

Getting Help Answering Your Policy Questions: How to Plan for Research Procurement

September 13, 2022

Webinar Series on

Building Your Data and Research Skills to Answer Policy Questions

Housekeeping

- The webinar is being recorded.
- The recording, slides, and transcript will be posted online.
 - Links will be emailed to participants when the materials are ready.
- We have enabled closed captioning.
 - Hide captions or adjust settings with the **Live Transcript** button at the bottom of your screen.

Hearing from You

- We encourage your **questions** or **comments** in the chat box **at any time**.
- We have scheduled two times for your questions and reflections.
- You are muted now; raise hand during these Q&A times to be unmuted.
- To start off, we ask you to tell us in the chat:
 - Why are you attending this webinar?
 - What do you hope to learn?

Child Care Research and Evaluation Capacity Building Center

Supported through the Office of Planning, Research, and Evaluation (OPRE) in the Administration for Children and Families (ACF) and managed through a contract with the Urban Institute, in partnership with Mathematica

Alysia Blandon, OPRE project officer

Julia Isaacs, project director; Teresa Derrick-Mills, coprincipal investigator

Goal: Support CCDF Lead Agencies in building research and evaluation capacity

Activities:

- [Building Child Care Research Capacity](#) through web events and written materials



Speakers



Julia Isaacs, senior fellow at the Urban Institute, and director of the Child Care Research and Evaluation Capacity Building Center



Teresa Derrick-Mills, principal research associate at the Urban Institute, and coprincipal investigator of the Child Care Research and Evaluation Capacity Building Center



Jocelyn Bowne, deputy commissioner for research, innovation, and programs, Massachusetts Department of Early Care and Education



Ariel Ford, CCDF lead administrator and director of the Division of Child Development and Early Education, North Carolina Department of Health and Human Services

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Hearing from You

- A sampling of responses from the chat:
 - Why are you attending this webinar?
 - What do you hope to learn?

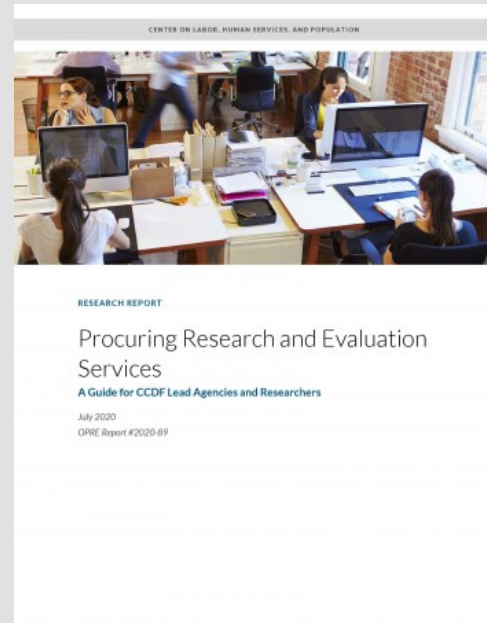
Format of Today's Session

- Teresa Derrick-Mills will share tips, lessons learned, and resources on research procurement.
- Ariel Ford and Jocelyn Bowne will add remarks based on their experiences as state CCDF Lead Agency staff.
- Opportunity for YOU to ask questions and share your perspectives.

Planning for Procuring Research and Evaluation Services: An Overview

Procurement Guide for CCDF Lead Agencies

1. Understand procurement terms
 - In-text definitions and glossary at the end
2. Know where to look for more information
 - Resource tips and links throughout
3. Anticipate steps, timelines, and questions to ask
 - Provide steps and explain in plain language
4. Help you remember through a checklist
 - Checklist at the end of the document



What Is Procurement?

Getting goods and services from other entities rather than making or providing them yourself

Public Procurement

- Determining what is needed and who can best meet the need
 - At the right place, at the right time, for the best price
- Providing a fair and open process for meeting the needs

Key Steps in Procuring Services

- Determine the need
- Learn the requirements
- Write up and advertise what you need
- Review proposals and select who will do the work

Many steps in the process will require your team to work with other state agencies. Give yourself some lead time.

Do You Need to Procure Research Services?

- You can choose to work with external or internal research partners—or both!
- External research partners you secure through procurement can help your agency:
 - Learn more from your existing data.
 - Gather new information to understand needs, gaps, perspectives, and experiences.
 - Evaluate your current efforts and programs.
 - Support continuous learning and accountability, and help plan for the future

How Do You Learn Procurement Requirements in Your Agency?



- Check in with your procurement office
- [National Association of State Procurement Officials](#)

Questions and Reflections

- Insights from our guests
 - Massachusetts and North Carolina
- Your **questions, reflections, or comments**
 - Drop them in the chat.
 - We would love to hear from all, especially CCDF Lead Agency staff.

**Write up and advertise what you need,
and then review proposals and select
who will do the work**

Developing a request for proposal (RFP)



Purpose and goals



Statement of work



Expertise and qualifications



Budget guidance



Timeline

Identifying Data Needs

- a) Do we have the data, or do we need to collect new data?
- b) How do we protect the data and the people?
- c) Who will own the data?
- d) Have we built in enough time for all data steps?

RFP Process

Each government agency is likely to have very specific legal requirements about this part.



Instructions on questions and answers



Format and delivery method



Legal requirements and payment methods



Review criteria and process

Getting Ready for the Review and Selection Process

- a) Meets state criteria
- b) Provides a transparent process
- c) Avoids bias and accounts for specialized knowledge needed
- d) Accounts for staffing, time, and timing needed

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Resources

[Procuring Research and Evaluation Services](#), A Guide for CCDF Lead Agencies and Researchers (Derrick-Mills, Reginal and Isaacs, 2020).

Check out the [OPRE website](#) for slides, audio recordings, and transcripts of webinars (posted a few months after each webinar).

Check out the [Building Child Care Research Capacity](#) web page for slides from past webinars and other resources.

If you have questions, feel free to email me (Teresa Derrick-Mills) at tderrick-mills@urban.org.

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Forthcoming Webinars

Upcoming webinar on equity and inclusion in research planned for late November.