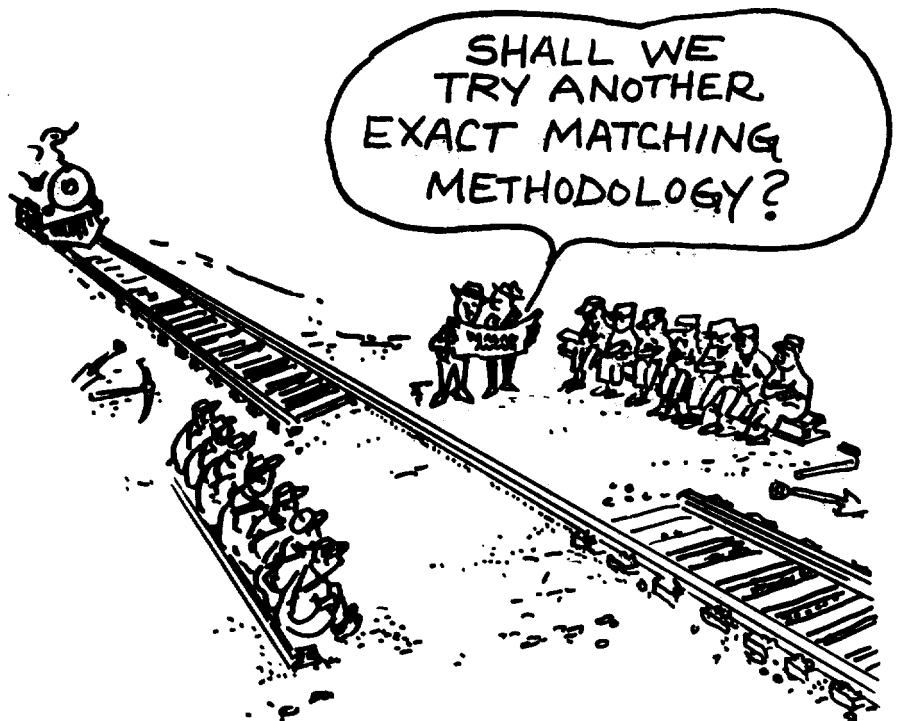


# Appendix B: Workshop Particulars —

Workshop Program  
List of Attendees  
List of Sponsors

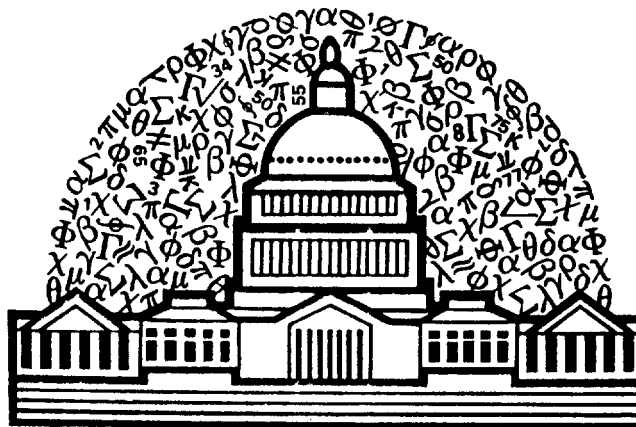


THE WASHINGTON STATISTICAL SOCIETY  
AND THE  
FEDERAL COMMITTEE ON STATISTICAL METHODOLOGY

# Workshop on Exact Matching Methodologies

MAY 9-10, 1985

ROSSLYN WESTPARK HOTEL  
1900 N. FORT MYER DRIVE  
ARLINGTON, VIRGINIA 22209



**AGENDA**

**WORKSHOP ON EXACT MATCHING METHODOLOGIES**

**May 9-10, 1985**

**Sponsored by  
The Washington Statistical Society  
and the  
Federal Committee on Statistical Methodology**

**THURSDAY, MAY 9, 1985**

**8:30 a.m. - 9:30 a.m.  
REGISTRATION/COFFEE**

**Promenade, 2nd Floor**

**9:30 a.m. - 11:30 a.m.  
OVERVIEW OF APPLICATIONS AND INTRODUCTION TO THEORY  
Chair: FRITZ SCHEUREN, Internal Revenue Service**

**Rosslyn A, 2nd Floor**

**( 9:45) "Tutorial on the Fellegi-Sunter Model for Record Linkage," IVAN  
FELLEGI, Statistics Canada**

**(10:15) "Why Are Epidemiologists Interested in Matching Algorithms?"  
GILBERT W. BEEBE, National Cancer Institute**

**(10:45) "Exact Matching: The Products of Record Linkage -- Productive,  
Misleading, and Otherwise," ROBERT F. BORUCH, Northwestern  
University, and ERNST STROMSDORFER, Washington State University**

**(11:15) Floor Discussion**

**11:30 a.m. - 1:00 p.m.  
LUNCHEON (Prepaid Event)**

**Westpark Cafe, 1st Floor**

WORKSHOP ON EXACT MATCHING METHODOLOGIES

THURSDAY, MAY 9, 1985 -- continued

1:00 p.m. - 3:00 p.m.

Rosslyn A, 2nd Floor

CURRENT THEORY AND PRACTICE

Chair: THOMAS B. JABINE, Consultant, Committee on National Statistics

- (1:10) "Multiple Linkage and Measures of Inexactness: Methodology Issues," WRAY SMITH, Mathematica Policy Research, and FRITZ SCHEUREN, Internal Revenue Service
- (1:25) "An Information Theoretic Approach to Weights in Computer Matching," NANCY KIRKENDALL, Energy Information Administration
- (1:40) "Advances in Record Linkage Methodology: A Method for Determining the Best Blocking Strategy," PATRICK KELLEY, Bureau of the Census
- (1:55) "Preprocessing of Lists and Substring Comparison," WILLIAM E. WINKLER, Energy Information Administration
- (2:10) Discussant: BENJAMIN TEPPING, Westat, Inc.
- (2:25) Discussant: ELI MARKS, Consultant
- (2:40) Floor Discussion

3:00 p.m. - 3:30 p.m.

Promenade, 2nd Floor

COFFEE BREAK

3:30 p.m. - 5:00 p.m.

Rosslyn A, 2nd Floor

APPLICATION CASE STUDIES I

Chair: MARIA ELENA GONZALEZ, Federal Committee on Statistical Methodology

- (3:35) "The National Death Index Experience: 1982-1985," JOHN E. PATTERSON and ROBERT BILGRAD, National Center for Health Statistics
- (3:50) "An Implementation of a Two-Population Fellegi-Sunter Probability Linkage Model," MAX G. ARELLANO, University of California, San Francisco
- (4:05) "Deriving Labor Turnover Rates from Administrative Records," MALCOLM S. COHEN, University of Michigan
- (4:20) Discussant: NORMAN JOHNSON, U.S. Bureau of the Census
- (4:35) Floor Discussion

5:00 p.m. - 7:00 p.m.

Dogwood, 2nd Floor

INFORMAL RECEPTION (With Cash Bar)

Members of the  
FEDERAL COMMITTEE ON STATISTICAL METHODOLOGY  
(May 1985)

Maria Elena Gonzalez (Chair)  
Office of Management and Budget

Barbara Bailar  
Bureau of the Census

Norman Beller  
National Center for Education Statistics

Yvonne Bishop  
Energy Information Administration

Edwin Coleman  
Bureau of Economic Analysis

John Cremeans  
Bureau of Industrial Economics

Zahava Doering  
Defense Manpower Data Center

Daniel Garnick  
Bureau of Economic Analysis

C. Terrence Ireland  
Department of Defense

Charles Jones  
Bureau of the Census

Daniel Kasprzyk  
Bureau of the Census

William Kibler  
Department of Agriculture

David Pierce  
Federal Reserve Bank

Thomas Plewes  
Bureau of Labor Statistics

Jane Ross  
Social Security Administration

Fritz Scheuren  
Internal Revenue Service

Monroe Sirken  
National Center for Health Statistics

Thomas Staples  
Social Security Administration

Robert Tortora  
Department of Agriculture

WORKSHOP ON EXACT MATCHING METHODOLOGIES

FRIDAY, MAY 10, 1985

- 8:30 a.m. - 9:00 a.m. Promenade, 2nd Floor  
COFFEE
- 9:00 a.m. - 10:30 a.m. Rosslyn A, 2nd Floor  
APPLICATION CASE STUDIES II  
Chair: DANIEL H. GARNICK, Bureau of Economic Analysis
- (9:05) "The 1979 Partnership and Sole Proprietorship Employment and Payroll Link Studies," NICK GREENIA, Internal Revenue Service
- (9:20) "Creating the Small Business Administration's Master Establishment List," DAVE HIRSCHBERG, Small Business Administration
- (9:35) "Enhancing Data from the Survey of Income and Program Participation with Economic Data," DOUGLAS K. SATER, Bureau of the Census
- (9:50) Discussant: JOSEPH STEINBERG, Survey Design, Inc.
- (10:05) Floor Discussion
- 10:30 a.m. - 10:45 a.m. Promenade, 2nd Floor  
COFFEE BREAK
- 10:45 a.m. - 12:15 p.m. Rosslyn A, 2nd Floor  
COMPUTER SOFTWARE AVAILABLE  
Chair: HERB MILLER, Social and Scientific Systems, Inc.
- (10:50) "Project LINK-LINK: An Interactive Database of Administrative Record Linkage Studies," JANE L. CRANE, National Center for Education Statistics, and DOUGLAS G. KLEWENO, Department of Agriculture
- (11:05) "Design and Implementation of a Generalized Record Linkage System," MATTHEW JARO, U.S. Bureau of the Census
- (11:20) "Recordkeeping and Data Preparation Practices to Facilitate Record Linkage," MARTHA E. SMITH, Statistics Canada
- (11:35) Discussant: TED HILL, Statistics Canada
- (11:50) Floor Discussion

WORKSHOP ON EXACT MATCHING METHODOLOGIES

FRIDAY, MAY 10, 1985 -- continued

12:15 p.m. - 1:30 p.m.  
LUNCH BREAK

1:30 p.m. - 4:30 p.m.  
COMPUTER SOFTWARE WORKSHOP (Three Continuous Concurrent Sessions)

(1:30) JANE L. CRANE, National Center Rosslyn A, 2nd Floor  
(2:30) for Education Statistics,  
(3:30) will demonstrate LINK-LINK.

(1:30) MATTHEW JARO, Bureau of the Census, Rosslyn A, 2nd Floor  
(2:30) will demonstrate the Census Bureau's  
(3:30) Matching System.

(1:30) TED HILL, Statistics Canada, will Shenandoah A, 2nd Floor  
(2:30) present a seminar on Statistics  
(3:30) Canada's Generalized Iterative  
Record Linkage System (GIRLS).

4:30 p.m.  
ADJOURN

LIST OF ATTENDEES  
WORKSHOP ON EXACT MATCHING METHODOLOGIES

MAY 9-10, 1985

James Alder  
Bureau of the Census

Lois Alexander  
Social Security Administration

Bernard Altschuler  
Bureau of Labor Statistics

Wendy L. Alvey  
Internal Revenue Service

Keith Amick  
Bureau of the Census

John C. Angle  
Internal Revenue Service

Jonathan G. Ankers  
Bureau of the Census

Sam Arcangeli  
State of Florida

Max Arellano  
University of California

Catherine Armington  
Applied Systems Institute

Barbara Bailar  
Bureau of the Census

Erma Barron  
Social Security Administration

Gilbert Beebe  
National Cancer Institute

Richard Bell  
Social Security Administration

William Bennett  
Bureau of Labor Statistics

Mary Bentz  
Internal Revenue Service

Paul P. Biemer  
Bureau of the Census

Robert Bilgrad  
National Center for Health Statistics

Robert F. Boruch  
Northwestern University

Chet Bowie  
Bureau of the Census

James E. Bozik  
Bureau of the Census

Bertie Brame  
Internal Revenue Service

Ralph Bristol  
Department of the Treasury

Warren L. Buckler  
Social Security Administration

Paul Burke  
Department of Housing and Urban Development

William P. Butz  
Bureau of the Census

Charles Byce  
The Brookings Institution

Helen Choi  
Internal Revenue Service

Malcolm S. Cohen  
University of Michigan

Sherry Courtland  
Bureau of the Census

Charles Cowan  
Bureau of the Census

Lawrence H. Cox  
Bureau of the Census

Pat Crabbe  
Internal Revenue Service

Jane Crane  
National Center for Education Statistics

Lester Curtin  
National Center for Health Statistics

John Czajka  
Mathematica Policy Research, Inc.

Robert Dalrymple  
Office of Analysis and Evaluation

Ramesh Dandekar  
Energy Information Administration

Charles Day  
Internal Revenue Service

Linda DeBene  
Social Security Administration

Charles Eastlack  
Westat, Inc.

Alan Eck  
Bureau of Labor Statistics

Marlene Einstein  
Bureau of Labor Statistics

Frank Elsen  
Energy Information Administration



Ivan P. Fellegi  
Statistics Canada

Wayne Finegar  
Social Security Administration

Barbara Garner  
Bureau of the Census

Daniel H. Garnick  
Bureau of Economic Analysis

Tommy W. Gauden  
Bureau of the Census

William Gerber  
Internal Revenue Service

Claudia Glover  
Bureau of the Census

Maria E. Gonzalez  
Office of Management and Budget

Mildred Gray  
University of the District of Columbia

Wayne B. Gray  
National Bureau of Economic Research

Brian Greenberg  
Bureau of the Census

Nick Greenia  
Internal Revenue Service

Richard Gress  
University of Utah

Lisa Gross  
Internal Revenue Service

Jim Harte  
Internal Revenue Service

Beth Hill  
Bureau of the Census

Ted Hill  
Statistics Canada

David Hirschberg  
Small Business Administration

K. P. Ho  
Atomic Energy Control Board

Paul Holland  
Educational Testing Service

Geoffrey Howe  
University of Toronto

Terry Ireland  
Department of Defense

Richard Irwin  
Bureau of the Census

Thomas Jabine, Consultant  
Committee on National Statistics

Kathleen Jablonski  
Capital Systems Group

Matthew Jaro  
Bureau of the Census

Robert Jewett  
Bureau of the Census

Norman Johnson  
Bureau of the Census

David Judkins  
Bureau of the Census

Kenneth Kaplan  
Bureau of the Census

Myron Katzoff  
Bureau of the Census

Patrick Kelley  
Bureau of the Census

Berdj Kenadjian  
Internal Revenue Service

Bertram M. Kestenbaum  
Social Security Administration

Beth Kilss  
Internal Revenue Service

Nancy Kirkendall  
Energy Information Administration

Douglas Kleweno  
Department of Agriculture

Lynn Kuo  
Department of Agriculture

Enrique Lamas  
Bureau of the Census

William LaPlant  
Bureau of the Census

Terry Lotz  
University of Utah

Dr. Joseph L. Lyon  
University of Utah

Eli S. Marks  
Consultant

Reggie D. Masano  
Bureau of the Census

Carlyle Haw  
National Center for Education Statistics

Jim McBride  
Response Analysis Corporation

Philip McClain  
Centers for Disease Control

Nelson McClung  
Department of Treasury

Robert J. McIntire Bureau of Labor Statistics	Douglas K. Sater Bureau of the Census
Michael L. Mersch Bureau of the Census	Fritz Scheuren Internal Revenue Service
M. P. Mi University of Hawaii	Mary Ellen Schiller Social Security Administration
Herbert J. Miller Social & Scientific Systems, Inc.	Jack Schmulowitz Social Security Administration
Deborah Moore Bureau of the Census	Marvin L. Schwartz Internal Revenue Service
Jeffrey Moore Bureau of the Census	Sidney Schwartz Bureau of the Census
Ann J. Nakamura Revenue Canada Taxation	Daniel F. Skelly Internal Revenue Service
Dwaine Nelson Department of Agriculture	Martha Smith Statistics Canada
Elizabeth Nelson Internal Revenue Service	Wray Smith Mathematica Policy Research
Karen V. O'Connor Bureau of Labor Statistics	Joseph Steinberg Survey Design, Inc.
H. Lock Oh Internal Revenue Service	B. J. Stone National Cancer Institute
Bill Page National Academy of Sciences	Tim H. Tang Pacific Gas & Electric Company
David P. Paris Internal Revenue Service	Benjamin Tepping Westat, Inc.
John Patterson National Center for Health Statistics	Kathryn Thomas Bureau of the Census
John D. Pearson Energy Information Administration	John Thompson Bureau of the Census
Thomas Petska Internal Revenue Service	Wendel L. Thompson Energy Information Administration
Henry Power Department of Agriculture	James Tonascia Johns Hopkins School of Hygiene & Public Health
D. Dean Prochaska Bureau of the Census	Barbara Tyler Social Security Administration
Judith N. Rayner Westat, Inc.	Carol M. Utter Bureau of Labor Statistics
Eugene Rogot National Heart, Lung, and Blood Institute	Richard Wehrly Social Security Administration
Steve Ropel Department of Agriculture	Oliver Wilson Internal Revenue Service
Jeffrey Roth National Research Council	Robert Wilson Internal Revenue Service
Peter Sailer Internal Revenue Service	Barry R. Windheim Internal Revenue Service
Jean Salter Bureau of Economic Analysis	William E. Winkler Energy Information Administration

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