

ASSOCIATED PRESS



NATIONAL SURVEY OF EMPLOYERS ON THE LOWER-WAGE WORKFORCE

Conducted by The Associated Press-NORC Center for Public Affairs Research with major funding from The Hitachi Foundation, The Joyce Foundation, and NORC at the University of Chicago

Interview dates: Nov. 12, 2012 – Jan. 31, 2013
Interviews: 1,487 employers with at least three employees and at least one lower wage employee

Margin of error: +/- 4.5 percentage points at the 95% confidence level

NOTE: All results show percentages among all respondents, unless otherwise labeled.

Q1: Name of organization. (Confidential)

Q2: Roughly, how many employees does your organization employ in total, full or part-time, at this and other locations of your organization? Include all employees on the organization's payroll. Do not include contractors. If you do not know exactly, your best estimate is fine.

	AP-NORC
	11/12/12 -
	1/31/13
1-5 Employees	33
6-9 Employees	19
10-49 Employees	31
50-99 Employees	5
100-199 Employees	4
200-499 Employees	2
500-999 Employees	1
1,000-1,999 Employees	1
2,000-9,999 Employees	1
10,000 Employees or More	1
Don't know	1
Refused	1

Q3: Of your total employees, what percentage of employees earn less than a full-time equivalent wage of \$35,000 per year? That is equivalent to an hourly employee who earns \$19.23 per hour for a 35 hour work week. If you do not know exactly, your best estimate is fine.

IF DON'T KNOW: Show response categories.

	AP-NORC
	11/12/12 -
	1/31/13
Less than 5 percent	16
Between 5 and 9 percent	6
Between 10 and 24 percent	11
Between 25 and 49 percent	11
Between 50 and 74 percent	15
75 percent or more	36
Don't know	2
Refused	3



We are interested in understanding your company's or organization's programs, policies, and procedures for the training and advancement of workers who earn less than a full-time equivalent wage of \$35,000 per year or \$19.23 per hour for a 35 hour work week. We are interested in workers at all locations of the organization. Throughout the survey, we refer to these workers as "lower-wage workers."

Q4: Over the past four years, has the size of your organization's <u>total workforce</u> increased, stayed about the same, or decreased?

	AP-NORC 11/12/12 -
	1/31/13
Increased	26
Stayed about the same	51
Decreased	22
Don't know (DO NOT READ)	*
Refused (DO NOT READ)	*

Asked of those who said "Increased" in Q4

Q4A: How much has the size of your <u>total workforce</u> increased over the past four years? If you do not know exactly, your best estimate is fine.

	AP-NORC
	11/12/12 -
	1/31/13
Increased less than 10 percent	19
Increased between 10 and 24 percent	32
Increased between 25 and 49 percent	29
Increased between 50 and 74 percent	10
Increased more than 75 percent	9
Don't know	1
Refused	-



Asked of those who said "Decreased" in Q4

Q4B: How much has the size of your <u>total workforce</u> decreased over the past four years? If you do not know exactly, your best estimate is fine.

	AP-NORC 11/12/12 - 1/31/13
Decreased less than 10 percent	15
Decreased between 10 and 24 percent	35
Decreased between 25 and 49 percent	28
Decreased between 50 and 74 percent	14
Decreased more than 75 percent	5
Don't know	3
Refused	*

Q5: Over the past four years, has the size of your organization's <u>lower-wage workforce</u> increased, stayed about the same, or decreased?

	AP-NORC
	11/12/12 -
	1/31/13
Increased	22
Stayed about the same	62
Decreased	14
Don't know (DO NOT READ)	*
Refused (DO NOT READ)	1

Asked of those who said "Increased" in Q5

Q5A: How much has the size of your <u>lower-wage workforce</u> increased over the past four years? If you do not know exactly, your best estimate is fine.

	AP-NORC
	11/12/12 -
	1/31/13
Increased less than 10 percent	25
Increased between 10 and 24 percent	31
Increased between 25 and 49 percent	23
Increased between 50 and 74 percent	9
Increased more than 75 percent	10
Don't know	2
Refused	-





Asked of those who said "Decreased" in Q5

Q5B: How much has the size of your <u>lower-wage workforce</u> decreased over the past four years? If you do not know exactly, your best estimate is fine.

	AP-NORC
	11/12/12 -
	1/31/13
Decreased less than 10 percent	22
Decreased between 10 and 24 percent	28
Decreased between 25 and 49 percent	28
Decreased between 50 and 74 percent	11
Decreased more than 75 percent	6
Don't know	6
Refused	-

Q6A: Over the next four years, do you expect the size of your organization's <u>total workforce</u> to increase, stay about the same, or decrease?

	AP-NORC
	11/12/12 -
	1/31/13
Increase	34
Stay about the same	56
Decrease	6
Don't know (DO NOT READ)	4
Refused (DO NOT READ)	*

Q6B: Over the next four years, do you expect the size of your organization's <u>lower-wage</u> workforce to increase, stay about the same, or decrease?

	AP-NORC
	11/12/12 -
	1/31/13
Increase	28
Stay about the same	59
Decrease	10
Don't know (DO NOT READ)	4
Refused (DO NOT READ)	*



Q7: Please approximate the level of employee turnover among your lower-wage workforce each year? By employee turnover, we mean the number or percentage of workers who leave an organization and are replaced by new employees.

	AP-NORC
	11/12/12 -
	1/31/13
Less than 5 percent	49
Between 5 and 9 percent	11
Between 10 and 24 percent	20
Between 25 and 49 percent	11
Between 50 and 74 percent	3
75 percent or more	2
Don't know	3
Refused	1

We are interested in understanding the use of contractors to perform lower-wage jobs for the organization. We are distinguishing between lower-wage jobs that involve <u>support services</u> such as custodial and copy-room services, and lower-wage jobs that involve <u>functions core to the business</u> such as when retailers contract out warehousing functions.

Q8: How many of your organization's lower-wage jobs that involve <u>support services</u> are performed by contractors?

	AP-NORC
	11/12/12 -
	1/31/13
All/Most	6
All	2
Most	4
Some	6
Only a few/None	85
Only a few	18
None	67
Don't know	3
Refused	*



Q9: How many of your organization's lower-wage jobs that involve <u>core business functions</u> are performed by contractors?

	AP-NORC
	11/12/12 -
	1/31/13
All/Most	5
All	3
Most	3
Some	6
Only a few/None	87
Only a few	17
None	70
Don't know	2
Refused	*



Q10: Which of the following benefits are available to your employees?

Q10A: Is this benefit available to any employees at your organization or not?

Q10B: IF AVAILABLE TO ANY: Is this benefit available to all lower-wage workers, all lower-wage workers but only after new employee probationary period, only some lower-wage workers, or no lower-wage workers?

			Q10B asked if Q10A=YES							
			All lower-							
			wage							
			workers, but							
			only after	Only				Q10A.		
	Q10A.	All	new	some	No			Not		
	Available	lower-	employee	lower-	lower-			available		
AP-NORC 11/12/12 -	to any	wage	probationary	wage	wage			to any		
1/31/13	employee	workers	period	workers	workers	DK	REF	employee		
Paid vacation	73	28	43	17	11	1	*	26		
Paid holidays	67	43	31	19	7	1	*	32		
Regular performance	66	73	19	7	1	1	*	32		
evaluations	00	/3	19	/	1	1		32		
Paid sick days	55	29	39	17	14	1	*	44		
A health plan or	54	30	42	18	9	1	*	44		
medical insurance	54	30	42	18	9	Т		44		
A retirement	35	30	49	12	8	1	*	63		
program	33	30	49	12	0	1		03		
Dependent care										
flexible savings plan	14	32	42	19	5	2		84		
or child care	14	52	42	19	3		-	04		
assistance										



Q11: For each statement, please tell me if you strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree.

RANDOMIZE ORDER

				Neither agree					
	Total	Strongly		nor	Total		Strongly		
AP-NORC 11/12/12 - 1/31/13	agree	agree	Agree	disagree	disagree	Disagree	disagree	DK	Ref.
Your organization's lower-wage workers have regular shifts or hours from week to week.	82	42	40	5	12	8	3	1	*
Your organization's lower-wage workers have the skills and experience to do their jobs well.	81	27	54	12	5	4	1	1	*
Your organization has trouble finding people with good skills or experience for lower-wage positions.	44	15	28	16	40	29	10	1	*

Q12: When most lower-wage workers are hired at your organization, how prepared are they to do the work?

	AP-NORC
	11/12/12 -
	1/31/13
Completely/Very prepared	22
Completely prepared	6
Very prepared	16
Somewhat prepared	49
A little/Not at all prepared	27
A little prepared	19
Not at all prepared	8
Don't know	1
Refused	*



RANDOMIZE Q13 and Q14

Q13: How confident are you that your current lower-wage employees have the needed capabilities to be trained to keep up with the new technologies and skills required for their job?

	AP-NORC
	11/12/12 -
	1/31/13
Extremely/Very confident	47
Extremely confident	16
Very confident	31
Moderately confident	35
Not too/Not at all confident	8
Not too confident	6
Not confident	2
We do not anticipate any new technology and skill	9
requirements for our lower-wage jobs	
Don't know	1
Refused	*

Q14: How confident are you that your organization will be able to invest in training your current lower-wage employees to keep up with the new technologies and skills required for their job?

	AP-NORC
	11/12/12 -
	1/31/13
Extremely/Very confident	49
Extremely confident	16
Very confident	33
Moderately confident	30
Not too/Not at all confident	8
Not too confident	5
Not confident	3
We do not anticipate any new technology and skill	11
requirements for our lower-wage jobs	11
Don't know	1
Refused	*



RANDOMIZE ORDER OF Q15 and Q16

Q15: How important do you believe <u>job training</u> is to advancing the careers of lower-wage workers?

	AP-NORC
	11/12/12 -
	1/31/13
Extremely/Very important	83
Extremely important	43
Very important	39
Moderately important	11
Slightly/Not at all important	6
Slightly important	4
Not important	1
Don't know	1
Refused	*

Q16: How important do you believe <u>general education</u> is to advancing the careers of lower-wage workers?

	AP-NORC
	11/12/12 -
	1/31/13
Extremely/Very important	77
Extremely important	37
Very important	39
Moderately important	16
Slightly/Not at all important	7
Slightly important	5
Not important	1
Don't know	1
Refused	*



Q17: For the following questions, we are interested in programs or benefits your organization offers to its lower-wage workers.

Q17A: Is this program or benefit available to any employees at your organization or not?

Q17B: IF AVAILABLE TO ANY: If Is this program or benefit available to lower-wage workers or not?

		Q17B Asked if Q17A=YES				
AP-NORC 11/12/12 - 1/31/13	Q17A. Available to any	Yes	No	Don't know	Refused	Q17A. Not available to any
Coaching or mentoring	66	97	2	1	*	31
On the job training or apprenticeships (NOT including orientation for new workers or new protocols/operating procedures)	61	95	4	1	*	37
Online training or classes	39	94	5	1	-	59
Training for a credential or certificate	37	88	11	1	*	61
Reduced work hours or requirements to attend training or classes	37	92	7	1	-	59
Career advising	24	96	3	*	*	73
Tuition assistance	18	88	9	4	*	80
Onsite education like GED or ESL classes	3	89	11	-	-	95

Asked if Q17B=YES for each respective benefit

Q17C: Please approximate the percentage of lower-wage workers who participate in this program or benefit

		Between	Between	Between	75% or	Don't	
AP-NORC 11/12/12 - 1/31/13	<10%	10-24%	25-49%	50-74%	more	know	Refused
Tuition assistance (N=452)	58	18	9	6	6	2	-
Onsite education like GED or ESL classes (N=86)	54	22	9	5	8	2	-
Reduced work hours or requirements to attend	43	14	10	10	22	1	*
training or classes (N=620)	45	14	10	10	22	1	-
Training for a credential or certificate (N=569)	33	16	10	11	28	3	-
Career advising (N=379)	31	20	17	9	18	4	1
Online training or classes (N=639)	29	12	13	7	37	2	1
On the job training or apprenticeships (NOT							
including orientation for new workers or new	22	14	11	8	43	2	*
protocols/operating procedures) (N=847)							
Coaching or mentoring (N=972)	22	16	11	11	39	1	*





Asked if Q17B=YES for each respective benefit

Q17D: How effective is this program or benefit for meeting your organization's training objectives?

					A little/Not				
AP-NORC 11/12/12 -	Total	Extremely	Very	Moderately	too	A little	Not too		
1/31/13	effective	effective	effective	effective	effective	effective	effective	DK	Ref.
On the job training or apprenticeships (NOT including orientation for new workers or new protocols/operating procedures) (N=847)	70	24	46	25	4	2	2	*	1
Coaching or mentoring (N=972)	67	23	44	26	5	3	2	1	-
Training for a credential or certificate (N=569)	61	28	33	28	9	5	4	2	-
Online training or classes (N=639)	44	14	30	36	17	12	5	2	1
Reduced work hours or requirements to attend training or classes (N=620)	40	12	29	34	21	11	9	3	2
Tuition assistance (N=452)	36	13	23	23	35	12	23	5	1
Onsite education like GED or ESL classes (N=86)	35	6	29	37	22	9	13	*	5
Career advising (N=379)	34	15	19	34	29	17	12	2	1





Asked only if "YES" on at least 1 item in Q17B

Q18: Why does your organization invest in training or education programs or benefits for lower-wage workers? [CHECK ALL THAT APPLY] Multiple responses possible, percentages sum to greater than 100%.

RANDOMIZED ORDER

	AP-NORC
	11/12/12 -
	• •
	1/31/13
Improve the quality of products or services produced	69
Retain current workers	61
To meet skill needs resulting from changes in products	C1
or services	61
Reduce employee turnover	52
Meet the demand of changing technologies	49
Fulfill an organizational commitment to advancing	22
lower-wage workforce	32
Attract new workers	23
Other, please specify	12
Don't know	2
Refused	3

n=1,349

Q19: How has your organization's budget for training and education programs and benefits for lower-wage workers changed over the past four years?

	AP-NORC
	11/12/12 -
	1/31/13
Total increased	18
Increased a lot	6
Increased a little	12
Stayed about the same	41
Total decreased	8
Decreased a little	3
Decreased a lot	5
Our organization does not have a budget for training and education programs and benefits for lower-wage workers	28
Don't know	4
Refused	1



Q20: For the following statement, please tell me if you strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree ... The lower-wage workers who would benefit the most from training programs are the least likely to participate.

	AP-NORC
	11/12/12 -
	1/31/13
Total agree	34
Strongly agree	10
Agree	24
Neither agree nor disagree	24
Total disagree	37
Disagree	27
Strongly disagree	11
Don't know	4
Refused	1

Q21: What, if anything, does your organization do to increase the participation of lower-wage workers who would benefit the most from training programs and benefits? [CHECK ALL THAT APPLY] Multiple responses possible, percentages may sum to greater than 100%.

RANDOMIZE ORDER

	AP-NORC
	11/12/12 -
	1/31/13
Discuss programs and opportunities with individual workers during	40
performance or other periodic reviews	
Require certain skills or credentials for promotion or advancement,	24
sometimes called "pay for skills" programs	24
Conduct targeted outreach to individual lower-wage workers	20
Our organization does nothing to increase the participation of	
lower-wage workers who would benefit the most from training	23
programs and benefits	
Conduct general outreach about programs to the lower-wage	17
workforce	17
Conduct targeted outreach to specific groups of lower-wage	11
workers	
Work with unions or employee associations to conduct outreach	5
about programs to the lower-wage workforce	
Other, please specify	13
Don't know	7
Refused	3

n=1,487





Q22: Overall, how much opportunity is there for lower-wage workers to advance to a higher position that pays more at your organization?

	AP-NORC
	11/12/12 -
	1/31/13
A great deal/Some	59
A great deal	24
Some	35
A little/No opportunity	39
A little	25
No opportunity	13
Don't know	1
Refused	1

Q23: During your last fiscal year, what percentage of <u>all employees</u> did your organization promote to a position that pays more? Please specify as a percentage of the total number of employees.

IF DON'T KNOW: Show response categories.

	AP-NORC
	11/12/12 -
	1/31/13
Less than 5 percent	16
Between 5 and 9 percent	9
Between 10 and 24 percent	20
Between 25 and 49 percent	12
Between 50 and 74 percent	4
75 percent or more	5
Don't know	5
Refused	29



Q24: During your last fiscal year, what percentage of <u>lower-wage workers</u> did your organization promote to a position that pays more? Please specify as a percentage of the total number of lower-wage workers.

IF DON'T KNOW: Show response categories.

	AP-NORC
	11/12/12 -
	1/31/13
Less than 5 percent	16
Between 5 and 9 percent	8
Between 10 and 24 percent	18
Between 25 and 49 percent	10
Between 50 and 74 percent	4
75 percent or more	5
Don't know	7
Refused	33

Q25: Over the last five years, has the pay of lower-wage workers at your organization increased rapidly, made steady advances, stayed about the same, or lost some ground?

	AP-NORC
	11/12/12 -
	1/31/13
Increased rapidly	3
Made steady advances	39
Stayed about the same	50
Lost some ground	5
Don't know	2
Refused	1



Q26: Has your organization ever participated with any government or publicly-funded employee training or education programs or not?

	AP-NORC
	11/12/12 -
	1/31/13
Yes, my organization has participated in publicly-	11
funded employee training or education programs	11
No, my organization has not participated in publicly-	86
funded employee training or education programs	60
Don't know	4
Refused	*

Asked only of those who said "Yes" in Q26

Q27: How has your organization participated with government or publicly-funded employee training or education programs? [CHECK ALL THAT APPLY] *Multiple responses possible, percentages may sum to greater than 100%.*

RANDOMIZED

	AP-NORC
	11/12/12
	- 1/31/13
Engaged in a public-private partnership to provide skills development and	41
training	41
Receiving funding through state or local employment programs	40
Receiving funding through federal employment programs	26
Engaged in a public-private partnership to provide general education including	24
GED or other high school equivalency courses	24
Other, please specify	16
Don't know	2
Refused	1

n=283





Asked only of those who said "No" in Q26

Q28: Why hasn't your organization participated with government or publicly-funded employee training or education programs? [CHECK ALL THAT APPLY] *Multiple responses possible, percentages may sum to greater than 100%.*

RANDOMIZED

	AP-NORC
	11/12/12
	- 1/31/13
Not aware of any programs aimed at our business sector	50
Not aware of any programs operating in my geographic area	40
Not enough demand for training and education programs among employees	26
Not enough resources to support participation in the programs	22
Prior bad experience with a program	3
Programs require too much red tape	14
Not eligible to participate in any programs	11
Programs are not effective	6
Other, please specify	12
Don't know	4
Refused	1

n=1,089

Q29: Has your organization ever used any of the following or not?

AP-NORC 11/12/12 - 1/31/13	Yes	No	DK	Ref.
Job search or placement websites such as Careerbuilder.com or Monster.com	29	69	2	*
Community Colleges	27	71	2	*
Temporary placement agencies that promise permanent positions	23	75	2	*
For-profit training programs or schools like The University of Phoenix, ITT Technical Institute, DeVry University, or Strayer University	6	92	2	*
Day laborer pools	6	91	2	*





Q30: How much of the responsibility do you think each of the following groups share for helping workers get ahead in their careers?

AP-NORC	A lot/Almost								
11/12/12 -	all	Almost	Α	Moderate	Little/ No		No		
1/31/13	responsibility	all	lot	Amount	responsibility	A little	Responsibility	DK	Ref.
The individual worker	81	48	32	9	9	7	1	1	*
Colleges	52	8	43	29	17	12	5	2	*
Employers	43	6	36	35	20	16	4	2	*
High schools	43	6	38	28	26	20	6	2	*
Mentors including coworkers, teachers and supervisors	40	4	36	37	21	18	3	2	*
Friends and family	38	4	35	34	26	20	6	2	*
State or local governments	10	2	8	19	64	28	36	6	1
Unions	9	1	8	17	52	15	37	19	2
The U.S. Government	9	1	8	17	65	27	38	7	2



ORGANIZATION PROFILE:

Q31: Please indicate whether your company is a government entity, a private for-profit company, or a not-for-profit company.

	AP-NORC
AP-NORC 11/12/12 -	11/12/12 -
1/31/13	1/31/13
Government entity	2
Private for-profit company	86
A not-for-profit company	9
Don't know	1
Refused	1

Q32: Please indicate your organization's industry classification.

	AP-NORC
	11/12/12 -
	1/31/13
Service, retail or wholesale	58
Healthcare	17
Manufacturing	9
Other	14
Don't know	1
Refused	1

Q33: What types of work do lower-wage workers do at your organization? [CHECK ALL THAT APPLY] Multiple responses possible, percentages may sum to greater than 100%.

	AP-NORC
	11/12/12 -
	1/31/13
Service	78
Clerical	65
Sales or Retail	52
Management	29
Technology	23
Manufacturing	17
Farming or Agriculture	5
Construction	9
Other	6



Q34: Are any of your organization's <u>lower-wage workers</u> covered by a union or employee association contract?

	AP-NORC	
	11/12/12 -	
	1/31/13	
Yes	2	
No	96	
Don't know	1	
Refused	1	

Q35: In what region of the country is the majority of your organization's lower-wage workforce located?

	AP-NORC
	11/12/12 -
	1/31/13
Midwest U.S.	27
Southern U.S.	27
Northeast U.S.	22
Western U.S.	18
Spread across the U.S.	4
Don't know	2
Refused	*

RESPONDENT INFORMATION

Q36: What is your current title or position?

	AP-NORC
	11/12/12 -
	1/31/13
President/Executive Director/CEO/COO/CFO/Partner	47
Human Resources	4
Employee Training or Workforce Development	1
Other	42
Don't know	*
Refused	6



Q37: How long you have been employed by this company?

	AP-NORC
	11/12/12 -
	1/31/13
A year or less	5
Over 1 year to less than 5 years	13
5 years to less than 10 years	23
10 years to less than 20 years	26
More than to 20 years	33
Don't know	-
Refused	1



Study Methodology

This survey was conducted by The Associated Press-NORC Center for Public Affairs Research with major funding from The Hitachi Foundation, the Joyce Foundation, and NORC at the University of Chicago. The survey was conducted from November 12, 2012 through January 31, 2013. NORC staff collaborated on all aspects of the study, with input from NORC's Economics, Labor, and Population Studies Department and AP's subject matter experts.

This nationally representative survey of employers was conducted via web and telephone with 1,487 employers with at least three employees and at least one lower-wage worker defined as an employee making \$35,000 per year, full-time equivalent, or less. NORC selected the sample of businesses from the Dun and Bradstreet business database. The sample was stratified by business size (3-9 employees, 10-199 employees, and 200 or more employees) and sector (manufacturing, health, retail, service and wholesale, other). A systematic sample was selected from each of the twelve strata with equal probability.

Number of Completed Interviews per Stratum

Number of Employees	Туре	Completes
3-9	Manufacturing	112
3-9	Healthcare	105
3-9	Service/retail/wholesale	101
3-9	Other	225
10-199	Manufacturing	105
10-199	Healthcare	126
10-199	Service/retail/wholesale	106
10-199	Other	113
200+	Manufacturing	107
200+	Healthcare	147
200+	Service/retail/wholesale	106
200+	Other	134
TOTAL		1487

Interviews were completed over the telephone by professional interviewers who were carefully trained on the specific study (826) and through an online survey (661). Respondents were offered a \$50 monetary incentive for participating, as compensation for their time. The final response rate was 16 percent, based on the American Association for Public Opinion Research (AAPOR) response rate 1 method. The overall margin of error was +/- 4.5 percentage points, taking into account the complex sample design.





The sample was weighted to adjust for unequal sampling probabilities across strata, unknown eligibility, nonresponse, and regional distribution. The base weight reflects the selection probabilities under the sample design. The base weight was then adjusted to compensate for records that are of unknown eligibility and for nonresponse. Finally, a poststratification adjustment was applied to the weight to adjust the regional distribution of the sample. The weighted data, which thus represent the target population, were used for all analyses.

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The two organizations have established the Associated Press-NORC Center for Public Affairs Research to conduct, analyze, and distribute social science research in the public interest on newsworthy topics, and to use the power of journalism to tell the stories that research reveals.

The founding principles of the AP-NORC Center include a mandate to carefully preserve and protect the scientific integrity and objectivity of NORC and the journalistic independence of The Associated Press. All work conducted by the Center conforms to the highest levels of scientific integrity to prevent any real or perceived bias in the research. All of the work of the Center is subject to review by its advisory committee to help ensure it meets these standards. The Center will publicize the results of all studies and make all datasets and study documentation available to scholars and the public.



