

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
Face to face QuIP Evaluator Training	An 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 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 +VAT
Online QuIP Evaluator Training	As above but run as a blended learning course online for a maximum of 12 people per session. Participants are accredited as 'Lead Evaluators' on completion of an assignment following the course.	8 days (approx. 16 hours)	£500 per person +VAT
QuIP Data Collection Training	Access to online course materials for researchers undertaking qualitative field research to prepare them for QuIP data collection. This is complemented by an online workshop of up to 3 hours with the research team to prepare for the specific project being planned. If you would like pilot transcripts reviewed and feedback provided, this is charged separately.	Online + 3-4 hour workshop	£750 +VAT
QuIP Advanced Coding and Analysis	Access to online course materials for those who intend to code and analyse QuIP data in Causal Map . Prior completion of the Lead Evaluator course is strongly recommended. Free guidance on Causal Map is available here , but these materials will guide you through the key steps to follow when coding & analysing QuIP data and provide advice and resources on how to use the features of Causal Map to best effect. 1:1 sessions can be provided for further support, charged at a minimum of £150 per two hour session. A Causal Map subscription needs to be taken out separately and is not provided by BSDR. A free subscription is sufficient for the course, but you may need a paid subscription for planned work.	Online self-study and optional paid 1:1 sessions	Online materials £100 per login £150 per online support session (up to 2 hours)

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 Causal Map 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, but none are specifically set up to look at causal connections. For this reason, Bath SDR has invested in a standalone software application designed to speed up and standardise the coding and analysis process for QuIP reporting; the Causal Map Application: www.causalmap.app

Causal Map is a separate company but run alongside Bath SDR and designed to work for QuIP studies as well as other social research. Causal Map is the default software for analysing QuIP data, so QuIP users can code and analyse their data independently of Bath SDR. This is guaranteed to be cheaper than the previous minimum charge of one day's Bath SDR work for processing data into a MicroStrategy dashboard.

We still offer a service to process and analyse data using trained QuIP analysts.

Level 1: Support with data collection and coding set up

Evaluators who have QuIP Lead Evaluator and Analyst accreditation can design a QuIP study and undertake data collection and coding independently, using the recommended app Causal Map. Bath SDR can 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 (this may be charged separately if significant).*
- Processing the data into Causal Map, preparing pre-set reporting tables and then handing back for coding by the commissioner for coding.
- Support with preparation of a QuIP report using the analysed data.

This service will be charged at a minimum of two days at £585 plus VAT per day. Any additional support would be based on minimum increments of 2 hours (£150).

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 be charged separately.*
- Processing raw data into the Causal Map application. *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 according to the QuIP coding system.

- Regular check-ins with project manager to agree on approach to coding and final factor labels.
- Handover of Causal Map file 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 Causal Map dashboard with extracted tables, data visualisations, respondent quotations and a basic narrative which highlights patterns and outliers. *NOTE: this report can be prepared in PowerPoint or Word, and 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.

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 Causal Map or other analysis software.			
Level 1	Bath SDR formats data collection templates.		Bath SDR prepares data in Causal Map for coding and assists with final analysis.	<i>Optional: Report Assurance service available for studies undertaken by QuIP-trained evaluators.</i>
Level 2	<i>Optional: Bath SDR formats data collection template.</i>	Bath SDR manages data collection.	<i>Optional: Bath SDR prepares data in Causal Map for coding.</i>	<i>Optional: Report Assurance service available for studies undertaken by QuIP-trained evaluators.</i>
Level 3	Bath SDR formats data collection templates.		Bath SDR manages coding and/or analysis.	
Level 4	Bath SDR formats data collection templates.	Bath SDR manages data collection.	Bath SDR manages coding and/or analysis.	

VAT at 20% is chargeable where geographically applicable. Most countries outside the UK do not need to pay VAT.