RESEARCH PROJECT LIFECYCLE

Full Research Plan: Mixed Methods

Stage: Research Development → Gate 3 · Other versions: Trials and Quasi-Experiments (the main Full Research Plan), Questionnaires and Surveys, Interviews and Focus Groups, Secondary Data Analysis

How to use this form

Use this version of the Full Research Plan when the study **combines two or more methods**: a trial or quasi-experiment, a questionnaire, interviews or focus groups, or analysis of existing data. It sets out each method and, most importantly, **how the findings will be brought together**, before any data is collected or analysed. It doubles as your **pre-registration**. It takes **four to eight pages**, depending on how many methods you use.

- **Who completes it:** the Research Lead.
- **Who checks it:** the Ethics Reviewer, then the Gate 3 Reviewer, as part of the Gate 3 Readiness and Project Sign-Off.
- **Start with the questions, not the methods.** Each question should be answered by the method best suited to it. Section B links them.
- **Only complete the sections you need.** Section C lists the four methods. Pick Yes for each one you will use, then fill in only those sections. Delete the rest. In the app, sections marked No are hidden.
- **Plan the integration now.** Mixed methods adds most when you decide in advance how the parts will inform each other, and what you will do if they disagree.
- **Large trials need the full plan.** If the trial is the main part of the study, complete the Trials and Quasi-Experiments version as well and attach it.
- **Changes are allowed, but must be visible.** After sign-off, record every change as a dated amendment with the reason.

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A. The project

Most of this section carries forward from earlier templates. Check it is still right.

Field	Your answer
A1. Project title *(essential)* As on the Feasibility and Business Capability Assessment.	
A2. Project reference From the Research Portfolio Register.	

Field	Your answer
A3. Research Lead *(essential)* Name and role.	
A4. Gate 2 decision date *(essential)* The date the project was judged "This research project is feasible".	Date: ____ / ____ / _____
A5. Plan version *(essential)* For example, version 1.0. Every amendment after sign-off gets a new version number.	

B. Questions and methods

Field	Your answer
B1. Main research question *(essential)* The overall question the study will answer.	
B2. Sub-questions and the method for each *(essential)* List each sub-question and the method that will answer it. For example: "Did attendance improve? Trial." and "Why did some families drop out? Interviews."	
B3. Why mixed methods *(essential)* What combining methods will tell you that one method alone could not.	
B4. Why this matters *(essential)* A short summary of the evidence and the gap this study fills, and who will use the findings. Carry this forward from the Evidence Scoping Summary and update it.	

C. Methods included

Pick Yes or No for each method. Complete the matching section for every Yes, and delete the sections marked No.

Field	Your answer
C1. Trial or quasi-experiment *(essential)* Complete section D.	☐ Yes ☐ No
C2. Questionnaire or survey *(essential)* Complete section E.	☐ Yes ☐ No
C3. Interviews or focus groups *(essential)* Complete section F.	☐ Yes ☐ No
C4. Secondary data analysis *(essential)* Complete section G.	☐ Yes ☐ No

D. Trial or quasi-experiment

Complete this section only if C1 is Yes.

Field	Your answer
D1. Design *(essential)* Pick one. **Randomised controlled trial (RCT):** individuals are randomly allocated. **Cluster RCT:** groups, such as schools or teams, are randomly allocated. **Quasi-experimental:** a comparison group is built without random allocation.	☐ Randomised controlled trial (RCT) ☐ Cluster RCT ☐ Quasi-experimental ☐ Other
D2. Participants and allocation *(essential)* Who is eligible, how many, and how they are allocated to the treatment group and any control group.	
D3. Primary outcome *(essential)* One main outcome, how it is measured, and when.	

Field	Your answer
D4. Sample size and power *(essential)* The number needed to detect the smallest effect that would matter, and the assumptions behind it.	
D5. Main analysis *(essential)* The model for the primary outcome, and how missing data will be handled.	
D6. How will you track delivery in all groups? *(essential)* How you will measure the rate of delivery in each group: who was offered the treatment, who received it, and how much they received. Track any control group too, so you know what they received and whether anyone received the treatment by mistake. Say who records it, how often it is checked, and the level of delivery you will treat as acceptable.	
D7. How will you make sure the treatment is delivered well? *(essential)* Your strategies for making sure the treatment is delivered as intended, and that delivery capability is as strong as it can be. For example: training and guidance for staff, a named delivery lead, enough capacity for the expected numbers, regular check-ins, and a plan for staff changes. Say what you will do if tracking shows delivery falling short, in the treatment group or the control group.	

E. Questionnaire or survey

Complete this section only if C2 is Yes. It covers closed and open questions.

Field	Your answer
E1. Who will be asked *(essential)* The target population and how they will be selected.	
E2. Sample size and expected response *(essential)* How many people you will invite, and the response rate you expect.	
E3. The questionnaire *(essential)* Where the questions come from, any validated measures used, and how it will be piloted.	
E4. How it will be completed *(essential)* Pick one.	☐ Online ☐ Paper ☐ Telephone ☐ In person ☐ More than one
E5. How will you maximise response rate? *(essential)* A low response rate can stop the study answering its question, and the people who reply may differ from those who do not. List the steps you will take. For example: a short questionnaire, a trusted sender, advance notice, reminders, a format that works on a phone, or a thank-you for taking part. Say how you will monitor responses as they arrive, and what you will do if the rate falls below your target.	
E6. Analysis *(essential)* How closed answers will be summarised or tested, and how open answers will be coded.	

F. Interviews or focus groups

Complete this section only if C3 is Yes.

Field	Your answer
F1. Method *(essential)* Pick one.	☐ One-to-one interviews ☐ Focus groups ☐ Both
F2. Who and how many *(essential)* Who will take part, how they will be chosen, and how you will decide you have spoken to enough people.	
F3. Topic guide *(essential)* The main topics and questions. Attach the guide.	
F4. Analysis *(essential)* The analysis approach, who will code the data, and how interpretations will be checked.	

G. Secondary data analysis

Complete this section only if C4 is Yes.

Field	Your answer
G1. Data access *(essential)* Pick one, then name the datasets and who holds them.	☐ Access already in place ☐ Agreement needed ☐ Open data
G2. Data quality *(essential)* Missing data, recording errors, or changes in recording over time.	
G3. Variables and study period *(essential)* The main measures, each defined exactly as it appears in the data, and the period covered.	
G4. Analysis *(essential)* The method for the main question, and any checks on the findings.	

Field	Your answer
G5. Have you already seen or analysed this data? *(essential)* Pick one, then explain. Be honest: prior access does not stop you pre-registering, but readers need to know.	☐ No, not seen ☐ Seen, not analysed ☐ Already analysed in part

H. Bringing the findings together

This is what makes the study mixed methods rather than several studies side by side.

Field	Your answer
H1. Sequence *(essential)* Pick one. **At the same time:** methods run in parallel. **Qualitative first:** for example, interviews shape the questionnaire or the intervention. **Quantitative first:** for example, interviews explain trial or survey results. **Several phases:** methods alternate across stages.	☐ At the same time ☐ Qualitative first ☐ Quantitative first ☐ Several phases
H2. How the methods connect *(essential)* How one method will inform another. For example: survey results used to choose who is interviewed.	
H3. How findings will be combined *(essential)* For example: a joint table comparing findings for each question, or following one theme across all methods.	
H4. If the findings disagree *(essential)* What you will do if methods point in different directions, and how this will be reported.	
H5. Data collection starts *(essential)*	Date: ____ / ____ / _____
H6. Combined report due *(essential)*	Date: ____ / ____ / _____

I. Limitations

Field	Your answer
I1. Known limitations *(essential)* The main limitations of each method used, and of how they are combined.	
I2. What the findings can and cannot tell us *(essential)* Only a trial or a well built comparison can show whether something caused a change. Say which conclusions rest on which method.	

J. Pre-registration

Register this plan before any data collection or analysis starts. See the ResearchCore guide "Where to Pre-register" for options in different fields, including internal registration and your own website.

Field	Your answer
J1. Where it is registered *(essential)* Pick one.	☐ External registry ☐ Registered Report ☐ Internal pre-registration ☐ Our own website
J2. Registry name and reference The registry, the ID or link, or the internal document reference.	
J3. Date registered *(essential)*	Date: ____ / ____ / _____
J4. Embargo until If the details are hidden until a later date.	Date: ____ / ____ / _____

K. Plan status and sign-off

Field	Your answer
K1. Plan status *(essential)* Pick one.	☐ Draft ☐ Ready for Ethical Oversight ☐ Signed off ☐ Amended after sign-off
K2. Signed off by *(essential)* Research Lead name and role.	
K3. Sign-off date *(essential)*	Date: ____ / ____ / _____
K4. Amendments after sign-off List each change: the date, the version number, what changed and why.	

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