Qualitative Data Collection Checklist

The following checklist will identify the steps to develop, collect, and use qualitative data.

Step 1: Determine the focus of data collection

- [ ] Define the research question(s) based on logic model and needs
- [ ] Determine the type of qualitative data collection (group versus one-on-one)
- [ ] Determine target population (inclusion and exclusion criteria)

Step 2: Prepare for data collection

- [ ] Develop data collection protocol
- [ ] Determine the structure of qualitative questions: informal, unstructured, semi-structured, or structured
- [ ] Determine target number of participants
- [ ] Develop recruitment strategy (including incentives)
- [ ] Pilot test your protocol
- [ ] Identify and train data collection staff: moderator/interviewers, data entry, and data analysts
- [ ] Identify data collection setting and intended length
- [ ] Determine materials needed for data collection (e.g., recorders, data collection templates)
- [ ] Determine recording method (notes, audio, video)

Step 3: Collect qualitative data

- [ ] Recruit participants
- [ ] Collect data according to your local ethical/privacy laws
- [ ] Review data collected, debrief, and resolve/note any questions

Step 4: Conduct data analysis

- [ ] Determine data analysis method: manual or using analysis software (e.g., Atlas.ti, N-Vivo, MAXQDA)
- [ ] Review data and organize in a manageable format (e.g., by date, by question asked, by participant characteristics)
- [ ] Determine coding and analysis strategy (e.g., open coding/Grounded Theory, thematic analysis)
- [ ] Code data on the basis of selected strategy
- [ ] Identify key emergent themes
- [ ] Review data to identify negative cases or missed themes

Step 5: Produce results

- [ ] Summarize and interpret findings on the basis of research questions
- [ ] Report and disseminate findings
- [ ] Use findings for data-driven planning