

Evaluating Research Proposals

Comparing proposals “apples-to-apples” is crucial to establishing which one will best meet your needs. Consider these ideas to help you focus on the details that contribute to a successful survey.

Make sure the proposal responds to your objectives.

The proposal process begins well before you ask any research firm for quote. The process really begins with the discussions you and your team have about objectives. What are your goals? What are the decisions you want to make when the project is done and you have data in hand?

Once you have a solid vision of the survey, then it's time to start talking with potential partners. Throughout your conversations, take note: Do the various firms ask you specific questions about your objectives, the group of people you'd like to survey, and your ultimate goals? Do they, indeed, ask about decisions that you wish to make? Details regarding your specific need should always be front and center during the conversations.

Sampling plan.

When reviewing the sampling plan, make sure the proposal mentions sample size, response rate estimates, number of responses, and maximum sampling error. If you're unsure of the impact these figures have on the quality of your results, ask the researcher. They should be able to explain them in terms you can understand.

Questionnaire.

The quantity and types of information sought from respondents will impact cost. Quantity encompasses the number of questions and number of variables to process. Type refers to how the questions will be processed, the data entry involved and whether all or just some data will be cleaned.

No evaluation is complete until you know the approximate number and types of questions planned for the survey. The number of open-ended questions should be included as well because open-ended questions that capture verbatim responses can impact the response rate and possibly the price of your survey, especially if done by mail.

In addition, make sure the proposal clearly indicates who will develop the questionnaire content. Also, determine if it includes enough collaboration time to be sufficiently customized to meet your particular needs.

Data collection approach.

For online surveys paying attention to the data collection series and who is responsible for sending survey invitations. Multiple emails to sample members can encourage response. As well, the invitation process should be sensitive to data privacy issues such as those indicated by GDPR and others. Proposals for mailed surveys should clearly outline the data collection series and each component of the survey kit.

Data processing.

Any proposal you receive should highlight the steps the research company will take to make sure that the data is accurate and representative. Depending on the type of survey, checking logic, consistency, and outliers can take a significant amount of time. You must have some process noted to identify inconsistent answers for surveys that collect a significant amount of numerical data (salary survey, market studies, budget planning). Finally, some percentage of mailed surveys need to be verified for data entry accuracy.

Analysis.

A straightforward analysis of survey data can meet many objectives. In other cases, a multivariate statistical analysis will provide deeper insights to achieve your objectives— making results easier to use. If your objectives include learning about separate segments of your circulation, crosstabulations should be specified.

Deliverables.

A variety of reporting options exist for a survey. These include but are not limited to data tables, a summary of the results, in-depth analysis, and graphed presentations. As a result, you need to understand exactly what you'll receive following your survey and in what format.

No surprises!

Make sure the proposal covers all the bases: what you need to do and provide, what the firm will do when they will do it and how much it will cost. There should be no surprises in what you need to supply. No “you need how much letterhead and envelopes?” a week before your survey is scheduled to mail. Review the price carefully and understand what it includes and doesn't include. As with many things in life, you usually get what you pay for.