PhD Qualitative Research Proposal Checklist

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Use this checklist to review a doctoral research proposal or synopsis. Tick completed checks, mark pending items P, and record a reason for each item marked not applicable. Keep evidence or proposal page references in your review notes. All wording is newly written for this resource.

Core checks apply broadly; conditional modules apply only to the selected design. University and disciplinary requirements take priority. This comprehensive general guide cannot replace specialist protocols or guarantee that every requirement of every PhD study is covered.

Study title: _____ Reviewer: _____
University and programme: _____ Review date: _____
Proposal version: _____ Review status: _____

Submission requirements

☐ QL001 Confirm the university's current proposal or synopsis instructions, review criteria, submission route and required approvals.

☐ QL002 Check the word limit, language, margins, line spacing, headings, citation style, file type and accessibility requirements.

☐ QL003 Include the required title page, candidate and supervisor details, programme, department, institution, date and version.

☐ QL004 Provide an abstract or summary, contents page, abbreviations and declarations where required; update page numbers.

☐ QL005 Check supervision arrangements, access to expertise and any programme-specific doctoral milestones.

Research problem and doctoral contribution

☐ QL006 Use a focused title that matches the phenomenon or variables, population or material, setting and design where appropriate.

☐ QL007 Explain the background using relevant evidence; distinguish the practical issue from the research problem.

☐ QL008 Demonstrate a specific gap, unresolved debate or methodological weakness through a critical review.

☐ QL009 Explain the intended original contribution to knowledge and distinguish it from simple repetition in another location.

☐ QL010 State who may benefit, why the work matters and the limits of the proposed significance; avoid guaranteed impact.

☐ QL011 Define the scope, boundaries, key terms, unit of study and what is deliberately excluded.

Qualitative purpose and questions

☐ QL012 State an interpretive or exploratory purpose that requires qualitative inquiry.

☐ QL013 Use focused, open questions suited to meaning, experience, practice, context or process.

☐ QL014 Align objectives, questions, evidence sources and proposed interpretation.

☐ QL015 Avoid forcing statistical hypotheses, representativeness or causal-effect claims onto an unsuitable qualitative design.

Literature and conceptual positioning

☐ QL016 Explain the search and selection of relevant methodological, theoretical and empirical literature.

☐ QL017 Synthesise debates, contradictions, contexts and methodological limitations that lead to the inquiry.

☐ QL018 Clarify whether theory guides the study, sensitises analysis, will be developed, or plays another justified role.

☐ QL019 Explain the timing and role of the literature review where the chosen methodology requires flexibility.

☐ QL020 Define key concepts without predetermining findings or imposing a framework that defeats the inquiry.

Methodology and research assumptions

☐ QL021 Identify and justify the qualitative methodology, such as case study, ethnography, phenomenology, grounded theory or narrative inquiry.

☐ QL022 Explain relevant ontological and epistemological assumptions and their consequences for the design.

☐ QL023 Distinguish methodology from collection techniques and analytical method.

☐ QL024 Specify setting, context, period, unit of inquiry and case boundaries where applicable.

☐ QL025 Explain why the chosen approach fits the questions and how credible alternatives were considered.

☐ QL026 Identify methodological guidance and applicable disciplinary requirements for the specific approach.

Researcher position and relationships

☐ QL027 Describe relevant researcher experience, assumptions, background and role in relation to the setting.

☐ QL028 Consider insider or outsider status, prior relationships, power differences, interests and possible influence.

☐ QL029 Explain reflexive practice before, during and after fieldwork and analysis.

☐ QL030 Clarify who will recruit, interview, observe, translate and analyse, and the training or support required.

Sampling and recruitment

☐ QL031 Define relevant participants, cases, documents or sites, inclusion and exclusion criteria and access routes.

☐ QL032 Justify purposive, theoretical or other suitable selection and any intended variation or comparison.

☐ QL033 Explain recruitment, gatekeepers, refusals, withdrawals and protection against coercion.

☐ QL034 Provide an initial sample range where appropriate and a rationale based on information needs and the chosen method.

☐ QL035 Explain how adequacy and stopping decisions will be assessed; use saturation only where methodologically appropriate.

☐ QL036 Allow justified iterative changes and identify when amendments need ethics or supervisor approval.

☐ QL037 Assess whose perspectives might be missing and how this affects the account.

Data generation and fieldwork

☐ QL038 Explain each data source and its relationship to the questions; justify interviews, groups, observation, documents or other methods.

☐ QL039 Specify setting, mode, duration, frequency, personnel and fieldwork sequence.

☐ QL040 Provide draft guides, prompts, observation or extraction tools and pilot or refinement procedures.

☐ QL041 Plan how recording, fieldnotes, contextual observations, repeat encounters and participant materials will be handled.

☐ QL042 For interviews or groups, plan probing, facilitation, group composition, privacy and management of unequal participation.

☐ QL043 For observation, specify researcher involvement, access, consent boundaries and field relationships.

☐ QL044 For documents or online materials, assess provenance, authenticity, context, access and ethical expectations.

Transcription, translation and data preparation

☐ QL045 Specify recording consent, transcription conventions, anonymisation and checks against source material.

☐ QL046 Justify the transcription detail required by the analytic approach, including pauses or interaction where relevant.

☐ QL047 Explain language choice, translation, translator role and checks on cultural or contextual meaning.

☐ QL048 Preserve links between excerpts, source context and analytic records using secure identifiers.

☐ QL049 Plan file naming, versions, transcription access and confidentiality for research assistants or service providers.

Qualitative analysis plan

☐ QL050 Name and justify the analytical approach, such as reflexive thematic, framework, discourse, narrative or grounded theory analysis.

☐ QL051 Explain inductive, deductive or combined reasoning and the role of theory in interpretation.

☐ QL052 Describe familiarisation, coding or other analytic units, comparison and interpretive development appropriate to the method.

☐ QL053 Explain iteration between data generation and analysis where applicable, and how decisions will be documented.

☐ QL054 Clarify team roles, discussions and any codebook; do not require coding agreement for approaches where it is inappropriate.

☐ QL055 Plan attention to divergence, unexpected evidence, context and plausible alternative interpretations.

☐ QL056 Explain how themes, categories, narratives or other outputs will be developed and supported by evidence.

☐ QL057 Name software as an organisational aid where used; distinguish it from the analytic method and researcher judgement.

Quality and interpretive rigour

☐ QL058 Explain what quality means within the chosen philosophical and methodological approach.

☐ QL059 Plan a transparent record of sampling, fieldwork, analytical choices and changes.

☐ QL060 Use reflexive memos and consider the researcher's role in constructing the account.

☐ QL061 Assess contextual description and the information readers need to judge relevance or transferability.

☐ QL062 Consider peer dialogue, triangulation, participant feedback or other strategies only where appropriate and justified.

☐ QL063 Do not automatically equate triangulation or participant agreement with a single true interpretation.

☐ QL064 Plan to represent differences, contradictions and minority perspectives without overstating consensus.

Ethics, safety and data governance

☐ QL065 Identify ethics approval and organisational, community or other permissions required before fieldwork.

☐ QL066 Plan informed and ongoing consent, recording permission and understandable information in appropriate languages.

☐ QL067 Explain voluntariness, withdrawal limits, quotation consent and the point after which data cannot be removed.

☐ QL068 Address vulnerable participants, power relationships, sensitive disclosures, distress, safeguarding and support routes.

☐ QL069 Explain limits to anonymity in small settings and confidentiality limits in focus groups or public spaces.

☐ QL070 Plan researcher safety, emotional burden, lone working and secure or remote fieldwork where relevant.

☐ QL071 Document storage, encryption, access, transfer, retention, deletion, ownership and lawful reuse or sharing.

☐ QL072 Assess disclosure risks in quotations, images and contextual detail; confirm translation and transcription confidentiality.

Conditional qualitative modules

☐ QL073 Case study: define case boundaries, case selection, evidence sources and within-case and cross-case analysis.

☐ QL074 Grounded theory: identify the tradition, comparative analysis, memoing, theoretical sampling and theory-development rationale.

☐ QL075 Phenomenology or IPA: identify the tradition, experiential focus, sampling rationale and interpretive commitments.

☐ QL076 Ethnography: explain field engagement, observation role, access, relationships and representation.

☐ QL077 Narrative inquiry: address time, narrative context, co-construction and how stories will be interpreted.

☐ QL078 Discourse or conversation analysis: justify naturally occurring material, transcription and the chosen analytic tradition.

☐ QL079 Participatory or action research: explain partnership, decision rights, cycles, consent and management of competing interests.

☐ QL080 Digital, visual or arts-based inquiry: address platform context, image or performance consent, ownership and identification risks.

☐ QL081 Qualitative synthesis: justify protocol, searching, selection, appraisal and interpretive synthesis method.

☐ QL082 Mixed methods: also complete the quantitative checklist and specify sequence, priority and integration.

Interpretation and representation

☐ QL083 Explain how quotations or other evidence will support interpretations while protecting identities.

☐ QL084 Avoid inventing participant words, quotations, transcripts, fieldnotes, themes or approvals.

☐ QL085 Plan interpretation against the questions, context and relevant literature without forcing expected findings.

☐ QL086 Distinguish depth and contextual insight from statistical population estimates.

☐ QL087 Consider researcher and participant ownership, representation, disagreement and accessible feedback.

Feasibility, limitations and work plan

☐ QL088 Assess practical access, language skills, training, transcription time, analysis time and supervision capacity.

☐ QL089 Identify likely recruitment or access problems, methodological limitations, implications and contingency plans.

☐ QL090 Provide a timeline covering review, permissions, pilot, recruitment, fieldwork, interpretation, writing and revision.

☐ QL091 Allow for iteration, relationship-building, ethical amendments and supervisor feedback.

☐ QL092 Budget for travel, transcription, interpretation, participant expenses, software and secure storage.

☐ QL093 Outline thesis chapters, dissemination and appropriate participant or community feedback if required.

References and supporting documents

☐ QL094 Verify source details and that citations support the claims; distinguish methodological sources from empirical evidence.

☐ QL095 Match in-text citations and reference entries and apply the required referencing style.

☐ QL096 Attach recruitment materials, information sheets, consent forms, draft guides and relevant access requests.

☐ QL097 Include observation or document protocols, reflexive planning, data-management arrangements, timeline and budget as required.

☐ QL098 Label approvals as pending or granted and mark draft tools accurately; link each appendix from the text.

Final doctoral review

☐ QL099 Assess the originality, coherence, depth, methodological fit and feasibility against the institution's criteria.

☐ QL100 Check that questions, sampling, researcher role, collection, analysis and quality criteria are consistent.

☐ QL101 Confirm that all participant material is authentic and that no completed findings are claimed at proposal stage.

☐ QL102 Review terminology, tenses, language, formatting, pagination and supervisor feedback.

☐ QL103 Check institutional authorship, support and AI-disclosure rules; prepare to defend the design and interpretation.

☐ QL104 Resolve every pending applicable item or record an agreed action plan and responsibility.

Methodological resources: SRQR addresses qualitative reporting broadly; COREQ focuses on interviews and focus groups. Use them only where appropriate. Reporting guidelines do not replace methodological judgement.

SRQR qualitative reporting guidance

COREQ interview and focus-group reporting guidance

Review record and Qundeel support

Pending items and proposal page references: _____
Actions, responsible person and target date: _____
Supervisor or reviewer comments: _____

Qundeel Academic Consultancy, also known as Qundeel.com, was established in 2011 and is based in Gujranwala, Punjab, Pakistan. Founder Aamir Iqbal leads online academic guidance, proposal support, methodology and editing services. This checklist is for guidance; scholars retain responsibility for institutional compliance and submission.

PhD proposal guidance: https://qundeel.com/phd-proposal-writing-services/

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