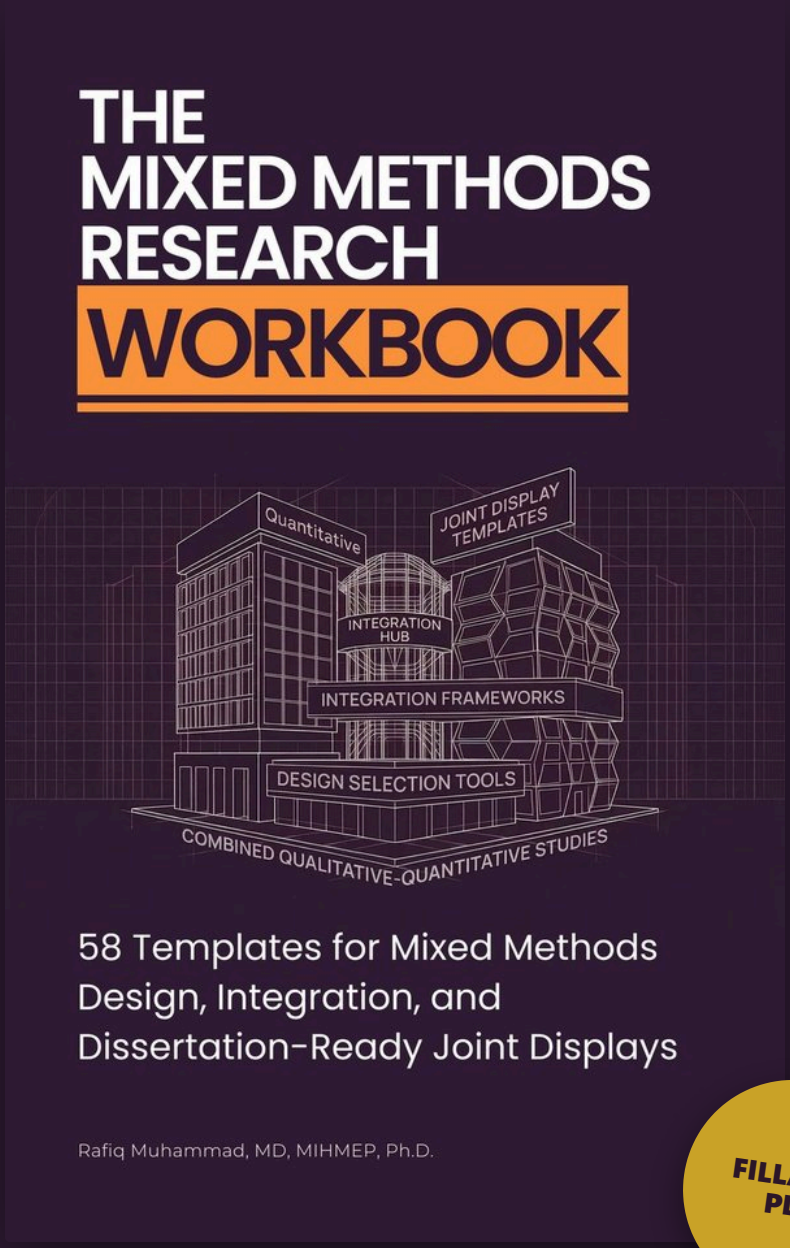
FILLABLE TEMPLATE KIT



The Mixed Methods Research Kit

58 fillable templates · US Letter & A4 · type, save, print

The companion kit to the workbook shown above. It contains the templates only. The chapters and the completed examples are in the book.

How to use this kit

This kit contains every fill-in template from *The Mixed Methods Research Workbook*, one per page, in the order you will use them. Each page tells you in a few lines how to fill it in.

> **On screen:** open the PDF in Adobe Acrobat Reader (free), Microsoft Edge, Google Chrome or macOS Preview. Click any white box and type; boxes grow to more lines where answers are long. Tick boxes with a click. **Save often** (Ctrl/Cmd + S) — your answers stay in the file.

> **On paper:** print any page; every box is sized for handwriting.

Working with a supervisor? Each template ends with a sign-off line, so you can bring pages to meetings as they are done.

First time doing this? The kit gives you the tools; the workbook teaches the method. *The Mixed Methods Research Workbook* explains every template and shows a completed example of each one, built around a single study from start to finish.

The workbook, with a completed example of every template: https://www.gradsummit.com/workbooks/mixed-methods-research-workbook/

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Template map

58 templates in the order the workbook uses them. Click a row to jump to it; tick **Done** as you finish each one.

#	Template	Page	Done
Chapter 1 · PHILOSOPHICAL FOUNDATIONS & PARADIGM POSITIONING			
1.1	THE PARADIGM POSITIONING WORKSHEET	7	☐
1.2	THE "WHY MIXED METHODS?" JUSTIFICATION BUILDER	8	☐
1.3	MIXED METHODS TERMINOLOGY QUICK-REFERENCE & SELF-TEST	9	☐
1.4	RESEARCH PROBLEM → METHODOLOGY ALIGNMENT DIAGNOSTIC	13	☐
Chapter 2 · MIXED METHODS RESEARCH QUESTION ARCHITECTURE			
2.1	MIXED METHODS RESEARCH QUESTION BUILDER	16	☐
2.2	QUESTION → DESIGN ALIGNMENT MATRIX	18	☐
2.3	THE "INTEGRATION QUESTION" DRAFTING TOOL	19	☐
2.4	PURPOSE STATEMENT BUILDER FOR MIXED METHODS	21	☐
Chapter 3 · THE DESIGN SELECTION DIAGNOSTIC			
3.1	MIXED METHODS DESIGN DECISION TREE	22	☐
3.2	DESIGN COMPARISON MATRIX	24	☐
3.3	DESIGN SELECTION JUSTIFICATION STATEMENT BUILDER	26	☐
3.4	THE "IS THIS REALLY MIXED METHODS?" SELF-AUDIT	28	☐
3.5	DESIGN SELECTION SUMMARY CARD	30	☐
Chapter 4 · MIXED METHODS NOTATION & VISUAL DESIGN MAPPING			
4.1	MIXED METHODS NOTATION WORKSHEET	32	☐
4.2	PROCEDURAL DIAGRAM BUILDER	35	☐
4.3	TIMELINE & MIXING POINT PLANNER	36	☐
4.4	DESIGN MAP ONE-PAGE SUMMARY	37	☐
Chapter 5 · CONVERGENT DESIGN WORKSHOP			
5.1	CONVERGENT DESIGN STRAND PLANNING WORKSHEET — QUANTITATIVE STRAND	38	☐
5.2	CONVERGENT DESIGN STRAND PLANNING WORKSHEET — QUALITATIVE STRAND	40	☐
5.3	CONVERGENT DESIGN MERGING STRATEGY SELECTOR	42	☐
5.4	CONVERGENT DESIGN JOINT DISPLAY PLANNER (PRE-FORMATTED)	44	☐
5.5	CONVERGENT DESIGN META-INFERENCE WORKSHEET	46	☐
Chapter 6 · EXPLANATORY SEQUENTIAL DESIGN WORKSHOP			
6.1	EXPLANATORY SEQUENTIAL PHASE 1 PLANNER	47	☐
6.2	THE CONNECTION POINT DESIGN TOOL	49	☐
6.3	EXPLANATORY SEQUENTIAL PHASE 2 PLANNER	51	☐
6.4	EXPLANATORY SEQUENTIAL JOINT DISPLAY BUILDER	53	☐
Chapter 7 · EXPLORATORY SEQUENTIAL DESIGN WORKSHOP			

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CHAPTER 3 · THE DESIGN SELECTION DIAGNOSTIC

3.2 DESIGN COMPARISON MATRIX

Estimated time: 20–30 minutes

Completed example: Template 3.2 in The Mixed Methods Research Workbook.

DIMENSION	CONVERGENT QUAL + QUAN	EXPLANATORY SEQUENTIAL QUAN → qual	EXPLORATORY SEQUENTIAL QUAL → quan	EMBEDDED / ADVANCED QUAN[qual] / Multiphase	HOW THIS APPLIES TO MY STUDY (Complete for ALL four designs)
Timing of Strands	Concurrent — both collected simultaneously	Sequential — QUAN first, then qual	Sequential — QUAL first, then quan	Embedded: one strand nested within larger framework; Multiphase: multiple sequential/concurrent phases	Does this apply? ☐ Yes ☐ No ☐ Partially
Priority / Weighting	Typically equal (QUAL + QUAN). Can be weighted toward one strand.	QUAN dominant (uppercase). qual supplementary (lowercase).	QUAL dominant in Phase 1 (uppercase). quan supplementary in Phase 2.	Primary framework strand is dominant. Embedded strand is supplementary.	Does this apply? ☐ Yes ☐ No ☐ Partially
Integration Strategy	Merging — findings brought together for side-by-side comparison or data transformation at interpretation stage.	Connecting — Phase 1 results directly determine Phase 2 design, participant selection, and interview questions.	Building — Phase 1 findings are translated into quantitative elements (items, variables, interventions).	Embedding — supplementary strand serves the purpose of the primary framework.	Does this apply? ☐ Yes ☐ No ☐ Partially
Typical Research Question Language	"In what ways do qualitative findings corroborate, extend, or contradict quantitative findings about [phenomenon]?"	"How do qualitative accounts explain [specific quantitative finding]?"	"To what extent do [qualitative-derived constructs] manifest as measurable outcomes in [larger population]?"	"How does [embedded strand] illuminate the mechanism/experience within [primary framework]?"	Does this apply? ☐ Yes ☐ No ☐ Partially
Primary Strength	Breadth + depth of the same phenomenon. Triangulation capacity. Efficient data collection timeline.	Explanatory depth. Follow-up is targeted and efficient. Phase 2 participant selection is purposive and justified.	Instrument validity rooted in participant language. Ensures quantitative measures capture the right constructs.	Flexibility. Can address complex, multi-layered problems. Supports large-scale program evaluation and intervention research.	Does this apply? ☐ Yes ☐ No ☐ Partially

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CHAPTER 5 · CONVERGENT DESIGN WORKSHOP

5.3 CONVERGENT DESIGN MERGING STRATEGY SELECTOR

Estimated time: 30–45 minutes

Completed example: Template 5.3 in The Mixed Methods Research Workbook.

STRATEGY	WHAT IT MEANS	BEST USED WHEN	INTEGRATION PRODUCT
Side-by-Side Comparison	Qualitative themes and quantitative statistics are presented in parallel columns for direct comparison. The comparison reveals confirmation, expansion, or discordance.	Your QUAL and QUAN strands address the same research topics from different angles. You have clearly comparable units (e.g., themes map to survey subscales). Most common convergent strategy.	Statistics-by-Themes Joint Display (Template 10.1). Findings chapter presents the merged table. Discussion addresses what the comparison reveals.
Data Transformation (Quantitizing)	Qualitative data (themes, categories, or codes) are converted into numeric form — frequency counts, presence/absence scores, or Likert-type ratings — to enable direct statistical comparison with quantitative data.	You want to statistically compare QUAL and QUAN patterns. You have a large enough qualitative dataset to make frequency counts meaningful. Quantitizing does not diminish the qualitative strand — it creates a new data form for a specific comparison purpose.	Data Transformation Joint Display (Template 10.7). New variable(s) from transformed QUAL data may be entered into QUAN analysis as predictors or outcomes.
Data Transformation (Qualitizing)	Quantitative data (scores, group memberships, regression profiles) are converted into qualitative descriptors — narrative profiles, case typologies — to enable interpretation alongside qualitative accounts.	You want to create participant profiles that combine both data types. Your quantitative scores need contextual narrative to be interpretable. Particularly powerful for case-based or person-centred designs.	Typology Development Display (Template 10.6) or Case-by-Case Cross-Comparison Display (Template 10.2).

YOUR TURN — Merging Strategy Documentation

COMPONENT	YOUR MERGING STRATEGY — Complete all fields
PRIMARY STRATEGY SELECTED (Side-by-Side / Quantitizing / Qualitizing) Circle one, or indicate primary + secondary. Write your rationale.	
DIMENSIONS FOR COMPARISON What specific QUAN results will be compared to what specific QUAL themes or findings? List each comparison pair.	

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End of the sample

This sample shows 2 templates: 3.2 DESIGN COMPARISON MATRIX; 5.3 CONVERGENT DESIGN MERGING STRATEGY SELECTOR.

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You can buy the full kit on the page where you downloaded this sample.

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