

# Applying Mixed Methods and Qualitative Approaches to Social Policy Questions



## Summary of 2022 OPRE Methods Meeting

OPRE REPORT #2023-162  
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The Office of Planning, Research, and Evaluation (OPRE) is tasked with learning about Administration for Children and Families' (ACF) programs and the populations served by those programs through rigorous research and evaluation. To fully describe how, when, and why a program works, OPRE employs research methods that can best answer the given research questions, whether those methods are qualitative, quantitative, or an integration of the two. OPRE consistently works to enhance the rigor, relevance, transparency, independence, and ethics of its work.

Integrating qualitative and quantitative methods in a mixed methods approach enables researchers to answer questions that one approach alone cannot. For example, by using a sequential design to first conduct a survey of program participants and then supplementing this data with interviews or focus groups, researchers can gain important context for the survey findings. In this case, qualitative findings can offer an in-depth understanding of an issue and answer a distinct set of questions. Qualitative inquiry can also reveal gaps and help researchers uncover ideas to improve program design, delivery, outreach, or other important elements that may not be discovered through quantitative methods alone. Using qualitative approaches independently or mixing quantitative and qualitative methods can also provide opportunities for participatory

involvement from communities that are the focus of research. For example, several arts-based, qualitative methods allow research participants to guide the focus of a data collection, like a focus group using Photovoice. In turn, this process can enhance equity in the research process by helping uplift and center participants' voices and perspectives, creating space to learn more about program participants' motivations and experiences.



On October 19–20, 2022, ACF's OPRE hosted a virtual meeting that convened researchers, evaluators, federal staff, and others working in different human services areas to explore how mixed methods research approaches, along with qualitative methods within those approaches, can be applied to social policy and program evaluation. OPRE collaborated with a working group to plan the meeting and the working group members, all experts in qualitative or mixed methods. The group advised focusing the first meeting day on qualitative methods and then shifting to

mixed methods on the second day. The goal of this planning strategy was to ensure all the attendees had a strong understanding of qualitative methods before turning to a discussion about combining quantitative and qualitative methods, considering most OPRE staff and other meeting attendees are trained in quantitative methods. The meeting addressed the following questions:

- ▶ What role do mixed and qualitative methods play in policymaking? What role could these methods play?
  - ▶ How can researchers and evaluators ensure rigor, credibility, and other considerations for high-quality mixed and qualitative methods in their work?
  - ▶ How can mixed and qualitative methods promote equity in research and evaluation by incorporating participant voices from a diversity of groups?
  - ▶ What are the potential benefits of using mixed and qualitative methods in research across various human services settings? What are the challenges to conducting this type of research?
  - ▶ What study designs are appropriate for the research questions that decision makers need answered? What are some examples of mixed methods approaches that could apply in this context?
  - ▶ How can researchers ensure that appropriate human subjects protections are applied when using qualitative methods?
  - ▶ How does the terminology used in qualitative approaches differ from that of quantitative approaches? How can these terminology differences be reconciled?
- ▶ What are examples of mixed methods approaches that researchers and evaluators have successfully applied in the context of human services evaluation (i.e., how can researchers use qualitative data to inform the appropriateness or applicability of a quantitative measure for a given population)?
  - ▶ How can researchers and evaluators integrate qualitative and quantitative data in the context of evidence reviews?
  - ▶ How can researchers and evaluators effectively and accurately interpret and communicate the results of qualitative inquiry and mixed methods research?
  - ▶ What are the key considerations when implementing mixed methods designs in federally sponsored research?

This summary describes themes from meeting presentations and discussions. Each section of this document corresponds to a meeting session or collection of sessions. The full meeting agenda appears at the end of this document for reference.

### **Qualitative Research or Inquiry?**

Several 2022 Methods Meeting speakers advocated for using the term “qualitative inquiry” rather than “qualitative research.” They explained that inquiry is a term that signals openness to questioning each step along the research path instead of following the more prescriptive step-by-step path associated with research. In qualitative inquiry, researchers should cohere to a methodology and can aim for certain milestones but be willing to get there in unanticipated ways—for example, by adding a different form of data collection into the design or rethinking the outputs of the project in light of collected data.

## WHY QUALITATIVE METHODS? SHOWCASING TWO RECENT STUDIES

### Speakers

**Vanessa Hiratsuka, Co-Director of Research and Evaluation and Assistant Professor, University of Alaska, Anchorage Center for Human Development**

**Maria Mayan, Associate Director, Community University Partnership, and Professor, University of Alberta, School of Public Health**

Speakers opened the first session of the 2022 OPRE Methods Meeting by establishing key differences between qualitative and quantitative methods. While quantitative studies test hypotheses and use numbers to relate variables, qualitative inquiry explores general research ideas and analyzes perceptions, beliefs, and understanding of groups of people. One speaker described qualitative inquiry as “positively unpredictable” because responses to open-ended questions enable researchers to generate new ideas and uncover novel problems or opportunities. Qualitative inquiry is flexible, both in the data collection and in the analysis process, enabling researchers to gain meaningful insight into an individual’s perceptions of a phenomenon. New research questions often arise as participants share their experiences, and these questions may change the course of the research study.

A highlight of qualitative inquiry is person-centered practice. Person-centered practice puts the person at the center of the research and enables individuals to tell their own stories, preserving their voices and

perspectives. This approach requires qualitative researchers to establish good rapport, confidentiality, and trust with research participants both during and after data collection. Achievement of these goals builds relationships that result in better information and data collection for the study.

After sharing research questions and data collected from a study the first speaker conducted on fetal alcohol spectrum disorders, she discussed the process of *member-checking*. Through this process, findings are shared with participants who engaged in the data collection, enabling researchers to gather input from members of the community at the focus of the research on the themes and findings that emerged from data analysis. This process provides an important opportunity for researchers to explore the credibility and resonance of their results. Member-checking can be integrated as early as the research design phase. The process will look different based on the research design and whether researchers interact with participants one on one or in a group setting.

“We end up typically using focus groups and interviews with populations that are easy to access or who readily participate with us. You can generally guess who those people are. Who generally participates in qualitative interviews and focus groups? Your guess? It’s white, middle-class women. So, we must ask ourselves, how relevant is research based on data that excludes the experience [of someone] who doesn’t want to sit opposite of a researcher, make eye contact with them, talk about their personal information.”

—Dr. Maria Mayan, University of Alberta, School of Public Health

The second speaker highlighted *arts-based research*, a data collection methodology that systematically uses artistic processes to explore, understand, and represent the human experience. An example of arts-based research is Photovoice, which involves equipping participants with cameras to capture their perspectives on a topic or issue through their own eyes. Arts-based research can be helpful when trying to understand a phenomenon that is abstract or difficult to articulate. It accommodates potential language barriers and literacy levels and can affect researcher-participant rapport by encouraging relationship building. Arts-based research is more inclusive of community members because it provides unconventional opportunities to participate in research.

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## TIME, PEOPLE, AND MONEY: QUALITATIVE INQUIRY DESIGN CONSIDERATIONS

### Speakers

**Vanessa Hiratsuka, Co-Director of Research and Evaluation and Assistant Professor, University of Alaska, Anchorage Center for Human Development**

**Hattie Harvey, Associate Professor, University of Alaska, Department of Psychology**

Two speakers discussed the practical considerations of carrying out qualitative inquiry by sharing their experience planning for a qualitative study that explored perspectives of children living with fetal alcohol spectrum disorders (FASDs). Their research team used a scoping review as a

tool to map key concepts, types of existing evidence, and gaps in the existing research. They also implemented an educator survey and focus groups to answer their research questions.

The speakers emphasized that research approaches and design plans can change over the course of the research project as new findings and ways of thinking about the research questions are uncovered. An audience member asked how the study team made decisions such as combining focus group participants based on characteristics of urbanicity. The researchers explained they had to whittle down a wish list based on realistic considerations. For example, the study team initially had a few ideas about how to group participants, such as by urbanicity, age of the children engaging in the system, and first-hand lived experience. Ultimately, the study team was not able to recruit participants from rural communities or participants with lived experience having FASDs, so they pivoted the design plan from one urban and one rural focus group to two focus groups with both urbanities included. The researchers also had to consider logistics; for example, when participants could take time away from families and jobs to participate in a focus group.

The speakers discussed activities a project team can undertake to improve their study design. They suggested that qualitative inquiry teams reflect on their experiences, interests, and comfort level early in the research process. This assessment can help establish project roles. One speaker also emphasized the importance of discussing the human resources, time, and cost in the

design phase to orient the team and build a foundation for the study. These questions follow:

- ▶ **People:** Who needs to be involved? What are the qualitative inquiry skills of the research team members? What is the comfort level of the team members in conducting team-based qualitative inquiry? What are the expectations of each team member?
- ▶ **Time:** What is the overall project timeline? What are the “need to do” and “nice to do” milestones? Will external deadlines or activities affect the project? How much time can team members devote to different steps of the project?
- ▶ **Money:** What is the overall budget? What are the “need to do” and “nice to do” activities that have a cost? What are the administrative processes and timelines for purchases, contracts, invoices, etc.? When do expenditures need to be completed? Who is monitoring the budget and expenditures, and how often?

Qualitative inquiry can be exploratory, descriptive, and/or explanatory. Exploratory qualitative inquiry investigates a little-understood phenomenon and identifies important variables to generate hypotheses for future research. Descriptive qualitative inquiry documents the phenomenon of interest. Explanatory qualitative inquiry seeks to explain the forces causing the phenomenon in question and explore possible causal networks shaping that phenomenon. The research questions and focus of the study will dictate the type of qualitative methods and the design.

## CONDUCTING RIGOROUS AND RELEVANT QUALITATIVE INQUIRY: EXPLORING METHODOLOGIES

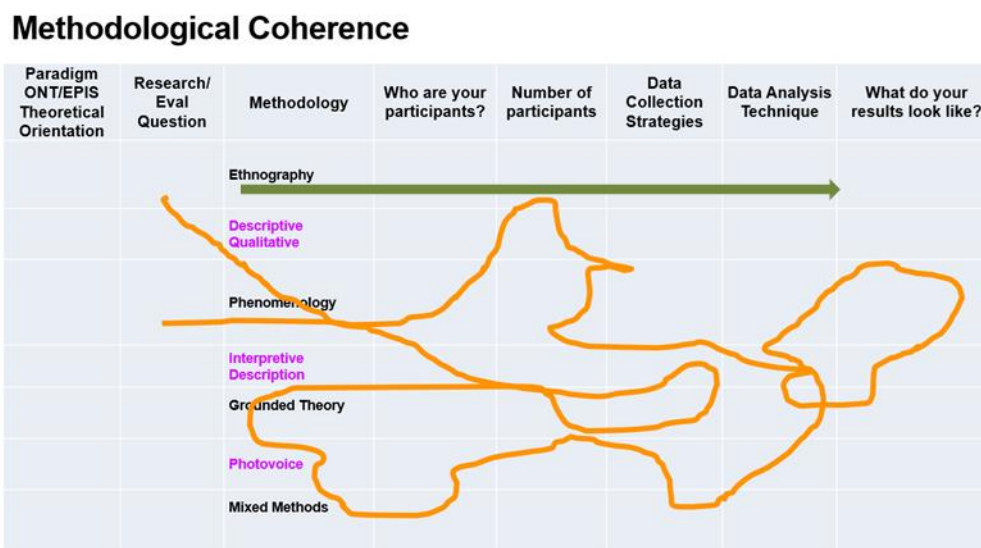
### Speaker

**Maria Mayan, Associate Director, Community University Partnership, and Professor, University of Alberta, School of Public Health**

The presenter shared key strategies to ensure rigor in qualitative inquiry and evaluation. First, she explained the importance of ensuring methodological coherence—the process of designing and conducting a study or evaluation for congruence between the components of methodology. Good research design avoids an “anything goes” methodology, or picking and choosing from every possible qualitative strategy, as demonstrated by the squiggly orange line in figure 1. Instead, researchers should be intentional about which methodology is suited to which research question and analytic technique, illustrated by the straight green line in figure 1.

The second strategy is to employ a variety of verification strategies that help the researcher identify when to continue, stop, or modify the research/evaluation to ensure rigor (see text box on next page).

Figure 1. Qualitative Methodology Selection



—Adapted from Dr. Maria Mayan, University of Alberta,  
School of Public Health

### Examples of Qualitative Inquiry Verification Strategies

- **Triangulation** combines data, investigators, theories, or methods to increase validity.
- **Participant checks** take the developing hypotheses, preliminary categories, and interpretations to the participants to verify the findings.
- **Journal keeping** keeps a record of personal biases and assumptions and fosters reflection on how they may influence the study.
- **Peer review** engages a colleague in an extensive discussion to verify the findings and interpretations.
- **An audit trail** documents decisions, choices, and insights to easily defend the final product.

The third strategy for conducting rigorous and relevant qualitative inquiry is the inclusion of community-based or participatory processes

in research and evaluation. This process builds connections and equitably involves individuals or groups of community members, organizations, community-based organizations, or government to ensure active and informed participation in planning and decision making. This strategy helps ensure the research and evaluation truly reflects the community’s best interests and preferred choices. In a participatory research process, all partners contribute their unique strengths, skills, and resources, with a goal of integrating knowledge and action, to improve the health and well-being of community members. Researchers can reference the International Association for Public Participation’s Spectrum of Public Participation<sup>1</sup> model to choose deliberate language to use when interacting with community participants.

<sup>1</sup> Organizing Engagement. 2022. “Spectrum of public participation.” Website: <https://organizingengagement.org/models/spectrum-of-public-participation/>

In addition, the speaker shared several key questions to consider when conducting participatory research:

- ▶ What political, economic, education, faith-based, cultural, and social issues underlie your research or evaluation topic? How have these issues changed over time?
- ▶ How do or will certain aspects of your identity affect your relationship with participants, data, analyses, and conclusions?
- ▶ What does it mean to be “who you are” when researching or evaluating this program or issue?
- ▶ What are the cultural protocols for the communities you belong to or interface with?



## LESSONS LEARNED THROUGH THE RESEARCH PROCESS

### Speakers

**Vanessa Hiratsuka, Co-Director of Research and Evaluation and Assistant Professor, University of Alaska, Anchorage Center for Human Development**

**Maria Mayan, Associate Director, Community University Partnership, and Professor, University of Alberta, School of Public Health**

Two speakers from previous sessions joined a panel discussion to share lessons learned through the qualitative inquiry process. The speakers began by sharing their advice with meeting attendees about incorporating qualitative inquiry in their work. First, they noted the importance of researchers considering the proximity of qualitative inquiry to lived experiences. Asking questions such as, “What are those lived experiences? What are the aspects of the phenomenon that I might be most interested in? How might we go about eliciting that feedback?” can help researchers begin thinking about incorporating qualitative work into a project. Second, the speakers highlighted the value of seeking feedback from people external to the research team. Researchers should share their findings with the research participants and always be prepared to show their work and answer the question, “How do I know what I know?”

“A lot of what I do as a researcher and evaluator is sit around and listen and let people get to know me and let myself be known.”

—Adapted from Dr. Vanessa Hiratsuka,  
University of Alaska, Anchorage Center for  
Human Development

Pivoting to discuss generalizability, or transferability, in qualitative inquiry, speakers talked about identifying cross-cutting themes and the importance of finding common experiences in a phenomenon while also acknowledging that some experiences are unique, and this does not make them any less interesting. While common, or shared, experiences promote understanding of the phenomenon in other settings, thereby informing transferability, unique experiences can inform the phenomenon and demonstrate nuance.

Speakers again emphasized the importance of gaining community input at the beginning stages of an idea in community-engaged research, rather than bringing the community a preestablished, concrete plan for research. Qualitative researchers should prioritize getting feedback early about an issue’s impact on the community and anticipate negotiation throughout the entire process regarding what the community needs and how the community wants the study to be conducted.

An audience member asked how to reconcile differing perspectives from the community being researched. The speakers advised that if disagreements or conflicting perspectives arise among community members, these

perspectives usually do not need to be reconciled—just noted. Researchers can have a memorandum of understanding with the community, which is a valuable tool to revisit issues and outline an approach to communications if conflict arises.

Speakers concluded with a discussion of qualitative secondary inquiry related to the use of qualitative data collected by a different research team or collected to answer a different research question. Speakers offered several recommendations for conducting secondary qualitative inquiry:

- ▶ Take into consideration the landscape at the time the data were collected.
- ▶ Collect a comprehensive portfolio of background information from the study team (views, program materials, past iterations of data collection materials, understanding of the phenomenon being studied, the question’s origin, and the evolution of the question).
- ▶ Check in with community members and participants to orient them to the data.





## WELCOME TO MIXED METHODS APPROACHES: SHOWCASING TWO MIXED METHODS RESEARCH STUDIES

### Speakers

**Chandria D. Jones, Senior Research Scientist, NORC at the University of Chicago**

**Melina Salvador, Senior Research Associate, James Bell Associates**

Presenters introduced mixed methods approaches by highlighting two examples of mixed methods studies conducted with an inclusive and equitable approach. Mixed methods studies are used to corroborate, clarify, explain, and explore concepts to understand a social phenomenon. Using inclusive and equitable approaches in a mixed methods study requires attention to race, ethnicity, culture, and power dynamics in every phase of the research cycle. Inclusive and equitable research and evaluation require vulnerability and empathy among the research team members as they approach the work. One speaker highlighted her own work centered on a culturally responsive and equitable evaluation framework. This approach is an evaluation paradigm that integrates diversity, equity, and inclusion in all phases of evaluation and shifts power to those most affected by the evaluation process.

One speaker presented an overview of the [Implementation of Evidence-Informed Behavioral Health Models to Improve HIV Health Outcomes for Black Men Who Have](#)

[Sex With Men \(BMSM\) Initiative](#), which involved a process study and an outcome study, each with different aims and research questions. Because the research team had strengths in both qualitative and quantitative methods, researchers used a transformative, sequential mixed methods strategy to collect and analyze relevant outcomes and process measures. Transformative research places central importance on studying the lives and experiences of diverse, often marginalized groups; requires collaborative inquiry to prevent marginalization of participants; and advances an agenda to improve participants' lives. A sequential approach facilitates sequential ordering of data, with one finding building on another, typically in a way that capitalizes on what was learned in the first phase. It includes, at minimum, two distinct data collection phases, one following the other (either qualitative or quantitative), and a theoretical perspective to guide the study. By using multiple phases, this approach gives voice to diverse perspectives to better understand a phenomenon.

The speaker provided recommendations for promoting equity in mixed methods research:

- ▶ Create opportunities for team reflection to examine biases and challenges.
- ▶ Because continuous engagement and collaboration can be challenging, be willing to meet participants where they are.
- ▶ Foster democratic participation, paying attention to power dynamics.
- ▶ Commit to digging deeply into the data by integrating data (merging the qualitative and quantitative datasets) and examining contextual factors.

The second speaker shared her work with the *Multi-Site Evaluation of Tribal Home Visiting* mixed methods study design.<sup>2</sup> The evaluation used a balanced, convergent design, relying on qualitative and quantitative data collection equally to answer the same questions. Because people are more familiar with quantitative than qualitative inquiry principles, achieving a balanced study can require persistent reframing and advocacy to ensure qualitative analysis receives adequate resources. In a balanced, convergent design, not all analyses will use mixed methods approaches. Some may use only qualitative or only quantitative approaches. However, all data are analyzed prior to interpretation in this approach.

Both speakers discussed data parties, a participatory technique to include diverse voices in reviewing and interpreting data before drafting a final report or plan of action. Data parties are time-limited events of several hours, where diverse audience members come together to collectively analyze collected data. These activities improve interpretation and increase the research audience's ownership of data, therefore may better inform programming and policies.

To orient audience members to mixed methods research as an ongoing ethical project, Dr. Melina Salvador quoted Zora Neale Hurston, "Dust Tracks on a Road: An Autobiography" (1942):

*"Research is formalized curiosity. It is poking and prying with a purpose."*

<sup>2</sup> James Bell Associates. (2019). *Introducing the multi-site implementation evaluation of Tribal home visiting (MUSE) research study*. <https://www.jbassoc.com/resource/muse-video/>

## GETTING STARTED: BUILDING BLOCKS FOR DESIGNING A RIGOROUS MIXED METHODS RESEARCH STUDY

### Speaker

**Yuchun Zhou, Professor and Program Coordinator, Ohio University**

A mixed methods scholar described two characteristics common to all definitions of mixed methods research. The first is the inclusion of quantitative and qualitative approaches in a study, used rigorously and according to the requirements of the methodologies. The second is the presence of a purpose for integrating these different approaches. A mixed methods researcher should justify why the inclusion of different strands is needed and how these approaches will be integrated. "Strand" refers to all the steps involved in using a particular method including the development of research questioning and connection in the entire analysis. The speaker introduced various types of basic mixed methods designs that differ in timing and purpose of the integration:

- ▶ **Convergent parallel design** seeks to compare and converge qualitative and quantitative results for a complete understanding. In this design, the timing is concurrent; qualitative and quantitative data collections are conducted simultaneously. Examples of three strategies for merging results include side-by-side comparison, joint display, and data transformation. Challenges of

this design include selecting a paradigm (for example, a pragmatism, dialectic, transformative, or critical realism approach), ensuring validity issues are addressed (for example, samples and variables are the same), and issues comparing and presenting the results.

- ▶ **Explanatory sequential design** aims to explain quantitative results or develop a qualitative strand. In this design, timing is sequential: The quantitative data collection and analysis come first. Challenges of this approach include a longer time for two data collections occurring in two phases, potentially submitting two institutional review boards (IRBs) packages (one for the initial quantitative strand and a second for the follow-up qualitative strand.), and possible issues explaining to readers how the strands are connected and how the qualitative phase will build on the quantitative.
- ▶ **Exploratory sequential design** intends to generalize qualitative results or develop an instrument or intervention. In this design, qualitative data collection and analysis come first. Challenges of this approach include longer time for two data collections given data is collected in two phases, two IRBs, and possible validity issues related to comparability of sample size and characteristics and avoiding overlap between samples.

In a convergent parallel design, the two strands (qualitative and quantitative) are usually balanced, whereas in explanatory and exploratory sequential designs, the priority is usually on the initial strand. The most appropriate choice of research design will

typically depend on the research purpose. If one strand is dependent on the other, a sequential research design would be most appropriate.

While any qualitative and quantitative method can be combined to create a mixed methods study, the speaker reinforced the importance of being intentional about which methods are combined and why. Challenges may arise in certain instances if researchers do not plan properly before deciding to combine certain methods.

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## MAXIMIZING MIXED METHODS: INTEGRATING QUALITATIVE AND QUANTITATIVE STRANDS

### Speaker

**Nancy Leech, Professor, University of Colorado, Denver**

The speaker began the presentation by defining integration as the incorporation or combination of qualitative and quantitative methods approaches at one or more stages of the research process. She noted this process can look different in different studies. Benefits of integration include initiating new understandings, building stronger connections, and gaining a more complete picture of underlying mechanisms. Challenges of integration can include the potential of sacrificing the rigor of individual methods and the lack of documented guidance for researchers on how to successfully integrate qualitative and quantitative methods.

Integration can occur at any stage of the research process and is necessary in any

mixed methods study. Many ways exist to integrate qualitative and quantitative data, and integration should occur at several stages, if possible. Opinions vary on methods of integration and how to conduct mixed methods studies, so the speaker advised researchers to find methodologists whose work resonates with them and be sure to cite them.

As an example, the speaker suggested using focus groups, which collect qualitative “talk data” to ask follow-up questions that delve deeper into people’s thoughts and feelings to illuminate issues identified in the quantitative data. In analyzing talk data, researchers can quantify qualitative data using the following methods:

- ▶ Constant comparison analysis, which systematically reduces data to codes, then develops themes from the codes
- ▶ Classical content analysis, which counts the number of codes
- ▶ Word count, which counts the total number of words used or the number of times a particular word is used
- ▶ Keywords-in-context, which identifies keywords and uses the surrounding words to understand the underlying meaning of the keyword



When analyzing talk data, if one participant is more vocal than others, researchers can create a weighted variable for each person if one person mentions a key topic many times, which could otherwise skew the qualitative analysis. Researchers should avoid discouraging participants from talking in a focus group setting but instead create balance using weighted variables during analysis.

To learn more about the integration process, researchers can read about mixed methods studies, create teams of researchers who bring strengths in both qualitative and quantitative research, and use member-checking to increase qualitative reliability.

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## CONDUCTING QUALITATIVE METHODS AND MIXED METHODS RESEARCH IN A FEDERAL ENVIRONMENT

### Speakers

**Emily Schmitt, Acting Deputy Assistant Secretary for Planning, Research, and Evaluation, OPRE**

**Marc Hernandez, Principal Research Scientist, NORC at the University of Chicago**

**Hannah Betesh, Senior Associate, Social and Economy Policy, Abt Associates**

**Marissa Strassberger, Research Associate, MDRC**

Researchers from contract firms and a representative from OPRE gathered as a panel to address questions about conducting mixed methods studies in the context of the federal government, which often has

contracts with tight timelines. To alleviate problems that may result from such tight timelines, contracts could be sequential, each covering a step of the research process, to provide more time for each step along the way and adhere to federal contract constraints.

Research conducted through federally-funded contracts often requires rigorous approval processes, with little room for adjustments after the approvals have been obtained. Because mixed methods research and analysis can be time intensive, it is helpful to plan each aspect of the research process far in advance to ensure each component of the study is well planned, feasible, focused, and flexible.

Panelists noted that the most successful evaluations include partnerships of external and internal evaluators. One speaker shared that in a recent project that used internal evaluators within federal agencies to help assess a system's functions and identify improvements, the internal evaluators were able to help the research team understand what data were available and what needs within the system were not being met.

To successfully partner with internal evaluators and analysts, one speaker recommended identifying the main goals and challenges facing the internal evaluator and pinpointing how the external evaluation can push them forward. Another speaker added that internal evaluators can be critical of external evaluation because internal evaluators have the knowledge of logic models, previous evaluations, and available data. Prioritizing capacity building for internal evaluators is important to ensure they can

benefit from the work after the external evaluation concludes.

Speakers noted some challenges implementing mixed methods studies, especially since the onset of the COVID-19 pandemic. Qualitative data collection is particularly affected by a lack of in-person activities. While virtual data collection methods are available, they can make achieving equity difficult because of the inherent exclusion of potential participants who lack access to technology. Understanding the context of a program or community and building rapport when not physically present created a challenge for researchers during the pandemic. However, while opportunities were lost, especially related to site visits, many others were gained through virtual interviews, such as the ability to reach geographically dispersed people.

To support research participation in a pandemic era, researchers can:

- Be flexible.
- Increase the recruitment pool when seeking participants.
- Lengthen the duration of data collection.
- Be more inclusive of respondent types.
- Reduce fatigue and burden wherever possible.
- Be concise and clear when recruiting for research studies or evaluations.
- Accommodate study participants' life circumstances.

—Marc Hernandez, Principal Research Scientist, NORC at the University of Chicago

The inherently flexible nature of qualitative inquiry also enabled many studies to pivot at the onset of the COVID-19 pandemic. It

became crucial to try to untangle the role of the pandemic in different settings and its varied effects on people and programs. The pandemic also affected program capacity, including newly developing workforce shortages, challenges keeping staff at work in person, staff exhaustion, declining workforce participation, and worsened capacity constraints that resulted in reduced willingness to participate in research.

## WANT TO LEARN MORE?

To access the online meeting archive, including a detailed agenda, meeting materials, and presentation slides, please visit the OPRE Methods Meeting website at [www.opremethodsmeeting.org](http://www.opremethodsmeeting.org). The site also includes materials from other innovative methods meetings OPRE has organized and will be updated to include future meetings.

### Resources to Learn More About Qualitative and Quantitative Methods

American Evaluation Association Digital Knowledge Hub | American Evaluation Association. 2022, October 13. "Digital Knowledge Hub." Website: <https://www.pathlms.com/aea>

Method Space | SAGE Publishing. n.d. "Methodspace." Website: <https://www.methodspace.com/>

The Coding Manual for Qualitative Researchers | Saldaña, Johnny. 2015. "The Coding Manual for Qualitative Researchers" (3rd ed.). SAGE Publications.

Qualitative Data Analysis with NVivo | Jackson, Kristi, and Patricia Bazeley. 2019. "Qualitative Data Analysis with NVivo" (3rd ed.). SAGE Publications.

A list of further reading materials about qualitative and mixed methods approaches to social policy questions can be found [here](#).

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Office of Planning, Research, and Evaluation  
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## Connect with OPRE



## APPLYING MIXED METHODS AND QUALITATIVE APPROACHES TO SOCIAL POLICY QUESTIONS

### Meeting Agenda

#### Day 1: October 19

##### Welcome

Emily Schmitt, Acting Deputy Assistant Secretary for Planning, Research, and Evaluation, OPRE

##### Why Qualitative Methods: Showcasing Two Recent Studies

###### *Why Qualitative Methods?*

Vanessa Hiratsuka, Co-Director of Research and Evaluation and Assistant Professor, University of Alaska, Anchorage Center for Human Development

###### *Why Qualitative Methods?*

Maria Mayan, Associate Director, Community University Partnership, and Professor, University of Alberta, School of Public Health

*Moderator:* Shariece Evans, Social Scientist, Division of Data and Improvement, OPRE

##### Time, People, Money: Qualitative Research Design Considerations

###### *Time, People, Money: Qualitative Research Design Considerations*

Vanessa Hiratsuka, Co-Director of Research and Evaluation and Assistant Professor, University of Alaska, Anchorage Center for Human Development

Hattie Harvey, Associate Professor, University of Alaska, Department of Psychology

*Moderator:* Shariece Evans, Social Scientist, Division of Data and Improvement, OPRE

##### Conducting Rigorous and Relevant Qualitative Research: Exploring Methodologies

###### *Conducting High Quality Qualitative Research & Evaluation*

Maria Mayan, Associate Director, Community University Partnership, and Professor, University of Alberta, School of Public Health

*Moderator:* Shariece Evans, Social Scientist, Division of Data and Improvement, OPRE

##### Lessons Learned through the Research Process (Panel Discussion)

Vanessa Hiratsuka, Co-Director of Research and Evaluation and Assistant Professor, University of Alaska, Anchorage Center for Human Development

Maria Mayan, Associate Director, Community University Partnership, and Professor, University of Alberta, School of Public Health

*Moderator:* Mina Addo, National Poverty Fellow, OPRE

#### **Summary of the Day and Preview of Day 2**

Shariece Evans, Social Scientist, Division of Data and Improvement, OPRE

#### **Day 2: October 29, 2020**

##### **Welcome to Mixed Methods Approaches: Showcasing Two Mixed Methods Research Studies**

###### *An Inclusive and Equitable Application of Mixed Methods and Qualitative Approaches*

Chandria D. Jones, Senior Research Scientist, NORC at the University of Chicago

###### *Multi-site Evaluation of Tribal Home Visiting (MUSE)*

Melina Salvador, Senior Research Associate, James Bell Associates

*Moderator:* Shariece Evans, Social Scientist, Division of Data and Improvement, OPRE

##### **Getting Started: Building Blocks for Designing a Rigorous Mixed Methods Research Study**

###### *Getting Started: Building Blocks for Designing a Rigorous Mixed Methods Research Study*

Yuchun Zhou, Professor and Program Coordinator, Ohio University

*Moderator:* Shariece Evans, Social Scientist, Division of Data and Improvement, OPRE

##### **Maximizing Mixed Methods: Integrating Qualitative with Quantitative Strands**

###### *Mixed Methods Research: Integrating Qualitative and Quantitative Strands*

Nancy Leech, Professor, University of Colorado, Denver

*Moderator:* Shariece Evans, Social Scientist, Division of Data and Improvement, OPRE

##### **Conducting Qualitative Methods and Mixed Methods Research in a Federal Environment (Panel Discussion)**

Emily Schmitt, Acting Deputy Assistant Secretary for Planning, Research, and Evaluation, OPRE

Marc Hernandez, Principal Research Scientist, NORC at the University of Chicago

Hannah Betesh, Senior Associate, Social and Economy Policy, Abt Associates

Marissa Strassberger, Research Associate, MDRC

*Moderator:* Shariece Evans, Social Scientist, Division of Data and Improvement, OPRE

#### **Summary of Meeting and Evaluation**

Shariece Evans, Social Scientist, Division of Data and Improvement, OPRE