report showing developed products/processes by individual SDC networks and promote local SDC network products and best practices as needed.

**3.5.2 CLMSO TRAINING and EDUCATION OBJECTIVE: Ensure that the SDCs have timely and targeted training on CENSUS BUREAU products, programs and initiatives.**

3.5.2.1 Develop, obtain, and share training materials.

3.5.2.1.1 MEASURE: Communicate Census news and developments to the SDC Steering Committee within three business days and to the SDC network within five business days.

3.5.2.2 Coordinate/conduct training for the SDC network on how to acquire, use, and interpret data.

3.5.2.2.1 MEASURE: Provide monthly, or more frequently as needed, webinars on how to acquire, use, and interpret data.

3.5.2.3 Coordinate with regional offices to provide education resources and materials.

3.5.2.3.1 MEASURE: Communicate monthly with Census Bureau regional offices to obtain calendar of events.

3.5.2.4 Encourage development of instruction techniques within the SDC network.

3.5.2.4.1 MEASURE: Keep a tally of to whom and where the SDC value added product (instructional technique or product) has been showcased.

**.6 ASSISTANCE with CENSUS PROGRAMS GOAL: Enhance the quality of Census Bureau's surveys and products.**

**3.6.1 SDC ASSISTANCE with CENSUS PROGRAMS OBJECTIVE: Be an integral part of Census Bureau programs and objectives.**

3.6.1.1 Serve as the local Census advocate for survey participation and product and tool development.

3.6.1.1.1 MEASURE: SDC Steering Committee will lead/promote full SDC network participation and feedback for product and tool development when collaboration is warranted by the Census Bureau through the CLMSO and/or direct Bureau program administration. Activities will be documented in the SDC annual report.

3.6.1.1.2 MEASURE: SDCs will document the total number of times participated in surveys, product development, and tool design promotions in the SDC annual report.

3.6.1.1.3 MEASURE: Provide updates as needed (e.g., on Census Bureau data and developments) from local stakeholders.

3.6.1.2 Provide design input, testing, and feedback to the Census Bureau on products and programs.

3.6.1.2.1 MEASURE: SDC Steering Committee will lead/promote full SDC network participation and feedback for product and tool development when collaboration is warranted by the Census Bureau through the CLMSO and/or direct Bureau program administration. Activities will be documented in the SDC annual report.

3.6.1.2.2 MEASURE: SDCs will provide feedback, assist in planning, and participate in at least one alternative format (e.g. webinar, conference call, social collaboration platforms) meeting a month. Document total number of times participated in the SDC annual report.

3.6.1.2.3 MEASURE: Provide updates as needed on Census Bureau data and developments from local stakeholders.

3.6.1.3 Strengthen the relationship between the Census program staff, local governments and stakeholders/clients in implementing surveys and delivering products.

3.6.1.3.1 MEASURE: SDC Steering Committee will lead/promote full SDC network participation and feedback for product and tool development when collaboration is warranted by the Census Bureau through the CLMSO and/or direct Bureau program administration. Activities will be documented in the SDC annual report.

3.6.1.3.2 MEASURE: SDCs will document the total number of times they carried out activities supporting surveys and delivered products in the SDC annual report.

3.6.1.3.3 MEASURE: Provide monthly or more frequently as needed updates on Census Bureau data and developments to local stakeholders.

3.6.1.4 Assist the Census Bureau in survey implementation and maintenance.

3.6.1.4.1 MEASURE: SDC Steering Committee will lead/promote full SDC network participation and feedback for product and tool development when collaboration is warranted by the Census Bureau through the CLMSO and/or direct Bureau program administration. Activities will be documented in the SDC annual report.

3.6.1.4.2 MEASURE: SDCs will document the total number of times they carried out assistance activities supporting surveys and delivering products in the SDC annual report.

3.6.1.4.3 MEASURE: Provide feedback, assist in planning, and participate in at least one alternative format meeting a month.

### **3.6.2 CLMSO ASSISTANCE with CENSUS PROGRAM OBJECTIVE: Ensure that SDC Program has the opportunity to work hand-in-hand with Census Bureau programs.**

3.6.2.1 Provide SDCs with information needed for follow-up with local governments in a timely manner.

3.6.2.1.1 MEASURE: Communicate Census news and developments to the SDC Steering Committee within three business days and to the SDC network within five business days.

3.6.2.2 Support SDCs with adequate instruction and (especially) time to complete the tasks at hand.

3.6.2.2.1 MEASURE: Provide monthly, or as requested, webinars and other options to show instructional information

3.6.2.2.2 MEASURE: Provide monthly timelines for deliverable with concise instructions for each assigned task.

3.6.2.3 Provide good (timely, measurable, frequent) communication and participation opportunities for the SDC network and the Census Bureau programs and staff.

3.6.2.3.1 MEASURE: Communicate Census news and developments to the SDC Steering Committee within three business days and to the SDC network within five business days.

3.6.2.4 Provide opportunities to meet with Census Bureau program staff via face-to-face and alternative opportunities to meet in a timely manner.

3.6.2.4.1 MEASURE: Support Steering Committee meetings, annual meeting and other technical support meetings (e.g. webinars, conference calls, social collaboration platforms), including opportunities to meet with Census Bureau staff.

3.6.2.5 Promote the services of the SDCs within the Census Bureau.

3.6.2.5.1 MEASURE: Monitor various divisional internal meetings Suggesting SDCs assistance in census programs as appropriate.

3.6.2.6 Include SDCs in the discussion and planning of survey implementation and product delivery establishing clear timelines and requirements for SDC assistance.

3.6.2.6.1 MEASURE: Communicate Census news and developments to the SDC Steering Committee within three business days and to the SDC network within five business days.

3.6.2.6.2 MEASURE: Conduct regularly scheduled SDC Steering Committee meetings, annual meeting and other technical support meetings (webinars, conference calls, social collaboration platforms), including opportunities to meet with Census Bureau staff, budget permitting.

3.6.2.6.3 MEASURE: Monitor various divisional internal meetings and solicit SDCs input into programs.

### **3.7 BUILD A THRIVING NETWORK GOAL: Capitalize on the long-term partnership between the SDCs and the Census Bureau to accomplish common goals and objectives.**

#### **3.7.1 SDC PARTICIPATION in MEETINGS OBJECTIVE: Facilitate SDC representation and participation in the in-person annual meeting.**

3.7.1.1 A representative of each SDC must participate in annual meetings.

3.7.1.1.1 MEASURE: SDC lead or representative participates in the national annual meeting, Census Bureau/CLMSO training sessions or other in-person events.

3.7.1.2 Utilize and participate in meetings to strengthen communication among network members and Census Bureau staff.

3.7.1.2.1 MEASURE: SDC or representative participates in the national annual meeting, Census Bureau/CLMSO training sessions or other in-person events.

3.7.1.3 Assist in hands-on testing and share feedback and ideas about Census products and applications.

3.7.1.3.1 MEASURE: SDCs provide feedback, assist in planning, and participate in hands-on testing and discussions at the national annual meeting, Census Bureau/CLMSO training sessions or other in-person events.

3.7.1.4 Participate in strategic planning to define roles for mutual support in reaching SDC goals, and promote continuity and community.

3.7.1.4.1 MEASURE: Majority of SDC Steering Committee members participate in in-person format of strategic planning. Majority of voting SDC members support plan as determined by electronic polling.

### **3.7.2 SDC PARTICIPATION IN MEETINGS USING ALTERNATIVE/INTERACTIVE FORMATS**

**OBJECTIVE: Ensure high levels of participation in alternative meeting formats such as virtual meetings, conference calls, and webinars.**

3.7.2.1 Utilize and participate in alternative format meetings to strengthen communication among network members and Census Bureau staff.

3.7.2.1.1 MEASURE: SDC Steering Committee will participate fully in alternative meeting/interactive formats at least once a month.

3.7.2.1.2 MEASURE: Participation in alternative/interactive activities will be documented in the SDC annual report.

3.7.2.1.3 MEASURE: SDC Lead or representative participates in at least one alternative format meeting a quarter.

3.7.2.2 Assist in alternative format testing and share feedback and ideas about Census products and applications.

3.7.2.2.1 MEASURE: SDCs provide feedback, assist in planning, and participate in testing and discussions in alternative meeting formats whenever appropriate. Activities will be documented in the SDC annual report.

3.7.2.2.2 MEASURE: SDC or representative participates in at least one alternative format meeting a quarter.

3.7.2.3 Participate in alternative format strategic planning to define roles for mutual support in reaching our goals, and promote continuity and community.

3.7.2.3.1 MEASURE: SDC Steering Committee will participate fully in alternative format strategic planning as defined by agreed upon measures. Activities will be documented in the SDC annual report.

### **3.7.3 CLMSO PARTICIPATION IN MEETINGS OBJECTIVE: Promote continuity, community, and partnership between the SDC Network and the Census Bureau.**

3.7.3.1 Will host and provide funding for a representative from each SDC lead agency to attend annual face-to-face meeting.

3.7.3.1.1 MEASURE: Host one representative or designee from each SDC Lead Agency.

3.7.3.2 Provide funding for SDC Steering Committee members to attend the annual meeting and SDC Steering Committee meetings.

3.7.3.2.1 MEASURE: Support and host SDC Steering Committee meetings, annual meeting and other technical support meetings (webinars, conference calls, social collaboration platforms), including opportunities to meet with Census Bureau staff.

3.7.3.3 Coordinate and conduct a minimum of one face-to-face SDC network meeting and numerous alternative meetings per year.

3.7.3.3.1 MEASURE: Support and host SDC Steering Committee meetings, annual meeting and other technical support meetings (webinars, conference calls, IdeaScale), including opportunities to meet with Census Bureau staff.

3.7.3.4 Provide the means and environment in which Census and SDC stakeholders can meet in person to maintain and improve communication and partnership towards providing our communities with reliable and supported data.

3.7.3.4.1 MEASURE: Support and host SDC Steering Committee meetings, annual meeting and other technical support meetings (webinars, conference calls, Idea Scale), including opportunities to meet with Census Bureau staff.

3.7.3.5 Promote networking through social collaboration platforms (i.e., synchronous and asynchronous).

3.7.3.5.1 MEASURE: Provide calendar invitations summary for virtual meetings and confirm membership in collaboration platforms. Total number and attendance documented in the SDC annual report.

**3.7.4 CLMSO PARTICIPATION IN ALTERNATIVE MEETING FORMATS OBJECTIVE: Provide the means for all SDC network members to communicate, collaborate, be trained or learn about Census statistics and processes on an ongoing basis.**

3.7.4.1 Schedule and host alternative format meetings to reinforce the ongoing work taking place within the network for the Census Bureau.

3.7.4.1.1 MEASURE: CLMSO will regularly host webinars, virtual meetings, and collaboration platforms to keep the SDC network informed about the Census Bureau and its products.

3.7.4.1.2 MEASURE: CLMSO will provide access to virtual meetings for the entire network at least once a month, except for months when CLMSO is hosting the annual conference for the network.

3.7.4.2 CLMSO will host alternative meetings as a source for feedback about Census products and applications for the SDC network.

3.7.4.2.1 MEASURE: The Census Bureau will host virtual meetings and open up collaboration platforms at such times when it needs feedback, assistance in training, or for product testing, to provide a forum for discussion with the SDC network.

3.7.4.2.2 MEASURE: CLMSO will provide access to virtual meetings for the entire network at least once a month, except for months when CLMSO is hosting the annual conference for the network.

3.7.4.3 Provide virtual meetings as a forum for strategic planning. These meetings allow the SDC network and Census Bureau to more efficiently define the roles each play in the network, and strengthen the working relationship between CLMSO and the SDC network.

3.7.4.3.1 MEASURE: CLMSO will provide regularly scheduled and facilitated virtual meetings for strategic planning when necessary to define the roles and goals of the network and CLMSO.

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