



Harvard University
Program on Survey Research

Hiring and Managing Contractors: Survey Research Design Practicum

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What a Sub-Contractor Can Do

- Add expertise
- Provide labor
- Provide infrastructure
- Manage your Work
- Make your life Easier

What a Sub-Contractor Can't Do

- Develop your theories
- Guarantee results
- Perform miracles
- Work for free

Types of Contractors

- Full Service
- Field
- Consultants
- Specialized Services

Places to Find Subcontractors

- Large Survey Research Companies
- Large Non-profit/NGO/Academic Research Organizations and Institutes
- Universities
- Boutique Specialty Companies

Where to Find Survey Specialists

- [MRA Bluebook](http://www.bluebook.org/) (http://www.bluebook.org/)
- [AAPOR Blue Book](http://www.aapor.org/find) (http://www.aapor.org/find)
- [CASRO Members](http://www.casro.org) (http://www.casro.org)
- [WAPOR Members](http://www.unl.edu/WAPOR/blue_book.html) (http://www.unl.edu/WAPOR/blue_book.html)
- [ESOMAR Directory](http://directory.esomar.org/) (http://directory.esomar.org/)
- [LANSRO](http://www.srl.uic.edu/lansro.htm) (List of academic centers: http://www.srl.uic.edu/lansro.htm)

Considerations

- Specialization in Survey Research
- Experience with ***Your Type*** of Project
- Reputation
- Responsiveness
- Budget

Good Signs

- Recommendations from Colleagues
- Offers References
- Several Years Experience
- Member of National Associations
- Experienced Staff
- Invites You to Visit and Monitor

More Good Signs

- Explains How They Understand Your Project
- Asks Questions
- Gives Critical Feedback
- Suggests Alternatives if Appropriate
- Develops a Custom Budget
- Uses Appropriate Terms Like AAPOR RR4 Instead of Completion Rate

Bad Signs

- Uses terms like marketing, telemarketing, direct mail, instead of survey terms
- Conducts other business not related to research
- Client lists are “proprietary”
- Staff have backgrounds in sales or marketing rather than research

More Bad Signs

- Uses “proprietary” methods
- Agrees to anything you say
- Pressures you to make a decision quickly
- Offers a guaranteed lowest price

Types of Contracts

- Cost plus Fixed Fee
 - Based on actual work
 - Direct Costs + Indirect Costs
- Variable Effort Price
 - Different fees for different deliverables
- Fixed Price
 - Fixed price for fixed work
- Task Order
 - Multi-year blanket contract
 - Specific projects negotiated as needed

Typical Process

- Researcher drafts scope of work (SOW) and issues a request for a proposal (RFP)
- Research organization or organizations respond with questions about details, if appropriate
- Research organizations respond with cost proposal
- Contractor selected
- Final contract negotiated

Final Contract Negotiation

- Typically handled by contract specialists or counsel
- Specifics may include:
 - Warranties, indemnifications, protection of intellectual property
 - Financial evaluation of vendor (to make sure they won't go out of business during the contract)
- Payment terms
 - Typical terms for survey projects:
 - 50% due at start of project; 50% due after final deliverables
 - One-third at start; one-third upon completion of field; one-third after project is complete
 - Monthly itemized billings

Other Administrative Considerations

- Check with appropriate Committee on Human Subjects or Institutional Review Board for guidance on protocols or procedures
- Always check with FAS Research Administration Office your grant administrator, or other appropriate offices for specific contracting requirements
- Always insure that contractors can provide appropriate human subjects protection
- Always insure that contractors can provide appropriate information and data security