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Developing your research question

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5.1 Introduction

When many people think of 'research design', they think of choosing methods or a methodology. But the design for a qualitative project should also consider existing research, epistemology, and how you are going to select methods, recruit participants, and analyse the data. This section will take you step by step though all the different parts you should consider.

We know you want to just get out there and do the research, but setting things up carefully and with the right infrastructure and permissions in place can save you time and stress later on. We don't expect you want to intentionally do poor research or harm, but it's important to consider your research design thoroughly so you can make sound decisions later into your projects, and avoid unintentional errors.

This section will help you think about your research question and the types of planning documents you may be expected to produce around your research. This will demonstrate your own competence and help to meet expectations around research integrity.

5.2 Selecting a research topic

When you are starting your project, it can be daunting to narrow down to one topic.

It can be helpful to list a handful of topics you're interested in, before you start to consider more specific problems in one of them. Joyner et al. (2018) is writing specifically about dissertations, but suggests some great practical criteria for selecting a topic which could be used for

any type of research. You could use these to evaluate both your broader topics, and questions/problems within one specific topic. We have summarised and added to their criteria below:

- **Professional interest, and continuing professional interest**: What is the significance of the topic to your field? Are you likely to make a new contribution to this topic or does it appear that everything has been done already? Is the topic well established or more 'trendy' (in which case, it may risk becoming outdated quickly)? Arguably no topic ever achieves enough research to be fully 'done': it's not possible to achieve the full nuance of any topic, and every researcher's contexts and contributions are unique. Repeating a well-covered topic, but in a new context (such as geographical location, or working with people who are under-represented in the existing research) or a new theoretical angle, is likely to produce quite different results.
- **Personal interest**: Obviously it is important to select a topic you are happy to spend time researching in depth. You may already have some grounding in your interest, or you could consider something you are personally curious about, but for which you don't have a huge amount of knowledge at the moment.
- **Knowledge, experience and skills**: Your pre-existing knowledge in a field can be helpful and make specific topics more of a practical choice. You can't skip researching around your specific topic for this project, but you can make the process smoother if you already have some grounding in the topic and know the typical methods used or terms to search for.
- **Likely support**, such as research supervisors, journals, and funding boards who may already have an interest in the topic.
- **Time required**: Is the topic narrow enough that it is researchable to the deadline you have to meet? This can be tricky to determine, but can be helped by reading pre-existing research in the topic. Even just the title or abstract can give a good idea. Consider the differences in scope offered by the title of a research article or short report, versus the title of a research monograph or thesis which has more space to expand. You will note that even the latter has to be quite specific to be realistically achievable.
- **Accessibility**: How practically doable is this topic? Do you have the support of your management or research board to cover this topic? Do you expect to need gatekeeper approval (more on this in Part 3) to access participants?
- **Professional significance and career advancement**: Ideally, we want to do research that will benefit the people it's about. But a key component in being able to achieve positive

research outcomes is building your own reputation, which can help you to attract funding and give you financial security to dedicate more time to your projects. The topics you work in will become part of your reputation as a researcher. Do you want to become known as a specialist in this topic? If you are looking to advance your research career with this project, does the topic tend to play well to your management or potential future employers? Of course, when you choose your topic it's also worth considering whether your professional interests and participants' interests may be at odds, and how to avoid this. Read chapter 7, on academic extractivism, to find out more.

At the preliminary planning stage, you may just need a narrowed-down topic, and perhaps a selection of possible research questions within that topic, but note you may be required to submit a more specific research question (even just provisionally) as part of PhD or funding requirements. But ideally, you will finalise your research question after you have completed your literature review, as your reading will help you identify where you can best expand on your topic.

5.3 Literature review

Before you even begin to design a qualitative study, you need to do at least a basic literature review. This should aim to find out:

- How much is already known about this topic?
- Has this been done before?

You might find that something similar has been done, possibly in a different population group, or with a different focus. But you might have a good reason to suspect that something would be different in a different population. With in-depth qualitative approaches, there might be something more complicated underneath that the original studies did not fully explore or explain, which you could investigate in your own project in more detail.

A good literature review should start by looking at both qualitative and quantitative research, because a large quantitative study might be really good context for a follow-on qualitative study that can explain trends, questions and unexpected findings in the research.

How to select good papers for a literature review

When you start to explore a topic for a literature review, the process can be quite overwhelming at first. The number of papers may be in the hundreds (or even thousands!).

I would begin first by identifying key search terms for your topic area. Make sure you cover subareas as well as the main topic area. Then, enter these terms into your research databases and search engines, noting down if you needed to modify any to achieve more relevant results.

Check the specialist databases your library subscribes to for your research area. This can open up many more papers and book chapters than would normally be available just in Google Scholar. Additionally, consult your librarian for any print-only resources which may be helpful.

From the search results in these databases, you will probably find it helpful to gather papers and their abstracts in one place. A free tool like Zotero can help you do this quickly and automatically, or you could do it manually in a spreadsheet, or qualitative analysis software. Read all of the paper abstracts, and based on this, rank them on a scale of 0 to 3, where 3 is 'this is an extremely relevant paper to my research topic', 2 is 'this has some relevance to my research topic', and 1 is 'this is vaguely associated with my research topic'. 0 can be for papers that you may have mistaken to be about something else (e.g. 'qualitative analysis' is also a term used in chemistry, with a different meaning to that of the social sciences).

Open the papers that you ranked as a '3', and skim them. Set a timer for 5 or 10 minutes, and try to summarise them in writing based on what you skimmed. Again, assess how relevant they are. If they remain relevant, set them aside to read in full. If they seem less helpful (or lower quality, as we explore below), mark them as skimmed and move on. This is a small-scale, less rigorous version of the types of study sampling you might find in published systematic reviews.

Once you have the papers you intend to review in detail, start to take detailed notes on their ideas and conclusions. It can be helpful at this stage to write down particularly important points or arguments on index cards, so you can group similar (or contrasting) findings together. There are also applications to help you do this, like mind mapping software or a note-taking app like Roam Research. Whatever system you use, always make sure it's clear which paper said what. From these notes, you can begin to write your own literature review, and use it to identify where your own research is going to intervene with new data or counterpoints.

Judging the quality of qualitative research papers

I've mentioned before how the general public are very quantitatively literate: we are used to dealing with news containing graphs, percentages, growth rates, and big numbers, and they are common enough that people rarely have trouble engaging with them.

In many fields of studies this is also true for researchers and those who use evidence professionally. They become accustomed to p-values, common statistical tests, and plot charts. Lots of research uses quantitative methods and data presentation techniques, and researchers are almost always familiar with and trained for quantitative data, so it becomes a lingua franca for researchers across disciplines and regions.

However, I've found in previous research that many evidence based decision makers are

not comfortable with qualitative research. There are many reasons for this, but I frequently hear people essentially say that they don't know how to appraise it. While they can look at a sample size and recruitment technique and an r-square value and get an idea of the limitations of a study, this is much harder for many practitioners to do with qualitative techniques they are less familiar with. I frequently come across this barrier to promoting qualitative research in public sector organisations.

But this needn't be the case. Qualitative research is not rocket science, and there are fundamental common values which can be used to assess the quality of a piece of research. There are many guides and toolkits that anyone can use to examine and critique a qualitative study, even if the user is not familiar with qualitative methodologies.

In their guidelines for charities, New Philanthropy Capital offer five key quality criteria, that the research should be: Valid, Reliable, Confirmable, Reflexive and Responsible (McLeod & Noble, 2016). Other criteria, like those by Kuper et al. (2008) and the Critical Appraisal Skills Programme (2024) checklist, suggest asking specific questions of the methodology, which we have collated below:

- Was the sample used in the study, and the recruitment strategy, appropriate to its research question?
- Is a qualitative methodology appropriate?
- Was the research design appropriate to address the aims of the research?
- Were the data collected appropriately, in a way that addressed the research issue?
- Were the data analysed appropriately and sufficiently rigorously?
- Can I transfer the results of this study to my own setting?
- Has the relationship between researcher and participants been adequately considered?
- Does the study adequately address potential ethical issues, including reflexivity?
- Overall: is what the researchers did clear? Is there a clear statement of findings?
- How valuable is the research (e.g. for your context)?

All of these are useful questions to keep in mind, but there are many other criteria to choose from when completing your review. The International Centre for Allied Health Evidence at the University of South Australia has a list of critical appraisal tools, including ones specific to qualitative research ("Guides", 2019). Another set of guidelines from the Occupational Therapy Evidence-Based Practice Research Group at McMaster University in Canada (Letts et al.,

2007) is more detailed, and is also available in multiple languages and an editable Word document.

Finally, Roller and Lavrakas (2015) have a textbook that covers many of these issues in research, and details the Total Quality Framework that can be used for designing, discussing and evaluating qualitative research. The book contains specific chapters on detailing the application of the framework to different projects and methodologies. Margaret Roller has also written online about weighing the value of qualitative research, including some examples of the Total Quality Framework (Roller, 2017).

In short, there are a lot of options to choose from, but the takeaway message from them is that the questions are simple, short, and largely common sense. However, the process of assessing even just a few pieces of qualitative research in this way will quickly get evidence-based practitioners into the habit of asking these questions of most projects they come across, hopefully increasing their comfort level in dealing with qualitative studies.

The tools are also useful for students, even if they are familiar with qualitative methodologies, as it helps facilitate a critical reading that can give focus to paper discussion groups or literature reviews. Adopting one of the appraisal techniques here (or modifying one) would also be a great start to a systematic review or meta-analysis.

Using qualitative analysis software for literature reviews

Qualitative software is a great tool for doing literature reviews! You can bring in PDF files of your textbook chapters or journal articles, and not only create a bibliography, but also code important themes and discoveries across them. It makes it easy to compare across papers, and when you come to write up, you can quickly find all the quotations from the literature you want to quote (and be able to see where they come from).

You've probably heard of or even used a reference management software like EndNote, Mendeley or the free and open-source Zotero. However, while these tools are great for doing your references at the end of a project and integrating with Word or LibreOffice, there are still major advantages to using qualitative analysis software like Quirkos.

While most reference management software focuses on bibliographical data, CAQDAS/QDAS tools focus on the content of the article itself. While they can still store and export information like publication year, author and titles, they allow you to dive into the text of the article itself, and start to cross-reference particular themes and topics within the literature.

This is where a literature review can get really interesting. Create a coding framework for key questions in your research, and code specific sections of articles or books that cover that topic. Once you have done this across different articles, you will have a quick, easy and referenced way to write the literature review section of a thesis. When you are talking about, for example, different interpretations of the concept of stigma in the literature, you can show

quotations from different authors that agree or disagree, and use this to structure the question.

5.4 Forming a research question

Now that we have talked about identifying a topic and researching around it, it's time to get into the specifics of creating your research question.

You didn't decide to do qualitative research before considering the question, right? As we've already mentioned, that's the wrong way round. The research question, what you want to find out, should always choose the methodology, not the other way around. However, sometimes an assignment tells you to use qualitative methods — that's a good exception!

Otherwise, when you are designing a study, you should always start with your research question. Your question will help determine everything you plan for your project beyond this point. You need to know the precise subject of your research and what you want to know about it, so you can determine the methods and methodological frameworks that may be suitable.

As we've discussed, questions for a qualitative study will generally be exploratory: the question will be open (e.g. 'What is the experience of X...?', or 'How does X...?'), but at this point will need to be specific enough to determine your sampling/recruitment, data collection and analysis strategy. Questions which ask about the experience of a group of people can be good grounds for interpretative phenomenological analysis (IPA), while questions around language usage in official policy documents might be best suited for discourse analysis.

You also need to ensure that the subject of your research is narrow enough for the research to be achievable. You might decide you are going to work with an organisation with which you are already familiar and have established a relationship, in which case they could be referenced in your research question (often in research questions, you might see 'in an [institution/non-profit organisation/workplace] based in [Country/City]', instead of their specific name, as there is some expectation that the results will also be insightful for related locations and organisations).

Also, questions should not be leading, in that they should not imply a conclusion you have already arrived at (e.g. 'How does X result in Y?'). You can still consider the same criteria as in section 5.2 to ensure your question is practically answerable for the context you're working in, and relevant to your own goals as a researcher.

5.5 Selecting a qualitative method

When you know what to ask which people, you can start to think about how. This is usually when qualitative methods are chosen – when it becomes clear that the conditions are right,

and that a qualitative study is suitable! There are many methods to choose from: interviews, focus groups, ethnography, diaries, and many more beyond these basic and well-known ones, such as creative and alternative methods. We will explore all of these tools for gathering data in Part 3.

You can also do 'mixed methods'. This technically means using more than one type of method, even if they are all qualitative. However, the term most often means combining qualitative and quantitative methods. This can be very powerful because it gives you the combination of a statistically significant finding which might apply to a large population, and a deep qualitative understanding of the reasons behind that finding. However, combining these different types of data in a meaningful way is a serious challenge, and if you are planning a mixed methods study, you will want to consider how to triangulate the results. We discuss this further in Part 3, **Gather data**.

5.6 Method and methodology

It is important to think about *both* method and methodology when you are planning your research, but first, what is the difference between the two?

Put very simply, **Method** is what you are doing: your tools or instruments (interviews, surveys, questionnaires, observations, artefacts, tests).

Methodology is why you are doing it that way: your reason for using that method and the approach you will take with the method. (For now we will treat methodology and epistemology as the same thing). Without a methodological framework you are applying your tools (or methods) bluntly to your problem.

For example, there are many approaches to an interview. Will you ask predetermined questions? Will they be in a set order? Will you accept deviations from your question list? Your epistemological beliefs will determine your answer. You may be using a qualitative tool, such as an observation or focus group, but are you using a qualitative methodology? Just using these tools doesn't make your research 'qualitative'. Perhaps you are just using a qualitative method, but applying quantitative analytical approaches. Don't worry, it's not wrong to use a different philosophical approach with qualitative tools, but you should know at least broadly what your epistemological approach is, and be able to justify it.

As you learn and develop your thinking, your position will change. You might find yourself swinging quite wildly between approaches as you read and understand new things. As you learn more, you will become more secure with your own views and how they apply (or how they may need to change and adapt) to any particular context, purpose or time.

5.7 Research design: questions to ask yourself

While you consider your method and methodology, you will need to start thinking about how to prepare for the unique context of your study.

Socratic framework

There are many ways to address the question of what you need to have, know and do before you gather data, but I have two favourite frameworks. The first is a simple set of Socratics: **Who, How, What, When, Where**.

For example, if you think you will gather interview data:

- **Who** will you interview? Why them? Who else? Who is unsuitable?
- **How** will this affect the things I will say? How will I get them started? How will I know when we are finished? How will I get there?
- **When** will the interview take place? When does this need to be communicated to others? When will I analyse and report on my data?
- **What** do I need from them? What have I already told them? What do they need to know? What will I tell them? What will I do? What do I need to bring with me?
- **Where?** This is not just the setting of the interview, but also the logistics of getting to where the interview is, and back home again. Where do things fit in the overall timeline of your project?

You might have noticed that one of the Socratics is missing — **'Why?'**. It's all too easy to demand 'Why?', but it's maybe a lazy question, more suited to primary school Q&A than a sophisticated academic invitation to explore or uncover. It can also seem a bit pushy and interrogating and so put people on the defensive and you might just elicit knee-jerk responses, like 'I don't know'. There are often better questions, such as 'What led you to that decision? What do you think they were hoping to achieve by doing that? What was your motivation for that?' However, when used sparingly and with care, 'why' can be incredibly powerful.

A purpose framework

One excellent question to replace 'Why' is 'What is the purpose?'. I call this the Purpose Framework, drawn from the work of the anthropologist, Gregory Bateson (Goodbun, 2022; Palmer, 2022). The central question of this framework is the very philosophical sounding 'What is my purpose?' However it can be applied practically to direct your effort. The things that you do

in your project and the decisions you make should move you towards your ultimate purpose, which may simply be to produce a project report on time, on budget, of sufficient quality to meet expectations, and done with sufficient care to have done no harm. But we are often motivated by more than such utilitarian aims, and are presented with choices that are far from simple. So this framework adds some context to prompt you in thinking more specifically about your context and the context of your research participants.

Example purpose questions

- **The person** – This links with the 'who' and 'what' of Socratics. Who are they? What's their context? Are there cultural norms that I need to understand? What's the benefit for them in agreeing to participate in my project? What is their purpose in agreeing to take part?
- **The research** – This links to the 'How' and 'What' of Socratics. What is the research design? Is it just a one-off face to face interview, or are there different or more complex design elements (telephone interview, video recording, scene-setting activities, elicitation devices, participant-led data collection tools to discuss and hand over).
- **Environment** – This clearly links to the 'where' of Socratics. Do you have control over the environment that you'll be in? If not, who does? Will you be in someone else's home? What do you need or not need? What is nice to have, and what is essential? Have you communicated this?
- **You** – This leads nicely to 'you'. It is appropriate that you should focus on your participants and the research purpose, but don't forget about you, and your needs in all of this.
- **Technical** – this also links to the 'How' of Socratics. This is not just about the electronic gadgetry and software that you will use to gather, store, manage and analyse your data, but also your technical skill. What skills do you need or need to develop or practise them further before you start gathering your data?
- **What else?** – Every research context is unique and this question is here to remind you to keep thinking, outline your assumptions and identify gaps in your thinking. It's also helpful if you meet a barrier. 'What else could I do? What's plan B?'

In the next chapter, we will help you to consider the practical organisational requirements of your research. At all stages of the process, it will remain important to stay anchored to your research question.

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