About NORC

The National Opinion Research Center (Colorado), hereinafter referred to as “NORC,” is pleased to provide research services to federal and other eligible clients under the Professional Services Schedule (PSS) (00CORP) SIN 874-1 (Integrated Consulting Services).

Founded in 1941, NORC is a social science and public policy research organization that pursues research to help resolve issues facing society through high-quality data collection and interpretation using advanced statistical and other analytic techniques. NORC expands the reach and power of social science research by engaging in technical assistance activities that support the aims of government and private agencies and organizations that collect and use data for program and research purposes. NORC has offices in Chicago; Bethesda, Maryland; San Francisco; Boston; and Atlanta. NORC’s contact center for conducting telephone interviews and data preparation is located in Chicago, and NORC maintains a national field operations presence for conducting in-person surveys. NORC’s five primary areas of expertise are Economics, Markets, and the Workforce; Education, Training, and Learning; Health and Well-Being; Society, Media, and Public Affairs; and Global Development. NORC also operates a group of Academic Research Centers that support grant-funded research conducted by faculty members at the University of Chicago and other universities. NORC conducts research of significance to local, regional, national, and international policymakers.

General Information

NORC is a large business with offices located at 1155 East 60th Street, Chicago, Illinois 60637; 55 East Monroe, Suite 3000, Chicago, Illinois 60603; and other locations in the U.S. NORC’s PSS contract number is GS-10F-0033M and the contract period is October 15, 2016 through October 14, 2021.

To discuss NORC’s capabilities, contact Jeff Hackett, Vice President, Office of Business Development, 312-759-4266, hackett-jeffrey@norc.org.

Services

SUMMARY OF CAPABILITIES

NORC’s expertise in the conceptualization, design, implementation, and evaluation of research programs grows out of its long history of conducting research of the highest quality in the service of government and academic institutions, and out of the experience and training of its talented and diverse staff. This document describes our capabilities in eight key areas:

1. Conceptualization of the Research Objectives and Process. Critical activities take place at the earliest stages of a research project. NORC relies on the knowledge and experience of its own highly skilled staff members and turns to the faculty scholars at the University of Chicago as it undertakes the first steps that define and characterize a research program.
2. **Quantitative Data Collection and Data Management.** NORC is an innovator in survey design and operations, collecting data in multiple modes: in-person and via telephone, paper, and the Web. We have conducted studies with as few as 200 respondents, as well as longitudinal and cross-sectional studies with more than 90,000 respondents. NORC brings particular expertise to the collection of data on sensitive topics. NORC is deeply experienced in the collection of non-interview data, including records and transcript collection and observational approaches. NORC has pioneered the development of protocols for the collection of biological information by interviewers who are not medical professionals. NORC is consistently known to be a trusted manager of sensitive datasets that it has collected or that have been collected by other organizations.

3. **Qualitative Data Collection.** For projects that seek more nuanced information than can be collected through purely quantitative methods, NORC collects qualitative data with a variety of techniques, including structured interviews, focus groups, cognitive interviews, and site visits. We also regularly convene expert panels and stakeholder meetings for our clients.

4. **Analytic Research.** NORC’s analytic capabilities are as varied as our data collection techniques and analytic inquiry offers venues for collaboration with UChicago faculty members in appropriate disciplines. Our staff includes expert statisticians who can perform complicated statistical analysis, as well as experienced policy analysts who can assess the implications of what we learn from quantitative or qualitative data collection. In addition to primary data collection, we have expertise in secondary data analyses, including the utilization of claims data, publicly available datasets, and administrative data to answer key research questions. NORC also offers staff skilled in cost-benefit analysis, market assessments, and financial analysis.

5. **Evaluation Research and Performance Measurement.** NORC draws on all of the above capabilities to design and carry out a wide range of program evaluations, ranging from large-scale, multiyear experimental designs to working with government agencies to measure their organizational performance.

6. **Technical Assistance.** NORC has extensive experience providing technical assistance to government staff as well as to the grantees of government- and foundation-funded programs. This assistance may include needs assessments, training, one-on-one problem solving, facilitating peer-to-peer learning, and assisting clients and grantees with communications strategies.

7. **Discourse and Policy Recommendations.** The power of social science research resides in its ability to contribute to public discourse and government policy, by this means improving the lives of individuals and the functioning of society. NORC’s skilled research staff members, often in concert with faculty members of the UChicago and other universities and research centers, apply the knowledge gained in careers in research and scholarly activity to social science data, yielding specialized publications in peer-reviewed and other literature, reports to Congress and the executive branch, and varied stories in the general interest media. Advancing public and professional discourse is at the heart of NORC’s founding purposes first articulated in 1941.

8. **Auxiliary and Support Services.** NORC offers varied support capacities, notably translation of survey instruments and other documents, Web site development and maintenance support, and a staff of publication development and production professionals.

In short, NORC has the resources and expertise necessary for designing and conducting virtually any type of data collection or analysis, and we can assist our clients and their grantees in a wide variety of other ways as well. The following sections provide more detail on NORC's approaches in each of the eight areas listed.
above. To learn more about any of NORC’s capabilities and experience, see our website at www.norc.org, or contact Jeff Hackett in the Office of Business Development at (312) 759-4266 or hackett-jeffrey@norc.org.

1. Conceptualization of the Research Objectives and Process

Critical activities take place at the earliest stages of a research project, including the identification of the issues of interest, the formulation of the research questions, investigation of prior research, selection of methods and approaches, and steps to ensure the comparability of the project to prior research and the utility of anticipated findings to potential future research. In conceiving a research project and devising the research process, NORC relies on the knowledge and experience of its own highly skilled staff members and turns to the faculty scholars at the University of Chicago. Similarly, UChicago faculty members know that they can turn to NORC experts for consultation at any point in project development or implementation.

2. Quantitative Data Collection and Data Management

Since its inception, NORC has been a leader in the advancement of survey methods for quantitative data collection. Our survey experts can not only work on surveys to be conducted by NORC, but can also consult with clients on internal survey development and implementation.

NORC’s experience ranges from small studies to larger longitudinal and cross-sectional studies, and includes multiple data collection modes. Our range of expertise means we are particularly adept at helping clients evaluate the trade-offs between various survey modes and at identifying the optimal approach to data collection given a client’s research needs, available resources, characteristics of the respondent population, and survey complexity. We survey an array of respondents, including individuals and organizations, and cover a range of general topics as well as very sensitive subjects such as drug use, finances, and sexual history. Key capacities include:

**Survey instrument development.** NORC’s survey design and operations staff is skilled at translating a set of research questions into specialized, deliberately crafted survey instruments. We review all questions carefully to assure the instrument’s cognitive stability, readability, question sensitivity, format, grammar, and appropriateness to mode.

**Sample design and weighting.** NORC maintains a national area probability sample that represents the household population of the United States. We can also work with clients to design more specific samples that meet a project’s needs. NORC statisticians are skilled at computation of weights and variances that will allow the analysis to take into account these aspects of the study design.

**In-person interviewing.** NORC’s highly trained in-person interviewing staff of approximately 1,400 individuals around the country is one of our most highly prized assets. The field interviewer staff comes from a wide variety of backgrounds, and we leverage this diversity to support high completion rates across a spectrum of target populations and communities. For every survey, interviewers receive project-specific training and detailed instruction materials.

**Telephone interviewing.** NORC’s state-of-the-art telephone survey and support center has more than 400 stations equipped for computer-assisted telephone interviewing (CATI). Online audio and visual monitoring and audio recording (computer-assisted recorded interviewing or CARI) allows our supervisors to guarantee high quality in the interviewing process. Our telephone system supports industry standard dialing modes, as well as “hybrid dialing,” a methodological and technological advance used solely at NORC to maximize cost efficiencies while maintaining quality interviewer-respondent interaction. Hybrid dialing combines traditional “predictive” and “preview” dialing approaches to facilitate greater interaction with respondents and ultimately reduce the hours required to complete a case, delivering significant cost savings to NORC’s clients.
Mail surveys. NORC’s long-standing expertise with pencil-and-paper-based (PAPI) surveys focuses not only on technical aspects of instrument design (e.g., ensuring appropriate response categories, maximizing comprehension), but also on reducing respondent burden by use of optimal design. Our approach includes professional layout and printing as well as high-quality mail-out and receipt control procedures. In capturing PAPI data, NORC supports both keyed data entry and high speed optical scanning.

Web surveys. With the rapid expansion of Internet access and technology, surveys are increasingly fielded via the Web. NORC has experience fielding surveys of varying complexity to diverse audiences using both commercial Web survey applications and custom-built Web survey applications developed by NORC’s Information Technology (IT) group. NORC can offer respondents multiple options for survey completion (e.g., paper, Web, and telephone).

Sensitive questions and hard-to-survey populations. NORC excels at obtaining high-quality data and achieving high response rates from populations sometimes hard-to-reach or hard to survey. Recent work has includes surveys of older adults on topics that include health and sexual behavior, racial and ethnic minorities on health topics, young people recently out of foster care on life experiences and prospects, immigrants, and high-income individuals on financial issues. NORC also has particular expertise in the collection of longitudinal data. NORC’s careful, respectful approach to respondents of longitudinal surveys, an approach anchored in careful training and regular supplemental training, has yielded high retention rates for projects of more than 30 years duration. NORC has also been able to re-energize projects with lengthy gaps in respondent contact though systematic, sophisticated locating efforts.

Non-interview data. NORC has broad capacity in the collection of non-interview data for varied purposes, including the collection of medical records and academic transcripts, the creation of observational protocols, and the gathering of biological samples or biomarkers, and environmental samples.

Data preparation. NORC’s data preparation group processes paper and electronic questionnaires and other survey documents, including data entry, coding, editing, and preparation of computer datafiles. NORC combines the Data Dictionary system data with the frequency data to produce the input file for the NORC codebooks. At the same time, the position information contained in the Data Dictionary database is used to create interim datafiles.

Data management and storage. NORC is responsible for the receipt and collection of sensitive data on a large number of projects for the federal government and other clients. We focus on advanced methodologies to manage vast amounts of data while maintaining high security. This work is enabled by very large and expandable Storage Area Networks (SANs), relational database management systems, Internet-enabled applications, high capacity back-up infrastructure, and the use of virtual servers.

Data enclaves and management of sensitive data. NORC is a leader in the development and management of data in a protected environment. The NORC Data Enclave is a tool that allows the sharing, among a closed community of researchers, of datasets that are too sensitive to share broadly. The NORC Data Enclave archives, curates, and indexes the data; provides researchers remote and onsite secure access to the data; and statistically protects confidential information. In addition, the NORC Data Enclave manages an active outreach program to inform the national research community of the data and to foster the use of the data in research leading to conference presentations and journal publications. The Data Enclave also has an extensive education and training program to ensure appropriate use and disclosure of the data, including its confidentiality.
3. **Qualitative Data Collection**

Qualitative data collection can be used as a stage in survey design or as an independent source of qualitative data. NORC collects qualitative data with a variety of techniques. In all cases, we work closely with our clients to ensure the information we collect will answer their needs. Key capabilities include:

**Structured interviews.** NORC staff frequently conducts one-on-one interviews with a wide variety of respondents, from government officials and subject-matter experts to individuals participating in programs we are evaluating. Structured interviews allow us to gather rich qualitative information through open-ended conversation, while also gathering certain answers in a format that can be compiled and compared across different interviewees. Toward that end, NORC develops detailed protocols to ensure that the information gathered will be as useful as possible. We have well-established procedures for coding qualitative data and resolving discrepancies.

**Focus groups.** The interactive nature of a focus group often encourages a richer discussion than would have been possible in individual interviews. NORC provides its own focus group facilitators, drawing on our staff members who have both the subject-matter expertise and the facilitation skills to professionally manage the conversation. Although we start with carefully designed protocols, the focus group environment requires facilitators to continuously make judgments about when to ask follow-up questions, when to allow participants to veer off the intended topic, and how to bring the conversation back to ensure that the group covers all questions in the protocol.

**Cognitive interviewing.** Cognitive pretests are an important innovation in the development and testing of survey questionnaires that has emerged over the last 20 years. Its chief strength is in providing a structured methodology for ascertaining whether the respondent has understood the questions in the way the researchers intend them to be understood, and to assess the ability of the respondents to provide meaningful, accurate, and honest information. A cornerstone of NORC’s instrument development capabilities, cognitive interviewing is done through the administration of questions by a specially trained and experienced cognitive interviewer, followed by probes to ascertain comprehension, memory, judgment processes, and topic sensitivity. A secondary purpose is to make sure that issues pertinent to the research are covered adequately.

**Case studies and site visits.** NORC team members have conducted case studies in numerous projects for clients when seeking to explore a phenomenon within its real-life context. These projects often use multiple data collection methods (including focus groups, interviews, questionnaires, and direct observations) to examine a system of action, considering all the relevant groups of actors and the interactions between them. This methodology allows researchers to triangulate across data types and sources, arriving at a fuller picture of a given system or phenomenon within a given population.

**Convening expert panels and stakeholder meetings.** NORC regularly convenes meetings of stakeholders or experts for clients who require input or guidance; we also convene Technical Advisory Groups to guide many of our own projects. These meetings may be as small as a panel of ten experts, or as large as an auditorium of hundreds seeking to make public comments. The success of these meetings begins with careful planning, preparation, and background materials. This preparation is augmented by the high-quality facilitators we offer, who have a combination of subject-matter knowledge and facilitation skills. For expert panels, we often offer one of NORC’s Senior Fellows as a facilitator; these nationally recognized experts command the respect of panel members and bring exceptional insight to the issues of the day.

4. **Analytic Research**

From literature reviews to policy option papers, NORC researchers and analysts, often in collaboration with UChicago faculty members, engage in all aspects of public policy research and analysis. This work is
frequently complemented by quantitative analysis, cost-benefit analysis, market assessments, financial analysis, and other techniques. We are skilled at translating the results of any of these analyses into meaningful messages for the full spectrum of stakeholders. In addition to high-quality reports and publications, these efforts may include the creation of executive summaries, compelling audio/visual presentations, or a variety of other materials for delivering take-home messages on study results to the general public. Key capabilities include:

**Applied statistical analysis.** NORC statistical experts are skilled in the full range of statistical techniques for analyzing data, including exploratory data analysis; descriptive statistics, comparative analysis of subgroups, and multivariate analysis; other forms of modeling, including survival analysis and hierarchical linear modeling; and weighting, imputation, and other techniques for producing robust, unbiased statistical results. NORC has extensive experience conducting a wide variety of quantitative analyses using numerous databases. The NORC team also has substantial experience linking administrative data with primary and secondary data from a variety of sources.

**Cost-effectiveness and cost-benefit analyses.** Cost-effectiveness or cost-benefit analyses offer policymakers a unique way to evaluate whether a particular policy or program is worthwhile. NORC works to thoroughly identify and quantify all relevant costs and benefits, both direct and indirect. To the extent possible, these are converted to a single metric for comparison purposes. NORC staff also seeks to account for the vast uncertainties that can be present in this type of analysis by using sensitivity analyses, Monte Carlo simulations, or similar techniques.

**Policy analysis.** NORC routinely conducts policy assessments for a range of federal clients. The nature of these analyses varies widely, from background research on a particular topic to a catalog of state policies, to developing and analyzing a variety of options for addressing a given challenge, to assessing the likely impact of a policy change. These projects may involve the collection or analysis of qualitative and quantitative data, or they may focus on a review of literature or the knowledge of a particular expert at NORC.

**Market assessment studies.** Our clients often have a substantial interest in understanding and anticipating trends in markets relevant to their interests. Conducting market assessments often requires using creative methods to find unpublished information through structured interviews and internal industry documents. For these studies, our clients will benefit from the extensive industry contacts of our staff members.

**Financial analysis.** NORC has extensive experience analyzing financial data for clients, ranging from the evaluation of community impact of for-profit hospital conversions to assessing the accuracy of Individual Indian Trust accounts for the Bureau of Indian Affairs. The unique strength of the NORC team is its ability to apply a combination of traditional approaches to program and policy evaluations with pragmatic financial management and accounting expertise. In addition to traditional financial tools and measures, we have used multivariate analysis and financial analysis techniques to measure profitability, cash flow, liquidity, solvency, and the ability to invest in physical assets. Team members have used financial datafiles as well as other data, including audited financial statements and area resource files.

**5. Evaluation Research and Performance Measurement**

Evaluating programs requires combined knowledge of the analytic techniques involved in program evaluation and the complex policy and regulatory framework in which federal programs operate. Our team brings expertise in both areas, honed by years of experience evaluating demonstration programs for a range of federal agencies. NORC statisticians and researchers regularly undertake evaluations of social and economic programs and policies using a wide range of methods, including randomized experiments and quasi-experimental designs. We also work with clients to explore options for an evaluation design before committing to a full evaluation. Using these evaluation skills, we also have worked with several federal clients...
seeking to improve their own performance measurement in the context of the Office of Management and Budget’s Government Performance and Results Act (GPRA) requirements. Key capacities include:

**Evaluation design.** NORC works closely with clients to design evaluation methodologies. Evaluations of experimental programs or processes—whether mandated by Congress, government agencies, or developed internally by program managers—are most effective when they gather and synthesize different types of data from disparate sources, focusing analysis around the critical questions identified by the client. Often even the identification of study questions requires special processes such as planning meetings or focus groups. Once key programmatic questions are identified, rigorous processes must be developed to gather and analyze information that will shed light on the effects of funded projects and advance the state of knowledge about the effectiveness of particular interventions.

**Program assessments.** NORC also routinely conducts less formal assessments of federal programs. These assessments typically involve a review of program materials or data and the comparison of reported outcomes to program objectives. Methods used for assessments typically include analysis of secondary data generated by the program or other sources. They may also include quantitative and qualitative data collection. Outputs generally include reports outlining accomplishments, success factors, barriers to success, lessons learned, and next steps. NORC currently works with several agencies as a resource center and planning contractor, assisting with program assessments for several grant programs.

**Performance measurement.** NORC has also worked with agencies to develop data collection systems and dashboards designed to monitor and assess their grantees’ performance. The design phase is informed by first reviewing the agency’s budget, the objectives of their grant program, and their federal reporting requirements. Appropriate performance measures are then selected and detailed data collection protocols are adopted to ensure the reliability and validity of data collected. The systems developed by NORC have as a basic objective to leverage existing grantee data from progress reports and other required reports in order to minimize grantee reporting burden and data entry error. The systems are customized to ensure that agencies are able to submit their performance reports efficiently, with minimal effort and within their timeframe.

6. **Technical Assistance**

NORC’s staff is frequently asked to provide technical assistance (TA), often to the grantees of government- or foundation-sponsored programs. This may include training, problem-solving, facilitating peer-to-peer communication and learning, and providing information and communication resources. NORC staff includes a range of experts capable of providing TA on virtually any aspect of program administration, social science and evaluative research, IT implementation, and data management. In addition, NORC routinely contracts with consultants and stakeholders with expertise in a wide range of areas to extend our own expertise on TA initiatives. Key capabilities include:

**Needs assessment.** Technical assistance tasks can pose a challenge in that the sponsor of the TA is separate from the end users or recipients. In some cases, recipients are eager to receive TA and have specific, ongoing needs that are ripe to be addressed by the TA provider. In other cases, intended TA recipients need support in framing their project and identifying areas where TA can be of assistance. NORC typically conducts extensive needs assessment and introductory activities at the start of any TA initiative. Depending on the number and nature of recipients, this can involve administering questionnaires, convening recipients by phone or in person, conducting structured interviews with individual TA recipients, or a combination of these approaches. These activities are invaluable in helping to gauge the goals, objectives, and context of TA recipients, the specific needs that can be addressed by the program, and the best mechanisms to address those needs.
Training. For requests that represent common needs that are easily addressed, TA activities enabling the participation of multiple individuals, such as teleconferences or workshops, may be appropriate. These requests offer an opportunity to provide the most benefit with limited resources. NORC typically tailors training location and methods to the project at hand; this may include in-person sessions, videoconferences, or audio conferences. In particular, we have had success using Web-enabled teleconferences that allow participants to view meeting materials online while listening on the phone.

Problem solving. For topics that are specific to the situation of an individual recipient, one-on-one TA through telephone consultation or site visits may be appropriate depending on the level of need and the materiality of the request to the overall goals of the program. In general the vast majority of TA requests can be resolved by a one-on-one expert teleconference.

Peer-to-peer learning. NORC has developed and managed several online portals and listservs that allow peer-to-peer learning through document sharing and discussion forums. We have also convened Work in Progress Sessions where stakeholders share details of their projects with their peers, to dialogue on best practices and lessons learned. These tools can represent an effective avenue for TA recipients to learn from each other efficiently, particularly in groups of TA recipients who share a high level of trust with each other and are working through new and challenging issues.

National conferences and workshops. NORC has planned several major conferences for grantees of government programs. These in-person meetings offer valuable opportunities to deliver hands-on TA via presentations made in large and small settings. These activities are particularly effective when face time with experts and work in break-out groups are necessary to help TA recipients sort through complex issues.

Communications and publications. For ongoing TA projects, NORC frequently uses newsletters to efficiently convey information on a wide variety of topics to all members of the given TA community. NORC may also develop expert white papers or peer-reviewed publications that address some of the ongoing needs of, or lessons learned by, TA recipients.

7. Discourse and Policy Recommendations

Findings from NORC research fuel the public discourse and yield policy recommendations by meant that lead to lasting improvements in the lives of individuals and the functioning of society. By making research findings available in publications and datasets available in archives for further study, NORC empowers citizens, government, and the academic research community to address society’s needs. NORC research project findings have yielded widely read scholarly and popular books, comprised and contributed to reports to Congress and the executive branch, anchored articles in peer-reviewed journals and presentations at professional conferences, contributed to stories in general-interest and specialized media, and turned up in works of art. Senior NORC researchers and UChicago faculty members have shaped this discourse, applying the expertise of careers in research and scholarly activity to drawing knowledge from carefully gathered research data.

8. Auxiliary and Support Services

Translation. As part of our survey research, NORC maintains the capacity to translate and work with materials into numerous languages. As needed, survey interviewers who are multilingual are employed to appropriately administer an instrument written in languages other than English. To create an instrument the target language, we draw on both our own resources and use a number of specialized translation services. NORC favors rigorous back translation to ensure the highest quality translation possible.
Web site support work. NORC has extensive experience designing, developing, managing, and enhancing Web sites that support a wide range of functions and content topics. Working with a variety of Web development technologies, NORC has developed private extranet sites to support virtual communities, data dissemination portals, public Web sites, and data collection applications for federal clients ranging from the Agency for Healthcare Research and Quality to the National Institutes of Health to the National Science Foundation. NORC's Web sites reflect best practices in a number of disciplines including software and infrastructure engineering, user interface design and usability, and Section 508 compliance.

Production and dissemination of publications. NORC staff has produced hundreds of reports for a wide variety of clients. These reports reflect the complexity and scope of each particular project, typically including detailed sections describing background, key study questions, detailed explanations of methodology and project processes, summaries of analytic findings, and cogently framed conclusions and recommendations. These reports also include substantial appendices that reflect interim deliverables, more detailed description of specific study components, or other project materials deemed relevant by the government. In addition, our staff has substantial experience authoring reports to Congress that present the full-scope analytic findings of an evaluation in the form of discussion relevant for elected officials or Executive branch principals. NORC staff members are thoroughly familiar with the requirements of Section 508 compliance.

Presentations and briefings. Across each of our core capabilities, NORC often concludes projects with detailed presentations or targeted briefings to the client agency and other relevant stakeholders that summarizes the questions asked, methods employed, and results and programmatic conclusions or recommendations. These presentations allow the client and other relevant parties to engage NORC on project intricacies and to fully explore the project implications and next steps. To support production of reports and presentations, NORC has an impressive array of qualified staff and state-of-the-art resources. NORC’s design staff is thoroughly versed in creating, working with, and presenting charts, tables, maps and line art using page design software such as Adobe Creative Suite 5, Corel Draw, Corel Presentations, Microsoft PowerPoint, QuarkXPress, and Visio Professional.

Project Oversight
Crucial to the success of any project are the development of a project oversight structure and lines of communication that optimize the project team’s ability to get important information from the client to team members in a timely fashion, identify and solve problems quickly, and monitor quality at every stage. Working with a sponsoring agency’s project staff, NORC designs management plans tailored to the specific needs of the agency and the study. Typically, such plans designate a senior NORC researcher or survey expert as Project Director. Project Directors are seasoned research professionals with more than ten years of experience, skilled in resource and personnel management, project oversight, data quality, budgets and schedules, and client communications. Project Directors are problem solvers, adept at creating collaborative working environments.

Information Technology
NORC offers a full range of information technology, data collection, and analytic capabilities delivered in an integrated manner. NORC’s IT staff includes software developers, database and systems analysts, network engineers, business analysts, technical architects, and computer security experts. This group provides programming support to all projects, including designing, implementing, and supporting applications for data collection and analysis. A dedicated Project Management Office, including many PMI certified project managers, coordinates the complicated array of tasks required to deliver IT support. NORC also features a robust IT infrastructure, including a private high-speed WAN, secure remote access systems, secure
Internet, a fully automated and distributed high-capacity telephone survey center, and data centers equipped with high-performance servers and large capacity storage units.

NORC recently released NORCSuite 3, a proprietary Case Management System (CMS) composed of a collection of software applications and databases designed to address distributed and multimode data collection projects. NORCSuite 3 is structured on web-based architecture, similar to many commercial web sites and other enterprise applications. Programmed with Java and enhanced with open-source software, NORCSuite 3 leverages universally available architecture in order to achieve scalability and extensibility. NORCSuite 3 CMS can integrate with a variety of databases and data collection tools, including custom applications developed by other projects or research companies. NORCSuite 3 is designed to also operate securely from remote locations.

In the interest of advancing our data management capacity, NORC has implemented a data warehouse and a powerful, Web-accessible reporting and data-delivery solution for use throughout the organization, as well as by our clients. These capabilities allow timely access to project data, enabling better informed project management decision making. The integrated design of our data warehouse components eliminates costly, error-prone, and time-consuming tasks such as double entry, unloading, and reformatting.

NORC maintains a production-ready network of servers designed to reliably support all NORC activities. These include file, application, and database servers, as well as Web hosting, and a Storage Area Network (SAN) providing expandable data storage. The NORC Wide Area Network (WAN) links PC workstations attached to Local Area Networks (LANs) across all NORC offices, providing users with access to more than sufficient online disk storage, as well as the various file, print, and application servers; UNIX hosts; and high-volume laser printers. NORC’s data center is supported by an uninterruptible power supply (UPS), resulting in zero downtime in the event of power outages. In addition, the Virtual Private Network (VPN) structure links staff from remote locations throughout the United States.

NORC’s offices have voicemail, teleconferencing, and videoconferencing installations in order to facilitate formal and informal communications. All NORC office staff use high-performance, multimedia desktop PCs and the Microsoft Windows operating system. Facilities are interconnected with high-speed telecommunications for voice and data transmission. NORC remains vigilant in frequently upgrading and expanding equipment as more advanced technologies become available.

**Security**

NORC’s physical, application, and data security systems are designed to protect both the client and the survey respondent. NORC’s security program is compliant with federal government regulations and can be adapted easily to meet the unique requirements of any project.
Contract Terms

1a. Table of awarded special item number(s):
   SIN 874-1 and Disaster and Recovery SIN 874-1RC, see below

1b. Prices: See page 18 for rates. This contract includes labor prices only. Non-labor items or other direct costs (ODCs) necessary to complete services will be included in proposals and will be priced at actual costs, plus appropriate burden in accordance with NORC's current negotiated indirect rate agreement (NICRA) approved by the U.S. Department of Health and Human Services.

2. Maximum order: $1,000,000

3. Minimum order: $100

4. Geographic coverage: Domestic

5. Point(s) of production: Chicago, IL and Bethesda, MD

6. Discount from list prices or statement of net price: Negotiated per task order, when applicable

7. Quantity discounts: None

8. Prompt payment terms: 1% if paid within 15 days

9a. Government purchase cards are accepted up to the micro-purchase threshold: Yes

9b. Notification whether government purchase cards are accepted or not accepted above the micro-purchase threshold: No

10. Foreign items: Not applicable

11a. Time of delivery: As specified on individual task order

11b. Expedited delivery: Not applicable

11c. Overnight and two-day delivery: Not applicable

11d. Urgent requirements: Not applicable

12. F.o.b. points: Destination

13. Ordering address: 55 East Monroe, Suite 2000, Chicago, IL 60603

14. Payment address: 55 East Monroe, Suite 2000, Chicago, IL 60603

15. Warranty provision: None

16. Export packing charges, if applicable: Not applicable

17. Terms and conditions of government purchase card acceptance: Not applicable

18. Terms and conditions of rental, maintenance, and repair: Not applicable

19. Terms and conditions of installation: Not applicable

20. Terms and conditions of repair parts: Not applicable

20a. Terms and conditions for any other services: Not applicable

21. List of service and distribution points: Not applicable

22. List of participating dealers: Not applicable

23. Preventive maintenance: Not applicable

24. Environmental attributes: Not applicable

25. Data Universal Number System (DUNS) number: 06951 2291

26. Notification regarding registration in Central Contractor Registration (CCR) database: Registered

27. Uncompensated overtime: Not used
Labor Categories and Rates

Labor Category Descriptions

In this section, we summarize the activities undertaken by individuals in these labor categories and present labor rates.

SENIOR OFFICER
Minimum Education – Doctorate
Minimum Experience – 15 years

Function Responsibilities – Senior Officers oversee one or more research or functional departments within NORC. Senior Officers have extensive expertise in survey design and management. Senior Officers may serve as project directors or technical advisors on large and complex survey projects.

Requirements Substitution:
Minimum Education – Master’s degree
Minimum Experience – 20 years

OFFICER/DIRECTOR
Minimum Education – Master’s degree
Minimum Experience – 15 years

Function Responsibilities – The Officer/Director serves as a director of a research or functional department within NORC. The Officer/Directors have expertise in substantive areas as well as survey design and management. Officers/Directors may serve as project directors or technical advisors on large and complex projects.

Requirements Substitution:
Minimum Education – Bachelor’s degree
Minimum Experience – 17 years

PRINCIPAL RESEARCHER
Minimum Education – Doctorate
Minimum Experience – 12 years

Function Responsibilities – The Principal Researcher directs research projects and manages the activities of research assistants, analysts and other staff and provides substantive input and direction to task leaders and project directors especially regarding social science research design, questionnaire content, and data analysis.

Requirements Substitution:
Minimum Education – Master’s degree
Minimum Experience – 15 years

SENIOR RESEARCH SCIENTIST
Minimum Education – Master’s degree
Minimum Experience – 9 years

Function Responsibilities – The Senior Research Scientist directs research projects and manages the activities of research assistants, analysts and other staff. The Senior Research Scientist serves as project director with budget responsibilities on complex scientific and or technical components of large projects or a series of smaller projects.

Requirements Substitution:
Minimum Education – Bachelor’s degree
Minimum Experience – 11 years

SENIOR SURVEY DIRECTOR II
Minimum Education – Master’s degree
Minimum Experience – 6 years

Function Responsibilities – This position has multiple complex responsibilities -- 1) to direct large and complex projects or several smaller projects with support from other managers and to serve as senior project advisor to more junior staff in the role of project director and 2) to perform various administrative tasks. Incumbents in this position typically have a national reputation within the field, either through extensive publication or broad experience. This position has significant supervisory responsibilities.

Requirements Substitution:
Minimum Education – Bachelor’s degree
Minimum Experience: 8 years

SENIOR SURVEY DIRECTOR I
Minimum Education – Bachelor’s degree
Minimum Experience – 6 years

Function Responsibilities – This position has multiple responsibilities -- 1) to direct small to moderately large projects with support from Survey Directors or to manage task(s) or components of large and complex projects and 2) to perform various administrative tasks. This position has significant supervisory responsibilities.

Requirements Substitution:  
None

RESEARCH SCIENTIST
Minimum Education – Bachelor’s degree
Minimum Experience – 4 years

Function Responsibilities – The purpose of this position is to provide substantive (subject area) input and direction to task leaders and project directors, especially regarding survey design, questionnaire content, and data analysis. Project responsibilities may include task management, extensive and long-term consultation, or as the principal investigator on small analytical or survey/analysis studies.
**SURVEY DIRECTOR**

Minimum Education – Bachelor’s degree  
Minimum Experience – 4 years

Function Responsibilities – This position has extensive project management responsibilities, typically in the roles of associate project director (responsible for multiple components) or single task/component manager on large, complex projects or as project director on small projects with supervision from a senior project advisor. This position has both project and administrative supervisory responsibilities.

**RESEARCH ANALYST II**

Minimum Education – Bachelor’s degree  
Minimum Experience – 3 years

Function Responsibilities – The Research Analyst II typically provides research project support and task leadership on studies of moderate to high complexity. Responsibilities may include questionnaire design, specialized data collection procedures such as ethnographic, historical, or records synthesis; data editing and management; statistical analysis, report and paper writing.

**RESEARCH ANALYST**

Minimum Education – Bachelor’s degree  
Minimum Experience – 1 year

Function Responsibilities – This position typically provides research project support on studies of low to moderate to high complexity. Responsibilities may include assisting in questionnaire design, specialized data collection procedures such as ethnographic, historical, or records synthesis; data editing and management; statistical analysis, report and paper writing. This position typically has no budget or supervisory responsibilities.

**SURVEY SPECIALIST**

Minimum Education – Bachelor’s degree  
Minimum Experience – 1 year

Function Responsibilities – This position typically has project task management or significant production/support responsibilities. On large, complex projects, this position typically has responsibility for one task or aspect of a task, serving as a Central Office Supervisor (supervising
field and telephone interviewers, managers, or clerks), handling preparations and monitoring of one
data collection effort, or maintaining the Survey Management System. On small or moderately sized
projects, this position typically has broader responsibilities. This position has project supervisory
responsibilities.

**Requirements Substitution:**
None

**GRADUATE RESEARCH ASSISTANT**
Minimum Education – Bachelor’s degree
Minimum Experience – None

**Function Responsibilities** – The Graduate Research Assistant provides support to project directors
on research studies. Responsibilities include preparing materials and writing detailed training and
reference documents; assisting with interviewer and locator training; performing other administrative
duties. In addition, the Graduate Research Assistant will assist with the testing of the locating
system and tracking database and testing of survey instruments.

**Requirements Substitution:**
None

**RESEARCH ASSISTANT**
Minimum Education – Bachelor’s degree
Minimum Experience – None

**Function Responsibilities** – The purpose of this entry-level professional position is to provide
general research support to projects. Such support can include literature reviews and statistical
analysis of primary and secondary data.

**Requirements Substitution:**
Minimum Education – High school diploma
Minimum Experience – 1 year

**SENIOR STATISTICAL SCIENTIST**
Minimum Education – Doctorate
Minimum Experience – 10

**Function Responsibilities** – This position has several major responsibilities, including to design
and select samples for large-scale NORC projects and to serve as sampling statistician, analysis task
leader, and/or internal consultant on survey design projects as assigned. Project responsibilities may
include project direction, task management, consultation on design, methodology, sampling, or
analysis, or a role as principal investigator. This position has project supervisory responsibilities.

**Requirements Substitution:**
Minimum Education – Master’s degree
Minimum Experience – 12 years
**SENIOR SURVEY METHODOLOGIST**

Minimum Education – Master’s degree  
Minimum Experience – 5 years

Function Responsibilities – The purpose of this position is to provide technical advice and methodological consultation to task leaders and project directors regarding survey design, questionnaire design, and data analysis. Project responsibilities may include task management, extensive and long-term consultation, project direction, or a role as principal investigator. This position has project and administrative supervisory responsibilities.

Requirements Substitution:  
Minimum Education – Bachelor’s degree  
Minimum Experience – 7 years

**STATISTICIAN**

Minimum Education – Master’s degree  
Minimum Experience – 1 year

Function Responsibilities – The purpose of this position is to select samples; to carry out weighting and variance estimation; and to provide technical assistance on sample selection, statistical weighting and estimation of variances, and basic survey design. This position often has supervisory and budgetary responsibility.

Requirements Substitution:  
Minimum Education – Bachelor’s degree  
Minimum Experience – 3 years

**SURVEY METHODOLOGIST**

Minimum Education – Master’s Degree  
Minimum Experience – 3 years

Function Responsibilities – The purpose of this position is to provide technical advice and methodological consultation to task leaders and project directors regarding survey design, questionnaire design, and data analysis. Project responsibilities may include task management and consultation.

Requirements Substitution:  
Minimum Education – Bachelor’s degree  
Minimum Experience – 4 years

**SENIOR PROJECT MANAGER-COMPUTING**

Minimum Education – Bachelor’s degree  
Minimum Experience – 8 years

Function Responsibilities – The Senior Project Manager manages planning, implementation, coordination, and monitoring of the information components for large and complex projects. Responsibilities include technical design; resource planning and management; development of the IT project schedule; risk identification and mitigation planning and control; coordinating change
control across the entire survey in terms of scope, schedule, cost and quality; tracking progress and monitoring all creative, business and technical development activities to ascertain and control progress; leading the effort in creative approaches to problem solving and quality data deliveries supporting project needs; conferring with project personnel to provide technical advice and resolve problems.

**Requirements Substitution:**
Minimum Education – High School
Minimum Experience – 10 years

**SENIOR SOFTWARE ENGINEER**
Minimum Education – Bachelor’s degree
Minimum Experience – 5 years

**Function Responsibilities** – The Senior Software Engineer has broad responsibility for designing and implementing highly complex computer based information systems (“IS.”) These systems may be project specific custom development or corporate-wide systems development. The Senior Software Engineer develops specifications for computer systems and is responsible for both general and detail design on any size project. S/he also performs the most complex programming tasks in an application or system. In a team situation, s/he will have a leadership role and usually the responsibility for coaching and reviewing the work of less experienced software engineers. The Senior Software Engineer will work closely with IS managers to develop requirements, designs, and schedules. S/he works under very limited supervision. Senior Software Engineers are expected to take an active role in recommending improved software development policies and procedures. The Senior Software Engineer participates in all phases of the software development life cycle, with emphasis on requirements specification, analysis, and design.

**Requirements Substitution:**
Minimum Education – High School
Minimum Experience – 7 years

**DATABASE ANALYST**
Minimum Education – Bachelor’s degree
Minimum Experience – 5 years

**Function Responsibilities** – The Database analyst plans, designs, and implements databases to support data collection and analysis activities. The analyst works with project staff to determine the requirements to develop and maintain integrated databases. Identifies and resolves production and/or applications development problems related to the use of the database management system.

**Requirements Substitution:**
None

**PROJECT MANAGEMENT-COMPUTING**
Minimum Education – Master’s degree
Minimum Experience – 5 years
**Function Responsibilities** – This position is responsible for the planning, implementation, coordination, and monitoring of the systems for very large and complex NORC projects. S/he manages a team of programmers whose responsibilities may include setting up managements systems, data entry systems, interviewing and scheduling systems, sampling, and delivering interim and final products. Serving as a task leader on multiple survey projects or as an associate project director on a very large project, this individual works with the Project Director and other task leaders to produce system and data products to the client specifications. The position has both management and supervisory responsibilities.

**Requirements Substitution:**
**Minimum Education** – Bachelor’s degree  
**Minimum Experience** – 7 years

**SENIOR PROGRAMMER ANALYST**
**Minimum Education** – Bachelor’s degree  
**Minimum Experience** – 5 years

**Function Responsibilities** – The Senior Programmer Analyst has broad responsibility for planning, designing, and implementing highly complex computer based information systems. These systems may be project specific data processing plans or corporate-wide systems. The Senior Programmer Analyst develops specifications for computer systems and is responsible for both general and detail design on any size project. S/he also performs the most complex programming tasks in an application or system. In a team situation, s/he will have a leadership role and usually the responsibility for reviewing and directing the work of lower level programmers.

**Requirements Substitution:**
**Minimum Education** – High School diploma  
**Minimum Experience** – 7 years

**SENIOR BUSINESS ANALYST**
**Minimum Education** – Bachelor’s degree  
**Minimum Experience** – 5 years

**Function Responsibilities** – The Senior Business Analyst will lead requirements building and quality assurance tasks on projects. Responsibilities also include documenting requirements; functional and systems/integration testing on large scale and/or technically complex projects; develop and conduct end-user training sessions; work with IT and the internal clients to coordinate the deployment/launch of systems for testing, pre-tests and production; lead the research and resolution of production support issues; review and provide coaching on requirements documents, test plans and scripts, and other project deliverables generated by Business Analysts and serve as liaison between non-technical and technical staff.

**Requirements Substitution:**
**None**

**TECHNICAL QUESTIONNAIRE ANALYST**
**Minimum Education** – Bachelor’s degree
Minimum Experience – 1 year

Function Responsibilities – The Technical Questionnaire Analyst (TQA) assists in the technical design and implementation of NORC questionnaires for automated data capture. The TQA will have expertise in NORC’s questionnaire design processes and automated tools, including CATI and CAPI authoring tools, related utilities for data analysis and data export. The person will assist in reviews and walk-throughs for questionnaires on survey projects or proposals, and lead implementation on automated questionnaires.

The TQA will be proficient in the use of questionnaire software and related programming tools. The person will also participate in development, testing, and support of questionnaire development software.

Requirements Substitution:
None

PROGRAMMER
Minimum Education – Bachelor’s degree
Minimum Experience – 1 year

Function Responsibilities – This position is responsible for providing programming support for various parts of the organization. S/he will develop programs and set up and support applications in existing systems.

Requirements Substitution:
Minimum Education – High School diploma
Minimum Experience – 2 years

CAPI FIELD SUPPORT TECHNOLOGIES SUPPORT SPECIALIST I
Minimum Education – High School
Minimum Experience – None

Function Responsibilities – This is a helpdesk position that supports computer users in our central office and in the field.

Requirements Substitution:
None

PRODUCTION CENTER MANAGEMENT II
Minimum Education – Bachelor’s
Minimum Experience – 5 years

Function Responsibilities – The Production Center Manager II has multiple responsibilities – 1) To coordinate and manage all Telephone Center data collection staff and activities; 2) to determine and allocate resources to effectively complete projects’ data collection activities; 3) to develop standard operating procedures for tasks supervised; 4) to provide input in to telephone data collection decisions during proposal writing and early stages of project planning. This position works
closely with all project management staff to maintain schedule of project activities involving telephone data collection tasks.

Requirements Substitution:
Minimum Education – High School
Minimum Experience – 7 years

REGIONAL MANAGER
Minimum Education – Bachelor’s degree
Minimum Experience – 3 years

Function Responsibilities – The Field Operations Center (FOC) will have multiple Regional Manager (RM) positions. Each RM will be responsible administratively for a specific geographically defined region of the country. Administrative responsibilities include: coordination of field staffing within one of multiple geographically defined regions; mentoring, support, and administrative supervision of field managers and field interviewers within (or assigned to) that region; liaison with internal NORC departments and/or committees (as assigned); collecting and analyzing outcome data from recruiting and staffing efforts, incentive/bonus plans, and from other initiatives.

Requirements Substitution:
Minimum Education – High school diploma
Minimum Experience – 5 years

PRODUCTION CENTER MANAGEMENT
Minimum Education – Bachelor’s degree
Minimum Experience – 2 years

Function Responsibilities – This position has multiple responsibilities – 1) to coordinate and manage Telephone Center data collection staff and activities, including interviewing, retrieval locating, prompting, screening, and refusal conversion; 2) to determine and allocate resources to effectively complete projects’ data collection activities; 3) to develop standard operating procedures for tasks supervised, 4) to provide input into telephone data collection decisions during project planning.

Requirements Substitution:
Minimum Education: High School
Minimum Experience: 3 years

ASSISTANT PRODUCTION MANAGER
Minimum Education – Bachelor’s degree
Minimum Experience – 2 years

Function Responsibilities – The Assistant Production Manager is responsible for overseeing the day-to-day activities of interviewers, clerks, and, indirectly, supervisors, and for supervising more complex components of a specific study or studies, including maintaining and improving quality standards and service levels; identifying problems and proposing solutions; performing routine project and production tasks; and ensuring compliance with project and organizational policies and procedures.
**Requirements Substitution:**
**Minimum Education** – High School
**Minimum Experience** – 3 years

**FIELD MANAGER**
**Minimum Education** – High school diploma or GED
**Minimum Experience** – 3 years

**Function Responsibilities** – The Field Manager is responsible for the management of a team of Field Interviewers on a project. The management tasks include: supervision of Field Interviewers; management of a sample of cases in terms of production disposition, costs, and projections; regular reporting of cost and production data (ranging from daily to weekly reporting) to project managers; managing respondent fee monies; and adjusting strategies as needed throughout the field period; conducting ongoing performance appraisals of FI’s, including end of project evaluation; and performing project close down activities.

**Requirements Substitution:**
None

**PRODUCTION CENTER SUPERVISOR II**
**Minimum Education** – Bachelor’s degree
**Minimum Experience** – 2 years

**Function Responsibilities** – The Supervisor II is responsible for overseeing the work of Telephone Interviewers. Supervisors will be handling daily production activities including identifying, troubleshooting, and solving production problems; generating required reports; monitoring, encouraging and motivating interviewers; and handling administrative issues such as attendance, schedule changes, and performance problems.

**Requirements Substitution:**
**Minimum Education** – High School
**Minimum Experience** – 3 years

**FIELD SUPERVISOR**
**Minimum Education** – High school diploma or equivalent
**Minimum Experience** – 1 year

**Function Responsibilities** – This is a project-specific assignment (and therefore temporary) and, with satisfactory performance in the project assignments and interest in increasing field management responsibilities, serves as an entry-level field management positions. The purpose of this position is to provide direct supervision of field interviewers and weekly cost and production data to project managers...

**Requirements Substitution:**
None
PRODUCTION CENTER SUPERVISOR I

Minimum Education – Bachelor’s degree
Minimum Experience – 1 year

Function Responsibilities – The Supervisor I is responsible for overseeing the work of Telephone Interviewers. Supervisors will be handling daily production activities including identifying, troubleshooting, and solving production problems; generating required reports; monitoring, encouraging and motivating interviewers; and handling administrative issues such as attendance, schedule changes, and performance problems. Other responsibilities include evaluating staffing needs, executing start-up and close-down procedures for production systems and building security, and tracking production completes against project budget.

Requirements Substitution:
Minimum Education – High School
Minimum Experience – 2 years

TELEPHONE INTERVIEWER

Minimum Education – High school diploma or equivalent
Minimum Experience – 0 years

Function Responsibilities – This position extends across all telephone activities depending on work flow and specific assignments. These activities include, but are not limited to: pretesting, screening, prompting, interviewing and locating. The interviewer will be required to take direction and follow instructions accurately. The interviewer must demonstrate an excellent telephone etiquette at all times, use good grammar, enunciate words, read text smoothly and have the ability to pronounce difficult (i.e. medical) terms. The interviewer may need to have a thorough knowledge of more than one study and the accompanying instrument. Familiarity with a keyboard is required. This position reports to a Supervisor.

Requirements Substitution:
Minimum Education – High school coursework
Minimum Experience – 0 years

PRODUCTION CLERK

Minimum Education – High School
Minimum Experience – 0 years

Function Responsibilities – This position extends across all Data Preparation and Mail-out Center activities depending on work flow and assignments. These activities include, but are not limited to: mailings, receipt control, editing, scanning, data entry, coding, library tasks and abstraction. The clerk will be required to take direction and follow instructions accurately. The clerk will need to have thorough knowledge of more than one project in the facility and the related instruments and activities. Familiarity with a computer and keyboard is required.

Requirements Substitution:
Minimum Education – High school coursework
Minimum Experience – 1 year
**FIELD INTERVIEWER**

**Minimum Education** – High school diploma  
**Minimum Experience** – 0 years

**Function Responsibilities** – This position extends across all field activities depending on work flow and specific assignments. These activities include, but are not limited to: pretesting, screening, prompting, interviewing, refusal conversion, retrieval, locating and validation. The incumbent will be required to take direction and follow instructions accurately. The person in this position must demonstrate excellent verbal skills at all times; the interviewer must use good grammar, enunciate their words, read text smoothly, and have the ability to pronounce difficult (i.e. medical) terms. The incumbent may need to have a thorough knowledge of more than one study in the field and their instruments at the same time. Familiarity with a keyboard is desired.

**Requirements Substitution:**  
**Minimum Education** – High school coursework  
**Minimum Experience** – 1 year

**SENIOR FINANCIAL MANAGEMENT**

**Minimum Education** – Master’s Degree  
**Minimum Experience** – 3 Years

**Function Responsibilities.** The person in this position has primary responsibility for performing in-depth financial analysis of revenue, expenses, and other financial and operating metrics that impact NORC project activities. The SFM identifies measures for financial process performance, sets objectives for continuous improvement, and develops strategies to meet those targets. The SFM coordinates with project directors in preparation of the forecast and long-term projections for project cost-to-complete. The SFM develops trainings for project staff members on financial matters.

**Requirements Substitution:**  
**Minimum Education** – Bachelor’s Degree  
**Minimum Experience** – 5 Years

**FINANCIAL MANAGEMENT**

**Minimum Education** – Bachelor’s degree  
**Minimum Experience** – None

**Function Responsibilities** – This position is responsible for monitoring costs on moderately large to large projects or providing support to a Senior Financial Analyst on very large and/or complex projects. This position may include some supervisory responsibility.

**Requirements Substitution:**  
**Minimum Education** – High school diploma.  
**Minimum Experience** – 2 years

**ADMINISTRATIVE ASSISTANT**

**Minimum Education** – High School diploma  
**Minimum Experience** – 1 year
Function Responsibilities – Provides clerical and administrative support to project supervisors and managers.

Requirements Substitution:
Minimum Education – High school coursework
Minimum Experience – 2 years

PUBLIC SERVICE LIBRARIAN
Minimum Education – Master’s degree
Minimum Experience – 3 years

Function Responsibilities – The Public Service Librarian provides information management support to social science research projects. This includes designing often complex strategies for, completing, and, as required, gathering requested materials identified in preliminary or comprehensive literature searches of all relevant electronic (e.g., bibliographic and full text databases) and printed resources available to NORC staff through its own library and the University of Chicago Library, as well as searches of Web-based information sources. Additional project support services include the following: formatted bibliographies, cited reference searches, citation verification, delivery of library materials, and bibliographic advice and training for staff.

Requirements Substitution:
Minimum Education – Bachelor’s degree
Minimum Experience – 5 years

Labor Rates
NORC’s labor rates provide good value for the client seeking highly skilled, carefully trained research professionals.

<table>
<thead>
<tr>
<th>SIN 874-1 (Consulting Services)1</th>
<th>Year 17 10/15/2017 – 10/14/2018</th>
<th>Year 18 10/15/2018 – 10/14/2019</th>
<th>Year 19 10/15/2019 – 10/14/2020</th>
<th>Year 20 10/15/2020 – 10/14/2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EXECUTIVE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior Officer</td>
<td>$484.91</td>
<td>$504.31</td>
<td>$524.48</td>
<td>$545.46</td>
</tr>
<tr>
<td>Officer/Director</td>
<td>$361.43</td>
<td>$375.89</td>
<td>$390.92</td>
<td>$406.56</td>
</tr>
<tr>
<td><strong>RESEARCHERS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Principal Researcher</td>
<td>$331.28</td>
<td>$344.53</td>
<td>$358.31</td>
<td>$372.64</td>
</tr>
<tr>
<td>Senior Survey Director II</td>
<td>$232.69</td>
<td>$242.00</td>
<td>$251.68</td>
<td>$261.74</td>
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<tr>
<td>Senior Research Scientist</td>
<td>$205.66</td>
<td>$213.89</td>
<td>$222.44</td>
<td>$231.34</td>
</tr>
<tr>
<td>Senior Survey Director I</td>
<td>$170.58</td>
<td>$177.40</td>
<td>$184.50</td>
<td>$191.88</td>
</tr>
<tr>
<td>Research Scientist</td>
<td>$147.47</td>
<td>$153.37</td>
<td>$159.50</td>
<td>$165.88</td>
</tr>
<tr>
<td>Survey Director</td>
<td>$112.54</td>
<td>$117.04</td>
<td>$121.72</td>
<td>$126.59</td>
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<tr>
<td>Research Analyst II</td>
<td>$105.92</td>
<td>$110.16</td>
<td>$114.56</td>
<td>$119.15</td>
</tr>
<tr>
<td>Research Analyst</td>
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<td>$81.84</td>
<td>$85.11</td>
<td>$88.52</td>
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<tr>
<td>Survey Specialist</td>
<td>$77.22</td>
<td>$80.31</td>
<td>$83.52</td>
<td>$86.86</td>
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<tr>
<td>Graduate Research Assistant</td>
<td>$37.69</td>
<td>$39.20</td>
<td>$40.77</td>
<td>$42.40</td>
</tr>
</tbody>
</table>

1 This includes the labor categories originally associated with SIN 874-3, survey services, which has been subsumed by SIN 874-1.
The Service Contract Act (SCA) is applicable to this contract and it includes SCA applicable labor categories. The prices for the cited SCA labor categories are based on the U.S. Department of Labor Wage Determination Number(s) identified in the SCA matrix. The prices awarded are in line with the geographic scope of the contract (i.e. nationwide.)

SCA Matrix

<table>
<thead>
<tr>
<th>SCA Eligible Labor Category</th>
<th>SCA Equivalent Code</th>
<th>WD Number</th>
<th>Locality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Assistant</td>
<td>01020- Admin. Asst.</td>
<td>2015-5017</td>
<td>Illinois</td>
</tr>
<tr>
<td>Graduate Research Assistant</td>
<td>01112 -General Clerk II</td>
<td>2015-5017</td>
<td>Illinois</td>
</tr>
<tr>
<td>Research Assistant</td>
<td>01111- General Clerk I</td>
<td>2015-5017</td>
<td>Illinois</td>
</tr>
<tr>
<td>Field Interviewer</td>
<td>01420 -Survey Worker</td>
<td>2015-5017</td>
<td>Illinois</td>
</tr>
<tr>
<td>Telephone Interviewer</td>
<td>01420 -Survey Worker</td>
<td>2015-5017</td>
<td>Illinois</td>
</tr>
<tr>
<td>Production Clerk</td>
<td>01111 -General Clerk</td>
<td>2015-5017</td>
<td>Illinois</td>
</tr>
</tbody>
</table>

Non-Labor Items or Other Direct Charges

This contract includes labor prices only. Non-labor items or other direct costs (ODCs) necessary to complete services will be included in proposals and will be priced at actual costs, plus appropriate
burden in accordance with NORC’s current negotiated indirect rate agreement (NICRA) approved by the U.S. Department of Health and Human Services. Miscellaneous non-labor survey and consulting expenses appropriate for projects conducted under SIN-874-1 vary depending on the needs of the project. Such non-labor items typically include: courier service, postage and mailing service costs, printing, telephone costs, respondent fees, computer equipment and network charges, and travel.