

Working with Contractors for Formative Research

Each organization has specific rules and regulations for formally working with outside entities and nothing in this document should supersede those rules and regulations. This document is meant to serve as a general guide and provides tips for avoiding frustration when working with contractors for formative research.

Hiring a Contractor

There are minimal contract requirements that you should look for when hiring someone to conduct part or all of your formative research. The following points come from the *Obesity Prevention Coordinators' Social Marketing Guidebook*:

- Describe the research objectives
- Describe the sources, sites, instruments and methods
- Specify the number of groups, interviews, or surveys
- Clarify roles and responsibilities
- Agree to a timeline for activities and deliverables
- Specify format and deliverables
- Specify payment schedules

You may need to be very specific about what you want from formative research, but you also may want to work your scope of work broadly to allow for flexibility in research methods. Once you hire a contractor, you can then negotiate the best method for answering your research questions with their experience and guidance.

The scope of work should establish regular communication expectations (i.e., weekly calls, monthly written progress reports) and indicate your level of involvement. If you want to have final approval over the products to be developed, indicate this as well. Put as much in writing as you can. Indicate your anticipated level of involvement and that of your staff and any of your partners.

Once you receive proposals or bids, you probably have very specific requirements for choosing a contractor from your own organization. In addition to any requirements from your organization, you may want to consider the following skills and abilities when choosing a contractor (or include them as criteria in your request for proposals):

- Past experience conducting qualitative and/or quantitative research
- Level of expertise in conducting market research
- Background in public health
- Ability to reach audience
- Estimated cost

Additional criteria come from the *Obesity Prevention Coordinators' Social Marketing Guidebook*:

- Experience with social marketing, the target audience, the target behavior, content area, and mixed methods
- Target audience will feel comfortable interacting with them
- Variety of qualitative and quantitative skills
- Deal professionally with conflict
- Ability to meet deadlines

If you get a chance to interact with potential contractors you could try to probe to see what their views are on your particular topic. In general, it's best to award the contract to someone without set opinions and who is open to different possibilities.

Working with the Contractor on Your Project

Once you have hired someone to carry out some or all of your formative research, you should continue to take an active role in the process. Make sure that you set up a meeting with the

contractor, in person if possible, or over the phone if an in-person meeting isn't feasible. Make it clear to them that you still want to take a very active role. You are the client in these types of situations and therefore should be able to ask for what you want within the scope and cost of the contract.

In the beginning it is a good idea to clarify expectations for the project. You should have a detailed list of your research objectives and inform the contractor what the purpose of your formative research is and specifically what you would like to have once it is complete. You may want to put all of the deliverables in writing: what type of products the contractor is responsible for developing, timelines, contents of reports that you expect them to write, and so forth.

If you have hired a contractor to develop instruments for formative research (i.e., questionnaires, interview questions, moderator's guides), give yourself and them plenty of time for this process. You will want to have time to review their first draft, make comments, and also send the drafts to any partners or stakeholders who will need to provide input.

If you have hired a contractor to recruit participants for formative research, indicate how you anticipate this will take place. You may want to work with the contractor to develop a screening questionnaire to find participants who are part of your target audience or audience segment.

If you have hired a contractor to conduct qualitative research (i.e., in-depth interviews, focus groups), here are some criteria from the *Obesity Prevention Coordinators' Social Marketing Guidebook* for interviewers and moderators:

- Study participants will feel comfortable talking to them
- Can listen with interest
- Can be nonjudgmental
- Put participants' comfort first
- Respond to nonverbal cues
- Talk only as necessary
- Handle distractions well