

Online Resource 7. Protocol for hiring a survey firm

A survey firm is an entity that can be contracted to conduct the data collection. The firm will likely be composed of the same individuals and with the same structure as if the data collection was done internally, but will be managed by someone from the firm.

While hiring a survey firm is normally more expensive than doing the data collection internally, it means the data can be collected faster and with less work from the program office. It also ensures that there is a qualified team doing the data collection whereas program staff is usually trained for such tasks.

However, hiring a survey firm still requires oversight and direction from the evaluation team. The following steps are often necessary when hiring a firm.

Step 1: Develop a Terms of Reference (TOR) for the data collection. Several sample TORs are listed in [online resource 10](#). The appropriate information should be filled out by the program manager in consultation with the lead evaluator. The more specific this document is, the easier it will be for the survey firm to understand their roles and requirements, and the easier it will be to select the appropriate firm.

Step 2: Publicize the TORs. Qualified firms can be found most often through local universities, local census bureaus and local and international research companies. It is important to find a number of potential firms to hire so that selection can be done over a group of them. It is advisable to post an official call for proposals on appropriate websites, advertise in the newspaper, and contact universities and census bureaus directly.

Step 3: Select the best firm. Among all the proposals received, one can then short-list the most qualified ones and conduct interviews with a limited number of firms. The main criteria when considering the quality of proposals are:

- Adequacy of proposed methodology and work plan in responding to TOR
- Qualifications and competence of the key staff related to the assignment
- The firm's experience
- Suitability of training plan
- Proposed budget/cost

The weights of the different criteria can be adjusted to fit the program needs. A final score is then computed and compared across proposals.

Step 4: Sign a contract. Once a firm has been chosen, a contract will need to be signed with the firm. If any problems arise in the future, the contract is the first legal base in which to resolve any issues. This document should explicitly spell out the expectations and requirements of the data collection.

Hempel, Kevin and Nathan Fiala. 2011. *Measuring Success of Youth Livelihood Interventions: A Practical Guide to Monitoring and Evaluation*. Washington DC: Global Partnership for Youth Employment.

Finally, it is important that auditing and oversight be conducted by the M&E office over the data collection, even if it is collected by an outside firm. Most survey firms are for profit, and so high quality data collection is not always their first priority. It is important to ensure that data is being collected by the enumerators properly, that the firm is completing the work in a timely manner, and that any cost overruns, if there are any, are correctly attributed to either the program or the survey firm.