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Volume Title: Annals of Economic and Social Measurement, Volume 2, number 2

Volume Author/Editor: NBER

Volume Publisher: NBER

Volume URL: <http://www.nber.org/books/aesm73-2>

Publication Date: April 1973

Chapter Title: A Guide to the 1960-1971 Current Population Survey Files

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Chapter URL: <http://www.nber.org/chapters/c9890>

Chapter pages in book: (p. 189 - 199)

## DATA BANKS AND FILES

### A GUIDE TO THE 1960-1971 CURRENT POPULATION SURVEY FILES

BY JODIE T. ALLEN

Other papers in this issue refer to the potential usefulness of the CPS Income/Work Experience Files in longitudinal and cross-sectional analysis. A series of these files, covering the period from the March 1960 survey through the most recently released tape of March 1971, is in the possession of the Urban Institute and thus potentially available for use by interested researchers. This paper is simply an attempt to describe the content and state of these files and to document some of the difficulties involved in their use. It is hoped that the net effect of these disclosures is not to discourage completely any further use of the files but rather to warn the potential user that a great deal of thought and care is required in their use, and that such enterprises may be expensive both financially and psychically.

Three series of files are available. The series may be distinguished by coverage, format, and content although variations in all of these dimensions also exist within each series. All of the files contain data on household demographic characteristics and survey week work experience enumerated in March of each year covered. In addition, information on prior year income and, since 1970, prior year work experience obtained from the special March income supplement are included. In the years before 1970, prior year work experience information was incorporated into the file by merging data gathered in February for three-quarters of the March sample and; since 1966, data for April were added for the remaining quarter of the sample. The quality and quantity of the income and work experience data have improved over time, although in no years are data on wage rates available and only coded data are provided on weeks worked and usual hours of work. Some useful income information asked for in the surveys, such as self-employment gross receipts and expenses, is suppressed in preparing the tape files.

An excellent description of the sample frame, survey procedures, types and sources of data, and commonly used terminology appears in the introductory section of the Consumer Income series (Series P-60) of the *Current Population Reports* produced each year by the Bureau of the Census from the March survey.

In assessing the potential usefulness of the CPS series, the researcher should be aware of the existence of three other data sources which provide information of similar content and, in some respects, superior quality to the CPS, though for neither the time span nor sample breadth provided by the CPS series. The Survey of Economic Opportunity, sponsored by the Office of Economic Opportunity, provides a sample of 35,000 households questioned in March of 1966 and March of 1967. An oversampling of urban poverty areas was undertaken so that data on some 12,000 families in such areas are available (the sample of non urban poor families is thus considerably smaller than that provided by the CPS). The SEO

questionnaire amplified the basic CPS document with additional questions on health status, poverty status, assets, income, child spacing, wages (as well as hours) for the survey week and other information useful in poverty analysis. The tapes have been extensively documented and edited under the direction of the Brookings Institution. The second series is the Michigan Longitudinal Survey or "Panel of Income Dynamics," a five-year (1968-1972) follow-up of a subset of the SEO population undertaken by the Survey Research Center of the University of Michigan. The last series is the National Longitudinal Survey conducted by the Census Bureau for the Department of Labor—a five-year longitudinal study of labor force experience among four special labor force groups—young men, young women, older men and "mature" women. The study is phased over the period 1965-1973 and is under the technical direction of the Center for Human Resource Research at Ohio State.

#### 1. THE FAMILY FILES—MARCH 1960 THROUGH MARCH 1967

The oldest series of tapes beginning with the March 1960 survey and extending through the March 1967 survey consists of summary records on locational and demographic characteristics, income, poverty status, and work history for primary families, sub-families, secondary families and unrelated individuals. The family summary includes considerable data on education, age, sex, marital status and work experience of family heads and, where present, wives but only summary information on other family members. Total family income is given by four sources (Wage/Salary, Nonfarm Self-Employment, Farm Self-Employment and other) as well as Total Income (but not earnings) of Head and Wife.

I obtained the tapes from the Census Bureau while an employee in the Office of the Secretary, HEW in 1968. The tapes, as retained by Census, were prepared in a mixed format of packed binary and "XS-3" code on an Univac 1105, a now near extinct species of computer. Thus, considerable conversion effort using special Census software and hardware was required to make the tapes readable on more accessible hardware. Only one copy of the tapes exists—a matter of some potential difficulty since the only copy of the conversion program was destroyed by Census as part of their regular tape purging process; in addition, at least one of the tapes, the 1963 survey, has developed parity errors leading to the loss of several records.<sup>1</sup>

Other than the editing performed by the Census, no "cleaning" of the tapes has been performed. In using the series in various studies of income and work experience among the poor and near poor the various fields used were checked for permissible ranges and for logical consistency among them but no alterations were made to the tapes and no record maintained of any errors detected.<sup>2</sup>

The tapes were never intended by the Census Bureau to become Public Use files and, as a result, they are not well documented. The only available file format is a copy of a format prepared by the Census Bureau for the March 1966 family file

<sup>1</sup> A set of year to year matched files also exists but only about 30 percent and for 1963, only 6 percent of the sample is included. See Terence Kelly "The Creation of Longitudinal Data from Cross-section Surveys: An Illustration from the Current Population Survey," this issue.

<sup>2</sup> Similar checks were performed by the Hendrickson Corp. in creating the matched family files described in Terence Kelly's paper; on the extract tapes some corrections were made.

giving the 1105 tape layout. The author added to the format handwritten notations indicating the alterations made in the BCD conversion, as well as some explanatory information on the meaning and use of various fields and changes in definitions and/or availability of data in the various survey years. A typed document prepared by the Census Bureau is also available indicating changes in the coding and availability of various fields over the 1959 to 1967 period. Unfortunately the item numbers and field positions referred to in the Census document bear no relationship to the item numbers and field positions of the data as they appear in the tape format. The variables referred to can, however, be identified by the field descriptions. In addition, there exist a variety of notes recording information on the file obtained in conversations with Mrs. Eve Auerbach of the Demographic Survey Division who, over several years, gave freely and generously of her fund of knowledge about the tapes. Unfortunately Mrs. Auerbach, keeper of the oral tradition on how to use these tapes, has recently retired from the Census Bureau.

The ordering of the fields in the file format was dictated primarily by the objective of squeezing fields of varying magnitude as efficiently as possible into a 35 bit word, packed binary format. As a result there is little substantive logic to the ordering and it is particularly difficult to distinguish work experience items pertaining to the last year from those pertaining to the survey week.

Unfortunately, it would be very difficult if not impossible to use the tape without benefit of this knowledge. Equally unfortunate is the large and unglamorous effort which would be required to gather and systematize it. I have, however, attempted to record the most important items of information necessary for the user. Since most of these observations pertain to both the 1960-1967 family series and the 1964-1967 person-family series described below, the discussion appears at the end of the following section.

## 2. THE PERSON-FAMILY FILES MARCH 1964 THROUGH MARCH 1967

These tapes were also obtained from the Census Bureau in 1968 at the request of the President's Commission on Income Maintenance programs. Data from the tapes were used in a study of the labor supply effects of income maintenance programs.<sup>3</sup> The tapes contain the same family summary records as occur in the Family series described earlier but, in addition, following each summary record there appears a person detail record for each of the one or more members of the family unit. Unrelated individuals thus have their characteristics recorded twice, once on their family record and again on their person record. The person records repeat the geographical detail of the family record and give detailed demography for each household member. For all persons in the civilian population age 14 and over, detailed work experience and income by four component sources is given. The Person-Family files, also contain individual state codes for 23 states with the remaining 27 states grouped into clusters of considerably smaller size than the regional breaks given on the family files. Note that the combined family/person format was not produced by Census prior to the March 1964 survey. Although

<sup>3</sup> See Edward D. Kalachek and Fredric Q. Raines, "The Labor Supply of Low Income Workers" in *President's Commission on Income Maintenance Programs*. Technical Studies. Government Printing Office, 1970.

earlier person files exist, informed sources at the Census Bureau advise that attempts to either aggregate the person records into family structures or match them with the separate family files would be extremely difficult if not impossible.

The tapes were produced through the same conversion process described for the family series. The programming was done by the Hendrickson Corp. using Census hardware and software. In converting the files to BCD the fields were also rearranged into a somewhat more logical format. Typed documentation of the rearranged format is available from the Urban Institute or the Hendrickson Corp. Some additional explanatory notes have been added to the documentation but, as in the case of the family files, the information supplied is not necessarily sufficient to the needs of potential users.

The tapes were also subjected to a validation process which involved checking for out-of-range codes and cross verification of some fields. Few errors were found except that "junk" was detected in certain income component fields in the 1964 and 1965 surveys. It was determined from the Census Bureau that this condition arose from the editing procedures employed in these years in the case where total income was reported but no response was given for one or more component sources. In the course of the checking procedure these fields were assigned zero values with the result that, in a few cases, the sum of income components may not equal total family income as given on the file. Computer printouts are available documenting the number and type of corrections made to the files but this information has not been collected and summarized. Poverty codes were also added to the 1964 and 1965 tapes since these data were not included on the Census tapes for these two years. (The codes were not added to the family tapes for these two years however except on the matched files.)

Since the tapes were subjected to several processing steps involving merging of different family types, ordering by PSU (Primary Sampling Unit) and serial number,<sup>4</sup> and tape editing, several backup copies exist. During this process the tapes were converted to an unpacked binary format to reduce the high cost (about \$500) of reading the tapes in BCD with the standard IBM 360 FORTRAN decode routines. The complete, edited series are available only in this format. Appendix A provides general tape and file format specifications for the series.

The 1966 file differs slightly from the other years as the result of the addition of further detail on components of unearned income. These data were collected in a special supplement administered in March of 1965 and 1966 and supplied by Census to HEW on separate tapes. The 1966 Unearned Income Person record tapes were then matched by the Hendrickson Corp. with the complete person-family files for that year and the additional fields appended to the person records in the latter file. (The sums of the components could readily be computed and appended to the family summary records but this process was not carried out.) Five unearned income components are given (1) Social Security and Railroad Retirement; (2) Dividends, Interest and Rental Income; (3) Public Assistance; (4) Unemployment Compensation, Government Pensions and Veteran's payments, and (5) Private Pensions, Annuities, Alimony and all other unearned income. These groupings are the same

<sup>4</sup> These fields uniquely identify each family on the tape and are used in matching the files from month to month or year to year. To preserve confidentiality of respondents the fields were scrambled by the Census at the time the tapes were prepared for HEW.

as appear on the newer series of files beginning in March 1968. Since the sources were grouped somewhat differently in the 1965 supplement the match was not undertaken for that year although the files and procedures to do so are available.

### 3. CAUTIONARY NOTES ON THE 1960-1967 FAMILY AND PERSON-FAMILY FILE SERIES

As noted earlier there are several features and peculiarities of the files in these two series of which the user should be aware:

#### 3.1. *The Income Sample*

Prior year income and work experience data are not given for all records in all years. Such information is not collected for the following types of records:

(a) *Not in income sample.* Prior to the year 1966 the income questions were asked only of the  $\frac{3}{4}$  of the March sample which had also been included in the February sample (each month 2 of the 8 rotation groups included in the previous month's sample are dropped and another 2 added). The income questions were restricted to the recurring group since for the March-only group the work experience of the prior year (collected in February) could not be matched with the income of that year (collected in March). Thus on the Family Files for the survey years 1960-1963, approximately  $\frac{1}{4}$  of the household units are designated "NIIS" (Not in Income Sample) and neither last year's work experience nor last year's income are recorded. If it is desired to produce income or work experience estimates weighted to population aggregates for these years some procedure must be employed to weight the  $\frac{3}{4}$  sample to the total (in general the procedure employed by Census and others is a simple across the board inflation of the family weights on the assumption that the income and work experience of the missing  $\frac{1}{4}$  sample is distributed in the same proportions as that of the other  $\frac{3}{4}$ ). On the 1964 and 1965 family tapes, and also on the person-family files for those years, the "NIIS" group has already been eliminated by Census and the remaining sample weighted up to population totals. The average family and person weight on the 1964 and 1965 files is thus somewhat higher than on the tapes for the earlier and later years.

In addition to the "NIIS" group there appear in both series of files for *all years* prior to March 1966 certain families designated "February-March mismatch." These families are families supposedly represented in both the February and March surveys but for whom no February record could be found in the income/work experience match process (as the result of moves, substantial changes in family composition or simple miscoding). Prior to 1966 these families will have income but no work experience data recorded and again some adjustment procedure is necessary if it is desired to weight work experience data to national totals.

In March 1966 the "NIIS" group was eliminated by administering the work experience questions in April to the two rotation groups not included in the February sample. In the same year the "February-March mismatches" were also eliminated by assigning such respondents work experience values from other respondents with matched characteristics. In the case where no matched respondent could be found estimated values were assigned. Starting in March 1970 the whole

problem was eliminated by administering both income and work experience questions in March.

(b) *Armed Forces, institutionalized population and secondary individuals under age 14.* Income but not work experience data are given on all files for members of the Armed Forces living off post or with their families on post. Neither income nor work experience is given for members of the Armed Forces living in barracks on post or for inmates of penal institutions, mental institutions or homes for the aged or infirm (although, of course, the families of such persons, if they exist, are represented in the civilian population sample and, in the case of wives of service members may be identified by the marital status code of the residual family head—"Married, Spouse Absent, Armed Forces").

Records also exist in the file for secondary individuals under age 14 (typically foster children). These persons are not considered primary or sub-family members since they are related by neither blood nor adoption. Accordingly they appear in the file with a separate family as well as person record although neither income nor work experience is collected for such persons.

In the later files the records for the institutionalized and military population have been eliminated from the file so that the universe represented is only the civilian, noninstitutionalized population. In all files, however, the under-aged secondary individuals will appear so that it is necessary to screen on the population status code for the description "Civilian 14+" if income and work experience data are being tabulated.

### 3.2. *Population Weights*

The CPS is a self-weighting sample; that is, each family and person record in the file is assigned a numerical weight indicating the number of families or persons in the total population which are represented by the record in question. Summing the weights for different categories of families or persons gives the national aggregates for the groups in question (subject to the restrictions noted above with regard to the income/work experience sample). Several observations about the weights should be noted:

(a) *Supplemental and survey week weights.* The weights given in the 1960-1967 tape series are the so-called "supplemental weights," i.e. the weights assigned to families and individuals such that the weights will aggregate to Census projections of population components in the year preceding, i.e. the year to which the yearly income and work experience data pertain. A second weight, the monthly survey weight, is also calculated for each family and individual in order to produce the regular monthly tabulations of labor force participation and unemployment for the BLS. This second weight does not appear in the 1960-1967 files although it is given, in addition to the supplemental weight, on the 1968-1971 series described below.

(b) *Family and person weights.* In the person-family files the weight of each household member will not necessarily correspond to the weight of the family head. The weight of the family head should always be used in analyses relating to family aggregations (i.e. if it is desired to tabulate the number of children aged 6-8 living in families of certain types, the children in each family should be counted and the

number then multiplied by the weight of the head of the family of which they are members).

The weights of persons within a family may differ as the result of the procedures used by Census to assure that the straight person counts produced by tabulating the file tally with control numbers projected from the preceding decennial census on the age-sex-race distribution of the population. The person weights should thus be used in analyses in which individuals are considered without regard to their status as members of particular types of family groupings. (The appropriate weight to use is obviously not always a clear cut decision.)

(c) *Negative weights.* The process used by Census for adjusting person weights to control aggregates resulted in the assignment of negative weights to certain unrelated individuals in the files of the early years in the series. The procedure most commonly used in dealing with these records is simply to delete them.

(d) *Average size of weight.* The average weight assigned to each family in the sample is of course, a function of the number of households included in the sample. Prior to March 1967 approximately 35,000 households were enumerated in the surveys. In March 1963 the sample design was modified on the basis of the findings of the 1960 census to provide better coverage to fast growing areas. However while the number of primary sampling units was increased from 330 to 357 the total number of households sampled was not increased. The introduction of new PSU's in the March 1963 sample did, however, reduce the proportion of the March 1962 sample recurring in that of March 1963 so that the year to year match for that year is very small.

The average family weight on the available tapes for the 1960-1966 period does however vary depending on whether or not the "Not in Income Sample" observations are included on the tapes. As noted earlier these observations have been deleted from the 1964 and 1965 Family files and from all the Person-Family files from 1964 to 1967 and the weights of remaining  $\frac{3}{4}$  samples inflated to population totals.

In 1967 the regular CPS sample (designated the "A" sample on the files) was increased by 50 percent to bring the total number of households enumerated to approximately 52,500 units drawn from 449 areas. The average household weight thus declined proportionally. A temporary problem was introduced by the assignment of PSU and serial numbers to households in the added sample areas which in some instances duplicate those in the basic sample. Obviously this complicates considerably the problem of matching the 1966, 1967 and 1968 files (the problem was eliminated in the 1969 survey).

### 3.3. *Field Screening*

There are numerous cases where data fields do not apply to the full universe covered by the sample. In general, field descriptors do not include "top codes," indicating that the data were not collected for the person or family in question. Since undefined fields in a given record will thus contain legitimate looking values, it is necessary before tabulating a specific field to "screen" on other pertinent variables which determine whether the observation falls within the sub-universe for which the item in question was enumerated. For example: (a) Work Experience



fields are only defined for the "Employed or Experienced Unemployed," i.e. those either currently or recently employed. (b) Data pertaining to wives are obviously only defined for households in which the marital status of the head (chauvinistically defined in all cases as the male, if such is present) is "Married, Spouse Present." (c) "February-March Mismatches," "Not in Income Sample," plus all observations not designated "civilian 14+" must be screened out of income and work experience tabulations.

### 3.4. *Deciphering the Fields*

As noted earlier the presence or definition of certain data fields may vary from year to year in the early series. The meaning of the data recorded in various fields is also not always obvious from the format descriptions. In many cases—such as determining how farm or other self-employment losses are counted in income, whether in-kind or unusual income of various types are included in total family income, what is a "non-take-all segment," or how does one enumerate a hippie commune—resort is best had to the instruction manual for CPS interviewers (available from the Census Bureau). In other cases a look at the format specifications for the new CPS series, described below, will suffice, since all of the questions asked in the earlier years are repeated or expanded in the new schedule.

## 4. THE PERSON-FAMILY FILES—MARCH 1968 TO DATE

Beginning with the March 1968 survey through the most recent available survey (March 1971), a considerably improved series of tapes is available. The tapes are superior in the following ways:

1. Considerably expanded data are available on income, work history, and unemployment. (The expanded question set was actually administered in March of 1967 but the data processing procedures were not sufficiently complete to permit processing of that survey into the new format).

2. The documentation of the tape available from Census is far more extensive than in the early years. This documentation has been further amplified by Lou Koenig of the Urban Institute Staff and is available from the Institute upon request.

3. An extensive Income Improvement Program was launched by Census in 1968 to reduce non-response and improve response accuracy. Improved income editing and allocation procedures were also introduced into the Census processing of the tapes. For a description of the Income Improvement Program and the new editing procedures see the foreword to any of the various Census publications in the *Current Population Report: Consumer Income Series (Series P-60)*.

4. The tapes have also been exhaustively range-checked at the Urban Institute and discrepancies noted have been recorded. Again, documentation is available upon request.

5. An extensive research effort is underway at the Urban Institute to correct the files for the substantial amount of underreporting of property and transfer income in the CPS income surveys.<sup>5</sup>

<sup>5</sup> This effort is described in detail by Nelson McClung in his paper "Editing Census Survey Tape Files for Income and Wealth" in this issue.

The only important caveat in using these files, other than those noted earlier is that given the presence of duplicate identification fields (PSU and serial numbers) in the old and added samples in the 1968 file it would be most unwise to re-sort the tape on those fields (the duplicate numbered households are separated from each other in the file as it is currently arranged).

A rough chronology of important events in the life of the March CPS during the 1960's is included in Appendix B of this paper for ready reference as to changes in sample design, and data collection and editing procedures.

## 5. HOW TO OBTAIN THE TAPES

Readers who remain undaunted by the preceding cataloging of obstacles may obtain copies of the tapes from the Urban Institute by the following procedure:

1. Permission must be obtained from Mr. Daniel Levine, Chief, Demographic Survey Division, Bureau of the Census. To obtain such permission the potential user should describe the purpose for which the tapes are required and give assurances that the tapes once obtained will be used only for the purpose stated. The requirement for such assurances arises from the Census Bureau's understandable apprehension that the tapes will be used by researchers unfamiliar with the necessary precautions for obtaining sensible results from the data.

2. Full cost of copying the tapes (including supplying of blank tapes) must be borne by the requestor. Since the tapes are long (over 250,000 records for the later year tapes) copying charges are about \$200 a set. Furthermore Census restrictions require that in producing copies for users outside the Urban Institute (or in analyses done by the Institute other than for government agencies) income fields, by component, with values greater than \$50,000 be suppressed. Since various procedures could be employed depending upon the purpose of the user, special routines must be programmed for this purpose. Once the procedures are programmed, of course, more than one year of data could be processed at a lower marginal cost of reproduction for the additional years.

Since the cost of obtaining the files directly from the Census is very high (over \$2,000 for a single year file) and since the early year files are virtually unobtainable from that source, the Urban Institute will, understandably, not allow potential users to take physical possession of the Institute's tapes for copying at outside facilities.

## 6. CONCLUSIONS

The obvious conclusion from the foregoing is that if sufficient serious interest exists in gaining access to the 12 year series of CPS tapes currently available, concerted effort must be made to clean and document the files and to cast them into a compatible, easily used format. The format chosen should be "forward" compatible in the sense that the most comprehensive (most recent) file should define the basic format and the earlier year files should be converted into that format with appropriate identification of those fields which are undefined or defined with less detail in

the older files.<sup>6</sup> It would also be desirable to delete some of the redundant data (unedited fields and recoded values) which contribute greatly to the unwieldy length of the records in the newer files.<sup>7</sup>

The cost of such a conversion and documentation effort is probably at least \$50,000. A proposal to perform this task was submitted to the National Science Foundation by the Hendrickson Corporation, a firm with extensive experience in processing the files. The proposal was rejected by NSF on the grounds that the utility of the effort for policy-relevant research had not been demonstrated in the proposal. Given the past history of extensive use of the data by government policy makers in evaluating tax and transfer policy, it would seem that this defect in the proposal could easily be rectified. However expressions of interest in using the files would be most helpful to the Institute in deciding whether further efforts should be made in this direction.

In the meantime, the Social Security Administration and the Office of Economic Opportunity have recently let a joint contract to the Hendrickson Corporation to perform a matching of the person-family files for the 1964-1971 period. It is expected that in the course of this conversion additional editing and documentation of the complete files as well as the matched subsets will be produced and that the resulting files will be available to interested researchers.

*Urban Institute*

## APPENDIX A

### CPS TAPE SPECIFICATIONS

#### A. 1964-1967 February-March Match Current Population Survey Person-Family Tapes

1. Tape Format:
  - a. 800 BPI-9 Track (2 reels per year)
  - b. Binary Format (Each field shown on the tape format occupies one 32-bit word so that the field numbers on the format rather than the character numbers define the position of the data)
  - c. No Title Block
  - d. Blocking:  
VB, BLKSIZE = 10404, LRECL = 520 (except 1966)  
VB, BLKSIZE = 11204, LRECL = 560 (1966 only)
  - e. Record Count  
Survey Year  
1964-102,150 (including padding of last block)  
1965-102,000 (including padding of last block)  
1966-136,148  
1967-195,045
2. Order of Records and Other Information:  
The tapes are sorted by PSU and Schedule No. (both of these fields are scrambled)  
For each household the order is as follows (where more than one family is in the household)
  1. Primary Family Data
  2. Subfamily Data

<sup>6</sup> The set of matched family tapes covering the 1960-1970 period were converted to common format but the procedure employed reduced the format of the later year files to that of the earliest years. Person detail was not retained for any year.

<sup>7</sup> The Urban Institute has produced reformatted files of reduced length for the 1969 and 1970 CPS as part of the TRIM modelling effort described in this issue by John Moeller. One of the formats produced, the so-called CPSEO tape, is a format design for users interested in employing either the CPS or the 1967 Survey of Economic Opportunity in a common format.

3. Secondary Family Data

4. Unrelated Individuals

Within each Family Set the following records occur:

Family Record (This is given for unrelated individuals as well as families)

Person Record (1 for each person in the family)

Note that the income of subfamilies is included in the income of primary families as well as being recorded in their own data set. In tabulating income from family records you should either ignore the subfamily "family" record or, subtract that income from the total family income given in the primary family record if you wish to tabulate subfamilies separately.

In general, there are no "top" codes in undefined fields so that it is always necessary to cross-screen on fields not given for every record, e.g., always check for "Married, Spouse Present" in Marital Status before using any fields describing the wife.

B. 1969 February-March Current Population Survey

1. Tape Format:

a. 800 BPI-9 Track

b. EBDIC Format

c. No Title Block

d. Blocking: FB, BLKSIZE 9600, LRECL = 480

e. Record Count

Approximately 200,000 records (49,000 family records, 151,000 person records)

2. Order of Records and Other Information

These are given in the Census prepared format and description.

## APPENDIX B

### MARCH CPS CHRONOLOGY: 1960-1970

- March 1960-1965: Income data collected only for the  $\frac{1}{3}$  sample for which work experience data was collected in February.
- March 1962: 1st procedure employed for assigning income to non-respondents on basis of match with respondents of similar demographic characteristics. (Prior to that time non-respondents on one or more income sources were excluded from the income tabulations unless the sum of reported sources exceeded \$10,000 in which case the unreported sources were set to zero.)
- March 1963: Sample design modified on basis of 1960 Census to improve representation of rapidly grouping areas. Number of sampling areas increased from 330 to 357 but number of households sampled remained at approximately 35,000.
- March 1966: Income data collected for entire March sample. Work experience data on  $\frac{1}{4}$  of sample not in February survey was collected in April and merged into the February/March matched file to produce a complete income/work history set for the full sample; month to month "mismatches" eliminated by assigning work experience of matched respondents to mismatched records.
- March 1967: Sample expanded to 52,500 households (449 sampling areas).
- March 1968: Income Improvement Program initiated; expanded income and work experience questionnaire; improved data format and documentation; improved income edit and allocation features.
- March 1970: Income and Work Experience data collected from entire sample in March (monthly match eliminated).