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BUILDING EVIDENCE IN EDUCATION

EVENT REPORT

KIX EMAP Skills-Strengthening Workshop Series: **Qualitative Research**

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IDRC · CRDI

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Network for international policies and cooperation in education and training

KIX EMAP Skills-Strengthening Workshop on Qualitative Research

Ministries, researchers, and implementing partners across the EMAP region increasingly face questions that cannot be answered by quantitative data alone, including questions about stakeholder perspectives, contextual constraints, mechanisms behind observed outcomes, and how to adapt or scale interventions responsibly. The third workshop of the KIX EMAP Skills-Strengthening Workshop Series was held on 28-29 January 2026, in partnership with the Building Evidence in Education (BE²) working group. The workshop centred on qualitative research, which plays a central role in understanding how education policies and programmes actually unfold in diverse contexts. This two-part virtual workshop introduced participants to the BE² Guidance Note on Qualitative Research and provided hands-on practice applying qualitative approaches to real policy and implementation challenges.

The two days were facilitated by Dr Joan DeJaeghere, Author of the BE² Guidance Note on Qualitative Research, and Deborah Greebon, Deputy Lead, BE² Secretariat, in collaboration with the KIX EMAP Hub team. From over 400 applicants, 175 education stakeholders were selected to participate in the workshop. Participants included ministry officials, researchers, program implementers, and other education stakeholders from 29 countries in the EMAP region who commission, design, conduct, or use qualitative research to support policy or program decisions.

The workshop focused on the application of qualitative research to policy and practice questions through short presentations, interactive exercises, breakout discussions, question-and-answer sessions, and analysis of case studies from the EMAP region.

The workshop objectives were to:

- Strengthen skills in formulating clear, feasible qualitative research questions that address real policy and implementation needs;
- Enhance capacity to choose qualitative methods and sampling strategies appropriate to those questions and contexts;
- Deepen understanding of how qualitative data are collected, analysed, interpreted, and distinguished from other forms of evidence;
- Develop practical strategies for designing or commissioning qualitative studies that balance rigour with feasibility and support timely decision-making; and

- Increase confidence in applying qualitative findings to education decisions through hands-on case analysis and discussion of the use and value of qualitative data analysis tools.

Key Takeaways

The training emphasised practical lessons for commissioning, conducting, interpreting, and using qualitative research in education. Drawing on the workshop agenda, case discussions, facilitator notes, and slide content, the main takeaways were:

Start with the decision need, not the method.

Participants were encouraged to begin with a concrete policy or implementation issue and then ask what they would need to see, hear, or understand in order to act. The workshop repeatedly stressed that asking whether qualitative or quantitative research is "better" is the wrong question. The right question is which kind of evidence is needed for the purpose at hand.

Strong qualitative questions are actionable and explanatory.

Good qualitative questions help explain how, why, for whom, and under what conditions something is happening. They are useful for understanding perceptions and behaviour, uncovering processes and relationships, identifying gaps between policy and practice, and surfacing unanticipated influences or outcomes.

Methodology, methods, and sampling should be aligned with purpose.

The workshop highlighted that choices about case studies, participatory approaches, interviews, focus groups, observations, documents, and arts-based or participatory methods should follow the study purpose and context. Methods can be familiar, but their value depends on how they are combined and used to generate richer explanations.

Qualitative sampling is purposive.

Participants were reminded that sample size alone does not determine quality. What matters is whether the sample can generate useful, sufficiently rich data, including variation and disconfirming evidence when needed. Sampling may also be iterative as researchers refine the study and test emerging ideas.

Rigour in qualitative research comes from disciplined design and transparency.

Across both sessions, rigour was framed as the alignment of purpose, questions, methodology, methods, sampling, and analysis. The training also emphasised triangulation, thick description, careful documentation of decisions, and a document trail that shows how findings were developed and interpreted.

Analysis is more than coding and often begins early.

Facilitators stressed that analysis frequently starts during data collection through memos, research notes, and early comparison across cases or participants. Coding is an important step, but it is not the endpoint. Researchers still need to compare patterns, weigh alternative explanations, and explain outcomes.

Different analytical approaches serve different purposes.

The workshop introduced approaches such as process tracing and constant comparative analysis to show how qualitative analysis can explain mechanisms, interacting factors, and differences within and across cases. Participants examined how analysis should align with the original research question and overall study design.

Mixed methods can strengthen explanation and decision-making.

The training presented qualitative and quantitative research as complementary rather than competing. Qualitative evidence can help explain patterns found in quantitative data, clarify why results differ across settings, and identify additional questions that decision-makers should examine.

Rapid qualitative work is possible, but only with disciplined narrowing of scope.

When time or resources are limited, the workshop suggested focusing protocols tightly on the research purpose, narrowing the sample and methods, beginning analysis early, and being realistic about what can be learned in the available timeframe.

Use of findings should be planned from the outset.

Participants were asked to consider the scope and level of the study, which findings could inform policy or practice, how results might be integrated with other studies, and what additional information would still be needed before action. The training underscored that qualitative findings are most useful when they are clearly translated for specific audiences and decision points.

Software and AI can support the work, but they do not replace researcher judgment.

The workshop demystified qualitative software and noted that tools can help organise, retrieve, compare, transcribe, translate, and visualise data. At the same time, researchers remain responsible for interpretation, theory-informed decisions, ethics, data management, and checking the quality of outputs generated with AI-enabled tools.

Frequently Asked Questions (FAQ)

The workshop addressed important questions raised by the participants. A selection of the FAQ is provided below.

Research Concepts & Foundations

What's the difference between approach and methods?

Methods are the specific tools you use to gather data; an approach is the perspective that orients how you approach the whole study, such as whether it is a participatory approach or a case study.

What indicators help us recognise that the study employs a qualitative approach?

Qualitative research questions are designated by how and why kinds of questions.

What assumptions or criteria guide quality qualitative research?

Criteria for quality qualitative research are different from quantitative research because we do not assume a strict laboratory-like setting, nor do we try to control the environment or have control variables. Rather, qualitative research should be credible – presenting truth claims from the data based on the design – the sample and methods; and it should have some theoretical or practical transferability (not generalisability).

What are some budget considerations for qualitative research?

The budget needs to consider key aspects of qualitative research, including time for designing and piloting protocols, translations and transcription, and sufficient time for researchers to undertake coding and analysis.

Mixed Methods & Design

When should we use a mixed methods approach?

Mixed methods may be a desirable approach for many educational policy and practice questions. The key is to identify questions that need different kinds of data and explanations, and to think through how findings from different kinds of data will be integrated to offer stronger explanations. Qualitative findings can offer important explanations for policy even when they are not generalisable to a sampled population.

What are some ways to mix methods and in what sequence?

Mixed methods studies can take many forms, including combining quantitative and qualitative data in a case study, or using a participatory qualitative approach prior to a randomised controlled trial. The sequence and relative weight of methods depend on the questions being asked and what the study is trying to understand and explain.

Sampling, Saturation & Representation

There is a lot of debate on the "sufficient" number of participants selected for qualitative studies. What is sufficient? And how do we know when we have reached saturation?

The sufficiency of the data depends not so much on the number of participants but on the quality of the data to answer the question, and to add to our understanding of the issue. Qualitative researchers sometimes refer to theoretical saturation. Theoretical saturation is not only about the quantity of a code or pattern (and how often it is repeated), but also about the richness of the data to explain the phenomenon or question.

That said, sometimes we are not only searching for patterns and thus, the saturation of data to show these patterns, but also for differences among groups or responses. So maximum variation and criterion sampling can be useful to ensure sufficient variation in the data.

How do we get more representation from those whose participation is more challenging?

Deliberately sampling specific groups of people who are not often included in the research can help ensure their perspective is included. You might also work with communities or organisations to seek access to those you wish to include. That said, be aware that gatekeepers in a community, organisation, or ministry can affect or limit who you have access to. Consider also methods that are more relevant to ensuring their perspectives, for example, methods that allow for children's expressions or ways of knowing and community elders will differ.

Data Collection

How can we design and implement interviews to ensure respondents provide valid and truthful data, especially in contexts where cultural norms, social desirability, or conflict sensitivity may lead participants to give expected or made-up answers?

Usually in qualitative research, we try to achieve trustworthiness in our data rather than an absolute truth. Multiple sources of data can help to ensure trustworthiness by providing multiple data points by which to understand an issue.

In addition, training of those who conduct interviews is important so that they understand how to gain access and develop a relationship with the participants to increase the trustworthiness of the data. Interviewers can also ask a question in different ways to see how respondents answer.

That said, in some contexts, answering questions anonymously might allow for a respondent to be more honest and to not respond in a desirable manner. Consideration should be given to different ways of gathering data and how respondents might provide the data.

What strategies can be used to ensure trustworthy data collection during classroom observations in the presence of multiple distractions and competing classroom activities?

Classrooms are complex environments, as are other organisational spaces (such as meetings). Observations done by an observer in the classroom have some advantages of seeing the multiple interactions in real time and context, but they also can have effects on the environment, and they are difficult to capture the many nuances that are happening.

Using multiple methods can be useful to capture different aspects of a complex environment. This could include video-recording of teachers and students, teacher or student interviews before or after classroom activities, diaries or reflections from teachers or students, and other classroom artefacts.

Is it reliable to conduct interviews online, for example, through Zoom or Telegram?

Interviews, observations and other forms of data can be gathered through online platforms. The quality of the data will depend on many aspects of the relationship between the interviewer or observer and the participants, in terms of how trust is developed, how questions are asked, etc. These interviews also may not provide an understanding of the contextual environment in which the interviewee lives/acts.

Bias, Validity & Trustworthiness

What kinds of bias might occur and how can they be managed or minimised?

Qualitative research recognises that the researcher is the instrument for data gathering in many cases, and also in analysis and interpretation. This is also the case for quantitative types of data; the difference is that qualitative researchers actively reflect on and discuss how their assumptions and biases might affect the questions they ask or how they analyse the data.

So, to avoid confirmatory bias – seeking data to confirm your assumptions – researchers should purposefully look for disconfirming evidence. They might also involve another researcher in the coding and analysis process to see what others see in the data.

Researchers can also employ various techniques to check their interpretations, including asking participants to review their analysis and offer their perspectives on how it captures their responses (member checking), or asking other members of the community or those involved in the research process to review and offer their reflections.

Researchers should always provide sufficient data to illustrate their interpretation, a sort of audit trail to show others how the researcher came to the interpretations.

Artificial Intelligence (AI)

In the context of qualitative research, how has the emergence of AI reshaped research processes, and what are some ethical considerations for using it?

AI is already being used in various software tools/platforms used in qualitative research. For example, AI might be used to transcribe and translate qualitative data. The researcher, however, should always check the transcription by reviewing

the transcript against spoken recordings. They should also consider how the data are stored in these systems and who has access.

AI is also used in analysis software when doing certain coding functions, such as searching and coding for specific terms or content. AI might also be used in creating visuals of data in software, such as NVivo or other software analysis.

The researcher should ensure that the functions being performed by software, whether transcription, coding or visualisation, are based on theoretical and empirically informed decisions that the researcher makes.

Software

Does software help with the actual interpretation of the data, or is its main role just organising and coding?

Software may help with interpretation by illustrating patterns in data, showing comparisons or other visualisations, but the researcher guides the software for showing these data and makes the interpretations from them.

Policy Uptake, Communication & Sustainability

How do we share sensitive findings, whether related to a community or to government officials?

Sensitivity should be given to sharing qualitative data, particularly if it reveals some sensitive issues about people or a group that could result in backlash or retaliation against them. In this case, a researcher should be careful to anonymise data or to present it in ways that illustrate important findings but not personalise them.

Sharing qualitative findings as perspectives that can illuminate some challenges to a policy or practice can help policymakers realise there are possible solutions to problems they might know but don't want to admit or address.

How can we present qualitative findings in a concise format suitable for policymakers?

Qualitative findings can be presented through illustrations, diagrams, and other visualisations that help policymakers review and synthesise evidence quickly.

Qualitative Training Resources

The following resources were compiled for participants as complementary references for planning, conducting, analysing, and communicating qualitative research.

Guidance Note on Qualitative Research:

- BE² Guidance Note on Qualitative Research

Planning for Qualitative Research:

- How conducting qualitative research can help improve development policies — 10 lessons from a study in Malawi. Practical lessons about fieldwork realities and planning.
- Stakeholders Analysis Matrix: Quick Guide
- Tools for bridging research and policy: the RAPID Context, Evidence, Links Framework. The RAPID framework can be used as a conceptual framework to help researchers and policy entrepreneurs understand the role that evidence-based research plays, amongst other issues, in influencing policy.
- Research Ethics: A practical guide
- Ethical AI for Qualitative Data Synthesis: Balancing Promise and Prudence

Data Collection:

- Qualitative Data Collection Methods Explained. This episode breaks down the four core qualitative data collection methods — interviews, focus groups, observation, and document analysis. Learn when to use each method, how they work, and how to choose the right one for your study.
- Qualitative Data Collection Methods: What it is + Process
- Key informant interview tool
- Qualitative Guide to run Focus Group Discussions (FGD) with communities and local authorities on Early Warning Systems

Data Analysis:

- Qualitative Data Analysis: Step-by-Step Guide (Manual vs. Automatic). Qualitative data analysis is a process of structuring & interpreting data to understand what it represents. Learn the qualitative analysis process in 5 steps.

- The Trust Framework. The Internews Trust Framework offers a perspective to gauge the presence of trust and, importantly, to understand why certain sources of information might be more or less trusted. This framework consists of four key elements of trust, each comprising three components. This enables us to analyse, monitor, plan, and assess with the goal of fostering, enhancing, or nurturing trust.
- Framework Matrices. A framework matrix is a way of summarising and analysing qualitative data in a table of rows and columns.
- Process tracing. This video talks through when and how to use process tracing as an analysis method.

Dissemination:

- Policy brief template: how to write an effective policy brief
- Messaging Matrix 'How to Use' - Quick Guide. Step-by-step Guide to use the messaging matrix template developed by UNHCR MENA regional protection service to support tailoring messages to various audience needs and preferences and incorporate key considerations in outreach planning.

Workshop recordings:

- Day 1 recording (English)
- Day 2 recording (English)
- Day 1 recording (Arabic)
- Day 2 recording (Arabic)
- Day 1 recording (Russian)
- Day 2 recording (Russian)

Additional resources:

- Building Evidence in Education (BE2) website