

Guide to Bath SDR QuIP consultancy services

Bath SDR's mission is to facilitate broader use of the QuIP by organisations and consultancies and to protect the protocol's integrity and reputation by upholding the highest standards of use by trained and accredited practitioners. The QuIP trademark is owned by the University of Bath, where the QuIP research originated. Bath SDR operates under a formal licensing agreement with the university, subject to a license fee. The trademark is not designed to prevent people using QuIP, but is there to protect the integrity and standards of the approach, with Bath SDR in the role of helping to maintain the standards through training and support. To this end we offer both consultancy and training services.

We also have a wide range of resources freely available online which we recommend you look at in the first instance:

- Various briefing papers, articles and podcasts at: www.bathcdr.org/resources
- Comprehensive guidelines and case studies from our book, *Attributing Development Impact: The QuIP Casebook*. The chapters are available as a [free download](#) courtesy of funding from the Alumni Fund, University of Bath.

The Bath SDR team offers **advisory and training services** for those who are considering integrating the QuIP into their existing evaluation approach, or who want to carry out some or all of the QuIP study steps in-house. A list of QuIP training courses follows. We recommend organisations allow for at least one **supported QuIP study** from Bath SDR before undertaking training with a view to working on QuIP studies independently as there is a steep learning curve associated with using QuIP data effectively and appropriately for your organisation – much of which can be learned from conducting a study collaboratively and adapting the approach to your needs. Following training and accreditation, Bath SDR can offer different levels of support – dependent on the level of accreditation achieved. A guide to different options and indicative prices follows the training course list.

A **supported study** would initially be based on a consultancy contract, working with an organisation to establish how QuIP can be adapted for your needs. Once commissioners have a clear understanding of how a QuIP could be incorporated into their study a bespoke proposal can be put together including the relevant aspects of questionnaire design, local data collection, coding, analysis and reporting.

Bath SDR's day rate for consultancy/advisory work is £585 + VAT.

Rates for data collection are specific to country and study requirements.

If you would like to outsource a whole QuIP study, Bath SDR offers a **consultancy service** to carry this out from fieldwork to report and/or workshop stage, using trained and accredited field researchers, analysts and, where required, specialist consultants. Prices for these studies are bespoke so please contact us to discuss details.

Bath SDR is a [not for profit company](#), limited by guarantee. We re-invest any annual surpluses in further development and dissemination of the QuIP approach, including subsidised training for small charitable organisations, and continuous investment in development of our qualitative analysis software solutions.

QuIP Training

Those new to the QuIP are encouraged to participate in training before they embark upon a QuIP study. The level of training will depend on the extent to which they intend to be involved in QuIP studies (study design, data collection, analysis).

QuIP Training Courses			
Course name	Description	Duration	Cost
Introduction to QuIP	A bespoke session for organisations or consultants who are thinking about using QuIP in their work. This can take the form of a presentation and discussion within an organisation*, or a series of video calls covering a <i>condensed</i> version of the Lead Evaluator training, requiring more independent reading and work. Participants can be accredited as 'Lead Evaluators' on completion of an assignment following the course.	1 day	£1,000**
QuIP Evaluator Training	A more in-depth introduction to designing a QuIP study, including an overview of analysis techniques. This is a group session run for a minimum of 8 people. We run quarterly training sessions in Bath, but can also arrange for these to be held in at other locations if sufficient numbers are available. Participants are accredited as 'Lead Evaluators' on completion of an assignment following the course.	2 days	£600 per person
QuIP Data Collection Training	A course for researchers undertaking qualitative field research to prepare them for QuIP data collection. Can be delivered over remote video link.	1 day plus a half day review of pilot data	£1,000
QuIP Analyst Accreditation	A remote assignment-based accreditation for those who intend to code and analyse QuIP data. Completion of either the Introduction or Lead Evaluator training is a pre-requisite. Participants will be given a dataset to code, feedback will be provided, as well as a video call to discuss the QuIP dashboard of results.	N/A	£400

**Travel, venue and catering are not included.*

*** This includes accreditation for up to 2 people within an organisation. Any additional persons who wish to submit an accreditation exercise will be chargeable at a rate of £400 per submission.*

All prices exclude VAT where applicable

Post-training Options

These are summarised in a table at the end of this document.

Independent

Commissioners who have undertaken a QuIP training course can undertake a QuIP study independently, using their own data analysis software and in-house resources. Any 1:1 advice or support would be charged at our day rate.

For those who wish to have further support, various packages are suggested below, with indicative costs. If you are preparing a budget for a QuIP study you should remember to include the following costs, whether you involve Bath SDR or not:

- Planning and designing the study. Bath SDR charges for around 2-3 days for this, including advising on sampling strategy and questionnaire design.
- Recruitment and training of a field team. Bath SDR allows for around 3 days training if face-to-face. This includes a day's briefing on the theory of QuIP and practicing and refining the questionnaire to be used, a day of piloting and writing up, and a day of reviewing the pilot data and trying to code some of it.
- Data collection – based on approximately 2 interviews per day per interviewer. You should also add on some days for final write up and quality control.
- Travel to data collection sites and per diems.
- Training of QuIP analysts if analysis is done in-house. Bath SDR's training package detailed above.
- Coding and analysis of all data. Approximate timings for experienced analysts are detailed above.
- Presentation of the data in a standardised QuIP interactive dashboard, and optionally a report to accompany the dashboard.
- Any additional follow-up meetings or workshops if required.

NOTE: Bath SDR's approach to coding and analysis

A common issue with qualitative impact assessment is how to organise and make sense of large quantities of text data, and to do so in a way that is transparent, so that generalisations drawn from it can be peer reviewed. Various software packages are available on the market to assist with the task, and many could be used with the QuIP coding system, with some preparation to set the systems up appropriately. (A short note on QuIP coding is at the end of this document, but for more information please see the [QuIP Guidelines](#).)

At Bath SDR we have invested in our own bespoke [data analysis solution](#) designed to speed up and standardise the coding and analysis process for our reporting purposes. This currently uses a combination of bespoke Excel spreadsheets, data processing with the help of local software company [Ketl](#), and a business intelligence platform called [MicroStrategy](#) which helps to present and query the QuIP coded data in a manageable and transparent way. This is currently not available to use outside of Bath SDR due to the many and complex steps involved in getting it all right as well as the costs of technical support, but the packages below include an option to provide technical support to prepare and process files.

Please note that we are currently working on a standalone software application to code QuIP data, Causal Map see [causalmap.app](#) for more.

Level 1: Support with data collection and coding templates

Evaluators who have QuIP Lead Evaluator and Analyst accreditation can design a QuIP study and undertake data collection and coding independently. If you would just like to use the QuIP dashboard we can just offer the following services:

- Preparation of a bespoke data collection Excel spreadsheet, before data collection takes place, according to a questionnaire schedule provided by the project manager. *NOTE: If the questionnaire design is not considered to meet QuIP standards advice will be offered, charged separately.*
- Processing raw data into data analysis files for use by the commissioner for coding. *NOTE: the data must be checked and cleaned by the project manager, including correct respondent codes, spellcheck and grammatical corrections where necessary.*
- Export of data to a MicroStrategy dashboard.

This service will be charged at a minimum of one day, £585 (plus VAT).

Any additional support or re-importing of changed data would be based on minimum increments of 2 hours (calculate at ¼ of day-rate).

Level 2: Support with data collection

Bath SDR has trained local research teams in around 20 countries, and is committed to using these teams wherever possible, to maximise the use of qualified local researchers and to cut down on unnecessary flights for training or data collection. We offer commissioners the option to design a QuIP study but outsource data collection with a Bath SDR trained field team if there is an appropriate fit. This would be quoted for per project.

Alternatively, speak to us about training your own research team, or accessing materials for you to undertake training with them. We ask that project managers should have completed Lead Evaluator accreditation before doing this since you will be required to lead on project design, training and data collection.

Level 3: Support with coding and analysis

If you want support with data once it has been collected there are two options; only coding, or coding & analysis.

OPTION 1: Coding

Bath SDR analysts will code all the qualitative data according to the QuIP coding system. This option includes the following services:

- Preparation of a bespoke data collection Excel spreadsheet, before data collection takes place, according to a questionnaire schedule provided by the project manager. *NOTE: If the questionnaire design is not considered to meet QuIP standards advice will be offered, charged separately.*
- One pre-coding handover day to understand the scope of the project and all required background documentation. *NOTE: If insufficient project documentation is provided and additional research time is required this will charged separately.*
- Processing raw data into data analysis files. *NOTE: the data must be checked and cleaned by the project manager, including correct respondent codes, spellcheck and grammatical corrections where necessary.*

- Coding by a trained analyst in Excel according to the QuIP 5-step coding system.
- Regular check-ins with project manager to agree on final tags and approach to coding.
- Export of data to a MicroStrategy dashboard for analysis, with guidance notes on use of the dashboard.

OPTION 2: Coding and analysis

As above, plus:

- Preparation of a narrative QuIP summary to accompany the dashboard which presents relevant tables, data visualisations, respondent quotations and a basic narrative which highlights patterns and outliers. *NOTE: this report would be considered to be a document for use by the project manager to add to and incorporate into a final project report, and will therefore not contain information about project design or background, a full executive summary or conclusion - all best prepared by the project manager.*

As a guide to coding and analysis costs, coding for what we term a ‘single’ QuIP study (24 x individual household interviews plus four focus group discussions), would take our trained analysts approximately 8 days. To code, analyse and produce a report for a single QuIP would take approximately 12 days (dependent on quality and length of responses). A ‘double’ QuIP study (48 x individual household interviews plus 8 focus group discussion) would take approximately 15 days to code with an additional approximate 4 days to undertake analysis and reporting. These timings could be longer if you use inexperienced coders. (To find out more about sample sizes, please see the [QuIP Briefing Paper](#) and the [Sample Selection Briefing Note](#).)

Example costs:

Sample size	1. Coding only		2. Analysis and report writing	
	Days	Cost	Days	Cost
24 (+4)	8	£4,680	12	£7,020
48 (+8)	15	£8,775	19	£11,115

These costs are based on estimates of days required; the actual number of days would depend on the quality and length of the data provided.

These options do not include support with questionnaire design, field team management, or re-coding should any data be changed.

Level 4: Support with data collection, coding and analysis

Combination of levels 2 and 3.

Report Assurance

The QuIP methodological guidelines are freely available and anyone can use them to guide their study design. However, in an effort to promote the reputation of QuIP and to offer additional value to those who have invested in training, we will offer a Report Assurance service to review studies undertaken by accredited evaluators. This would be charged at a minimum of one day's consultancy work per study, but may require two days, depending on the length and complexity of the report. The review will include:

- A summary of the strengths and weaknesses of the report in the context of QuIP principles.
- Recommendations on how the report (and the reporting process) might be improved in order to demonstrate a better understanding and application of the QuIP.

The review will not include grammatical or formatting edits, involvement from an independent panel of assessors or a formal feedback consultation. If the report does not meet the standards required for assurance there will be the option to re-submit at additional cost. Reports would usually be reviewed within a week, with a minimum of 4 weeks' notice to enable us to book it in.

Summary of options for partnership with Bath SDR - following training				
Support level	Stage 1: Study and questionnaire design <i>(By commissioner)</i>	Stage 2: Data collection	Stage 3: Coding and data analysis	Stage 4: Report writing and feedback <i>(By commissioner)</i>
Independent	Following training, independent studies using own data analysis software.			
Level 1	Bath SDR formats data collection templates in bespoke QuIP Excel sheets.		Bath SDR creates analysis Excel sheets for coding by commissioner. Bath SDR converts coded data into QuIP dashboard (in MicroStrategy).	<i>Optional: Report Assurance service available for studies undertaken by QuIP-trained evaluators.</i>
Level 2	<i>Optional: Bath SDR formats data collection and coding templates in bespoke QuIP Excel sheets.</i>	Bath SDR manages data collection.	<i>Optional: Bath SDR formats coded data into QuIP MicroStrategy dashboard.</i>	<i>Optional: Report Assurance service available for studies undertaken by QuIP-trained evaluators.</i>
Level 3	Bath SDR formats data collection and coding templates in bespoke QuIP Excel sheets.		Bath SDR manages coding and/or analysis.	
Level 4	Bath SDR formats data collection and coding templates in bespoke QuIP Excel sheets.	Bath SDR manages data collection.	Bath SDR manages coding and/or analysis.	

VAT is chargeable where geographically applicable.