

## SELF-CHECKLIST: ERF APPLICATION & RESEARCH DESIGN

This self-checklist is intended to help researchers who are preparing grant proposals to do a quick, self-evaluation before submission. The focus is on ensuring that the research methodology is sufficiently developed and clearly presented.

This checklist is purely for your own use. You do not have to submit it as part of your proposal package.

A.	Unit of investigation (sites, groups, participants, events, or another units)	√ if 'yes'	Add comments if desired
1.	Are the units of investigation clearly stated?	<input type="checkbox"/>	
2.	Is the selection of the unit of investigation explained and justified?	<input type="checkbox"/>	
3.	Are the inclusion/ exclusion criteria for participants clearly stated?	<input type="checkbox"/>	
4.	Have you justified the number of participants in relation to your research methods (e.g. power analysis for quantitative studies or reference to other qualitative studies for qualitative analyses)?	<input type="checkbox"/>	
Be sure to consider whether you have enough participants but also whether you are being overly optimistic (is the number realistic) and whether the stated sample size is necessary (avoiding oversubscription).			
5.	Are there any special ethical considerations for the units of investigation? If yes, have you stated how will you address the ethical considerations?	<input type="checkbox"/>	
6.	For qualitative projects: Have you explicitly stated the role of the researcher in the project, especially in relation to the units of investigation (e.g. participant/non-participant observation)?	<input type="checkbox"/>	
<b>B. Instruments</b>			
1.	Have you listed and described the instruments necessary used to carry out the study? Have you succinctly justified the selection of these instruments (as opposed to other options)?	<input type="checkbox"/>	
2.	Has the validity of the instruments been tested?  (a) If yes, when and where? If no, how might that impact the study?	<input type="checkbox"/>	
<b>C. Data Collection</b>			
1.	Are data collection procedures clearly and completely described?	<input type="checkbox"/>	
2.	Is the procedural sequence for data collection clearly stated?	<input type="checkbox"/>	

3.	Would it be easier to show your data collection procedures with a graphic or is this best described in prose?	<input type="checkbox"/>	
<b>D.</b>	<b>Data Analysis</b>		
1.	Are data analysis procedures clearly and completely described?	<input type="checkbox"/>	
2.	Is the procedural sequence for data analysis clearly stated?	<input type="checkbox"/>	
3.	Do the analysis procedures: make use of all data collected? If so, how? lead to answers to your research questions?	<input type="checkbox"/>	
4.	Would it be easier to show your data analysis procedures in a table? See example below	<input type="checkbox"/>	

Example			
Research Question	Data Collection (instrument/ procedure)	Data Analysis	Comment/ Explanation (if needed)

5.	Have you explained how reliability and validity in analysis will be addressed?	<input type="checkbox"/>	
6.	Does the proposed study methodology replicate other studies, or is it based on methodology from prior studies, or is there an innovation in the research methodology?  If yes, have you explicitly stated that it is a replication? If not, have you stated what your methodology is based on (e.g. prior studies)?	<input type="checkbox"/>	
7.	For quantitative studies, check if (a) the scales or measurement for your data explicitly stated (b) the statistical procedures are stated and justified (c) the types of analyses proposed are appropriate for your data and research questions  Have you addressed possible alternatives?	<input type="checkbox"/>	

8.	For qualitative studies: (a) How will the data be analyzed and how can this analysis be justified?	<input type="checkbox"/>	
Note: Naming of a 'method' (e.g. 'thematic analysis', 'discourse analysis') is insufficient as a description and justification of qualitative data analysis			
9.	For studies involving transcription: (a) Are there any special formats and conventions for your transcription? (b) Have you explained how transcription and/or the convention of transcription related to your conceptual framework and plans for data analysis? (c) Can AI-tools be used to aid in transcription in a secured manner? If yes, what tools will be used?	<input type="checkbox"/>	
<b>E.</b>	<b>Use of Technology</b>		
1.	Have you considered ways in which technology might support your data collection/analysis, reduce costs, enhance efficiency?	<input type="checkbox"/>	
<b>F.</b>	<b>Treatment of Data</b>		
1.	Will the data be cleaned? If yes, have you explained why and how?	<input type="checkbox"/>	
2.	Have you stated how/where data will data be stored during the data? Have you explained how will data be shared among the research team? Have you considered how this might impact your budget?	<input type="checkbox"/>	
Note: Consider the implications of data storage and sharing for research ethics and PDPA.			
3.	Have you stated how data will be archived after the study?  Have you considered the long-term implications of your data archiving plans for:  (a) Future use (b) Secondary use (c) Data Sharing  Have you considered how this might impact ethical considerations?	<input type="checkbox"/>	
<b>G.</b>	<b>Generalizability</b>		
1.	To what extent will the findings be generalizable?		
2.	What are the situations in which the findings have applications, implications or practical consequences and why is this plausible?		
3.	What is the potential, if any, of scalability?		