

Overall Recommendations

❖ For applicants

- Make sure that all parts of the application from the broader philosophical perspectives to the methods of data collection are consistent.
- Use the Review Criteria Checklist to be responsive to the needs of the reviewers.
- Provide a clear rationale for the use of mixed methods based on the study goals, questions, and aims.
- Take mixed methods seriously in the planning of research to improve the quality and utility of the research.
- Understand the benefit/choice of explicitly choosing to identify the research as mixed methods.
- Make clear the innovative nature of the work being proposed, such as the way mixed methods is used and addressed.
- Participate in formal training opportunities (e.g., courses, conferences, workshops, journals, special issues, article and book readings) to learn about mixed methods.
- Integrate an awareness of formal mixed methods research considerations within the application.
- Take time to assemble a successful mixed methods team, not simply add people to fill methodological gaps. The group needs to meet regularly during the design phase and throughout the process.
- Describe the individuals on projects that hold qualitative expertise in addition to quantitative and mixed methods expertise.

❖ For reviewers

- Look for evidence of ongoing collaboration and team process building in the biographical statements or publication records of applicants.
- Use the Review Criteria Checklist as a guide for assessing the quality of the planned use of mixed methods research in applications.
- Look for evidence of awareness/knowledge of mixed methods.
- Refer to the mixed methods quality checklists beyond these “best practices” for further information.
- Look for applications that fail to use mixed methods when they should have to best address the identified research problem.
- Be fair and constructive in comments, recognizing that mixed methods is a new, innovative methodology.
- Add information into background profiles about mixed methods expertise.
- Recognize that the application cannot educate everyone and be careful to use criteria that are appropriate for the content and methodological aspects of the application.

❖ For NIH stakeholders

- Consider developing/updating the NIH guidelines for qualitative research for applicants and reviewers.
- Hold a meeting at NIH with presentations by mixed methods experts and funded researchers to reach those less familiar with mixed methods.
- Widely disseminate these “best practices” through journals, conferences, and other outlets.
- Work for developing criteria for the quality and the presentation of mixed methods research along the example of the CONSORT guidelines.
- Where appropriate, explicitly specify the needs for mixed methods approaches in FOAs.
- Ensure that study section membership includes a combination of qualitative, quantitative, and mixed methods expertise.
- Seek volunteers to review mixed methods applications for NIH.

