



Best Practices in Managing Large-Scale Qualitative Research Projects

Supplemental materials

QDET2

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Table 1. Critical Components of Qualitative Research and Quality Criteria for Each

Component of Qualitative Research	What it Includes	Quality Criteria
Project management	Coordination of all aspects of the project.	Project and task leaders ensure that all team members have a consistent understanding of the research-based reasons for the steps they are implementing (Fernald and Duclos, 2005).
Study design	Identification and refinement of research objectives; decision-making about sampling, recruiting, interviewing, data collection, and analysis approaches.	All decisions about the study design are grounded in or stem from a set of clearly articulated research objectives (Santiago-Delefosse, et al., 2015).
Sampling and recruitment	Strategies for identifying, contacting and inviting desired respondents to participate; development of the screener questions; recruiter training.	Screening criteria, respondent selection, and progress monitoring all serve the purpose of fulfilling the project's research objectives (Marshall and Rossman, 2006).
Data collection	Interview/focus group guide development; interviewer/moderator selection and training; implementation of interview/focus group procedures.	The data collection protocol operationalizes the research objectives in the interview or focus group guide (Roller and Lavrakas, 2015); uses a methodical and consistent approach to gathering the data (Poortman and Schildkamp, 2012) (e.g., through the use of training to ensure consistency across interviewers or moderators, or with the use of staff who are knowledgeable about qualitative research); and provides a research-oriented justification for the mode of data collection (in-person, telephone, online) (Roller and Lavrakas, 2015) and method of recording the data (e.g., audio or video recordings; interviewer notes; notetaker notes; transcripts) (Tong, Sainsbury and Craig, 2007).
Case and data management	Conversion of raw data; tracking completed cases or focus groups; tracking data decisions.	Cases and data are stored systematically to enable accurate reporting of detailed descriptions of data collection and analysis methods called for by most qualitative research quality criteria (Roller and Lavrakas, 2015; Tong, Sainsbury and Craig, 2007; Reynolds, et al., 2011; Bryman, Becker and Sempik, 2008). Data management also protects the confidentiality of research participants (Lin, 2009).
Analysis	Development and implementation of a coding scheme; verifying interpretation of the data.	All data are thoroughly examined and classified (Roller and Lavrakas, 2015); coding schemes are iterative and flexible (Marshall and Rossman, 2006); interpretation of the data is relevant to the research objectives (Santiago-Delefosse, et al., 2015); rigorous verification procedures involving multiple researchers are employed (Poortman and Schildkamp, 2012); the analysis process is made explicit by documenting decisions surrounding each step (Tong, Sainsbury and Craig, 2007).
Report	Detailed description of methods and results.	Qualitative reports are a rich compendium (or "thick description") of the researchers' summary and interpretation of the data, along with relevant and abundant supporting details. A high quality report also presents a clear and complete description of the research methods. (Boeije and Willis, 2013; Tong, Sainsbury and Craig, 2007; Roller and Lavrakas, 2015).

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Table 2. Large-scale Qualitative Research Projects Referenced in Proposed Best Practices

Study ID and Citation	Overview	Large-scale elements
A. Content Test Stapleton and Steiger, 2015	Cognitive testing of 11 topics on the American Community Survey, including race/ethnicity and computers/internet/telephone.	420 interviews 3 rounds 2 languages 11 item topics 48 recruitment targets 43 interview guides 25 interviewers 8 locations 98 analysis codes
B. Burden Test Unpublished	Cognitive testing of ways to reduce the response burden of particular items on the American Community Survey, including year of naturalization and year housing structure was built.	120 interviews 6 item topics 42 recruitment targets 14 interview guides 9 interviewers 2 locations 52 analysis codes
C. School Surveys Unpublished	Cognitive testing of new modules being added to school, principal, and teacher questionnaires on the subjects of teacher and principal evaluation, professional development, engagement, and instructional time.	183 interviews 5 rounds 13 item topics 13 interview guides 12 interviewers 7 locations
D. Victim Survey Martinez, M., Henderson, A., Luck, J., & Davis, M.C., forthcoming	Cognitive testing of screener questions that identify victims of stalking behavior, who are then administered a full survey.	60 interviews 5 rounds 15 item topics
E. Targeted Follow-up Sha, et al., 2012; Sha and Childs, 2014; Peytcheva, et al., 2013	Cognitive testing and ethnographic observations among Census respondents living in a variety of housing situations to assess reasons for suspected duplicate Census responses.	226 cognitive interviews 50 ethnographic interviews 2 rounds 13 interviewers 5 locations
F. AHS Cognitive Testing Sha, et al., 2010	Cognitive interviews in English and Spanish to test translation of American Housing Survey. Participants were selected based on geographic region of origin and had to be monolingual or have limited English proficiency.	128 interviews 2 rounds 2 languages 10 recruitment targets 5 locations
G. HANDOVER Research Collaborative Johnson, et al., 2012	Semi-structured interviews with patients and their care providers, and focus groups with patients, patient representatives, and health care providers to study transitions of patient care.	Multiple analysts across 5 countries 84 analysis codes
H. Clubs and Drugs Study Hunt, Moloney and Fazio, 2011	In-depth interviews and ethnographic observations in nightclub settings to study youth drug use.	300+ interviews 3 locations 3 languages
I. Healthy Brain Study Laditka, et al., 2009	Focus groups to study public health communication for promoting brain health. Participants included adults over age 50, physicians, and caregivers.	69 focus groups 9 locations

Table 3. Best Practices for Managing Large-scale Qualitative Research Projects

Overall project management

- 1 Permeate all aspects of the project with the research objectives.
- 2 Methodically document and communicate research-based decisions.

Study design

- 3 Optimize the study design to ensure sufficient interviews for all competing research objectives.
- 4 Design iterative studies with multiple rounds to increase the quality and certainty of the findings.

Sampling and recruitment

- 5 Develop a sampling and recruitment plan.
- 6 Centralize the selection of respondents.
- 7 Use technology to monitor and adapt recruitment strategies.
- 8 Provide study-specific training to recruiters.

Data Collection: Development of the interview or focus group guide

- 9 Develop multiple interview or focus group guides simultaneously.
- 10 Use formatting to convey information to interviewers and moderators consistently.
- 11 Develop clear procedures for handling interview materials.

Data Collection: Interviewer/moderator training

- 12 Go beyond the interview/focus group guide to cover all aspects of the interview process.
- 13 Keep trainees engaged by facilitating input and making training fun.
- 14 Allow multiple and varied types of practice interviews.

Data Collection: Implementation of data collection procedures

- 15 Identify lines of communication among off-site recruiters, interviewers/moderators, and project leaders.
- 16 Establish strict rules and clear procedures for transmitting data between the home office and the data collection locations.

Case and data management

- 17 Track in detail the progression of transformation from raw to analyzable data.
- 18 Maintain control of the data with consistent ID, folder structure, and file naming conventions.
- 19 Be aware of and fully address all project data security requirements.
- 20 Use software designed for managing qualitative data.

Analysis

- 21 Conduct formal training for summary writers.
- 22 Develop templates that facilitate analysis-ready summaries.
- 23 Develop and implement flexible coding schemes that are applied by trained coders who adjudicate frequently.
- 24 Develop a detailed analysis plan to improve the quality of reporting.

Report

- 25 To ensure consistency among multiple writers, set clear expectations at the beginning.
- 26 Establish a review and verification process.

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