

## Experience of First-Time Qualitative Researcher in PhD Study: Piloting for Interview Guide

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Cite this paper as: Aida Ahmad Suhiemat (2025) Experience of First-Time Qualitative Researcher in PhD Study: Piloting for Interview Guide *Journal of Neonatal Surgery*, 14 (10s), 1071-1077.

PUBLISHED 2025-03-12

### ABSTRACT

This methodological article presents the author experience with piloting of interview guide from the perception of a student researcher and from the perception of a research supervisor guiding the student researcher toward completing a PhD qualitative thesis investigating the experience of school age children during COVID-19 pandemic in Jordan from their perspectives. When investigating the lived experience of humans, semi-structured interview is recommended as an appropriate technique for data collection to understand their experiences. For novice researchers, it might be difficult to accomplish interview satisfactorily. Therefore, piloting of interview is a useful step in the qualitative research project because it may highlight important faults and provides a chance to correct these faults before conducting the main study.

This paper discusses the importance of PS mainly in qualitative researches rather than quantitative. Then the article discusses the process of preparation for the PS including: ethical approval, preparation of interview guide, and the revision of interview guide by experts. After that, the article discusses the piloting of the interview guide, modifications made on the interview guide for the main study depending on the result of the pilot study. Professional reflection of the novice researcher on the experience with the pilot study of interview guide is discussed and the researchers recommend PSs for novice and expert researcher. Also, it is important to focus on the scientific role of researchers to report pilot studies because of limited attention in the literatures to publish pilot studies that enhance exchange of the researchers' experiences with pilot studies in qualitative researches.

**Keywords:** Qualitative, Pilot Study, interview, corona, COVID-19

### 1. INTRODUCTION

Pilot study (PS) is a small-scale research project conducted before the final full-scale study (Ismail, et. al., 2018). Numerous literatures propose the importance of PS for the research and for the researchers, PS afford a guide for the main research project as it assists to identify any methodological problem. So, the researchers can modify their plan to achieve their objectives of the proposal study (Shakir & Rahman, 2022; Malmqvist et. al. 2019; Ismail, et. al., 2018; Kim, 2010). (Clavia, 2019 as cited in Peterson 2023) depending on several studies and literatures, précised the efficacy of PSs in qualitative researches as: (1) Refining the instrument, (2) Assessing recruitment feasibility, (3) Enhancing research protocols, (4) Improving data collection, (5) Developing researcher skills, and (6) Securing better funding opportunity. In this sense, Ismail, et. al., (2018) stress that PSs are very useful for both novice and expert qualitative researchers since they discover a different interventions or advanced approaches.

PS directs the researchers, particularly the novice to sharpen methodological issues that enhance understanding the participant's experience. Furthermore, the researcher will be more knowledgeable and arranged to face the possible challenges that may arise during the process of data collection, analysis and interpretation in the main study (Malmqvist et. al. 2019). As the experience of participants investigation required a direct interaction, PS assist the novice researcher to appraise their performance as a qualitative researcher mainly capability and accuracy (Malmqvist et. al. 2019; Aziz & Khan, 2020).

Considerable literatures recommend qualitative inquiry to investigate the human's experience that couldn't be measured quantitatively (Teti, et al. 2020; Percy, et al, 2015; Creswell, 2013). Qualitative research is important beside the traditional quantitative research, given the fact that qualitative approach focus not just on "what" but on "how" (Teti, et al. 2020). Leach, et al. (2020) endorse using of qualitative method to explore the plurality of experience and the variety of perspectives necessary to understand fully the COVID-19 pandemic. As recommended by Teti, et al. (2020) qualitative

method play vital role to understand epidemic as COVID-19; as it develops and lessons to bring to tolerate on future epidemics and how to effectively cope with them. Qualitative phenomenological descriptive design used as this phenomenon studied for the first time among school age children in Jordan,

Interview is commonly admitted by qualitative researchers as an appropriate technique for data collection to understand the lived experience of humans (Malmqvist, et al., 2019; Percy, et al., 2015; Jacob & Furgerson, 2012). Semi-structured interview acknowledged as an appropriate technique in qualitative research to gain insight of participants who experiencing a phenomenon (Barrett & Twycross, 2018; Ismail, et. al., 2018). Importantly, interview questions are conceded as the heart of the interviewing process. In this sense, piloting for interviews can be used to evaluate interviews' questions and to train qualitative researchers and to enrich credibility of the qualitative research (Dikko, 2016).

As Muresherwa and C.Jita, (2022) advocate, researchers have a moral and scientific role to share methodological matters evolving from studies aimed to grow and build a scientific knowledge. Despite that the PSs frequently conducted to evaluate effectiveness of proposed instrument to be used in qualitative research, they have limited attention in the literatures discussing empirical finding (Malmqvist, et al., 2019; Kim, 2010). PSs are under-reported, under-utilized, and under-discussed in the literatures, additionally, scanty guidelines on how to conduct a PS in qualitative research are available in the literatures (Shakir & Rahman, 2022; Aziz & Khan, 2020 ; Malmqvist, et al., 2019), based on those scholars finding and depending on their recommendation, this methodological article presents the authors' experience with piloting of interview guide from the perception of a student researcher and from the perception of a research supervisor guiding the student researcher toward completing a PhD qualitative thesis investigating the experience of school age children during COVID-19 pandemic in Jordan from their perspectives. As recommended by Muresherwa and C.Jita, (2022), the authors report their piloting the interview guide as an example of educational research involving student researcher's experience

The structure of this article is as follows: the first section discuss the importance of PS mainly in qualitative researches rather than quantitative. Also, it fuscous on the scientific role of researchers to report PSs and build a scientific knowledge because of limited attention in the literatures to discuss the researchers' experiences with PSs in qualitative researches. It followed by brief background of the main study conducted for PhD project that this article is grounded. Then the article discusses the process of preparation for the PS including: ethical approval, preparation of interview guide, and the revision of interview guide by experts. The following three sections present: piloting of interview guide; modifications of the interview guide for the main study and the reasons of changes; professional reflection of the novice researcher ; and the final section conclude and recommend PSs for novice and expert researcher.

## 2. BACKGROUND OF THE STUDY

COVID-19 is associated with Severe Acute Respiratory Syndrome Coronavirus (SARS-CoV-2), the first reported case of COVID-19 was in Wuhan city in China, in December 2019 and then spread across the word (Bellino, et al. 2020). According to the report of the Chinese Center for Disease Control and Prevention, only 2% of the cases reported as of February 11, 2020 in China were in individuals aged less than 19 years (Bellino, et al. 2020). A numerous literatures conclude that COVID-19 in pediatric were asymptomatic, and the reported symptoms includes: dry cough, general malaise, fever, tiredness, sore throat, headache, muscle pain, dyspnea, pneumonia, tachypnea, acute respiratory syndrome, and some intestinal tract symptoms such as vomiting and diarrhea (Bellino, et al. 2020; Iannarella, et al. 2020; Mantovani, et al 2020; Tang et al. 2020).

The negative social and economic impacts of COVID-19 are becoming more visible, the (9% ) additional percentage of poverty may lead to long terms negative impacts on children's' health development. These negative effects including immunization coverage, primary health care services and nutritional services (UNICEF b, 2020).. Related to education in all countries in the Middle East and North Africa Region, the report estimate 110 million children, adolescent and young people were out of school. Ministries of Education have at least one on-line platform to allow children to learn at home; while the access to on-line education is not always free and these platforms haven't a sign language translation or any other method for disabled children (UNICEF b, 2020). In Canada, Moore, et al., (2020) conduct a national online survey, they found that 48% of children had lower physical activity level, and less outside time, higher sedentary behaviors including leisure screen time and more sleep during COVID-19 lockdown

Based on searching the national, regional and international literature related to the impact of COVID-19 on children there was no study aimed to explore the experience of school age children during COVID-19 pandemic. The researchers hope that, this study will fill this gap by utilizing a qualitative phenomenological approach which will provide an in-depth view of the issue within its social context that may enhance generation of nursing research contribute to nursing knowledge.

### Preparation for the Pilot Study

The PhD thesis for which this PS conducted is titled "The lived experience of school-age children during coronavirus disease-2019 pandemic in Jordan: A qualitative study". It is a descriptive phenomenological qualitative study targets to catch the exclusive characteristics of the phenomenon earlier than the researcher's view entering this phenomenon, this was referred by Husserl to what he called as phenomenological attitude of the phenomenon (Christensen, et al. 2017). According to

Husserlian instructions and in order to get this phenomenological attitude, this PS considered as operationalized these instructions through participants interviewing and interviews recording to formulate the meanings of experience of school age children during COVID-19 pandemic. This PS was conducted to explore the viability of the interview guide, the researcher's interview technique, and the researcher's skills of transcription and management of data.

The researcher obtained the Institutional Research Board (IRB) prior to enrollment of participants in the study. Ethical approval sought from the Scientific and Ethical Research Committees at School of Nursing; the University of Jordan. Thankfully, permission from the relevant authorities in the Jordanian Ministry Of Education (MOE) obtained as the participants identified from the records of the MOE. Additionally, the researcher aware of the sensitivity of the issues of children's experience during COVID-19 pandemic, and potential emotional involvement associated with conversations about these issues. Therefore, the researcher follows strategies to preserve ethical rights of participants and to manage any potential emotional distress. During the interview the researcher, the child and the parents use the universal precautions (e.g. face mask, hand hygiene, social distances) to prevent transmission COVID-19.

### **Preparing of Interview Guide**

Semi-structured interview is highly effective in extracting the participants' data in an organized and complete manner and keeps the interview and participants' responses within the track of study. Also, semi-structured interview offers the researcher with flexibility in changing the direction and phrasing the questions depending on the participants' responses (Barrett & Twycross, 2018). Interview guide is generated by the researcher based on the previous literatures ((Jacob & Furgerson, 2012) and expert's consultation to simplify the dialogue and to keep the discussion inside the track of study.

Interview guide was prepared in English, translation into Arabic performed by professional translator, to improve trustworthiness, and back-translation was done to check the accuracy of translation. Data were collected in Arabic language as the native of Jordanians participants. One-to-one semi-structured interviews planned to collect data. The period located for piloting of interview guide was two weeks (15-30 of July 2021), and the time located for each interview was (60 minutes). The interviews were guided by 6 central open-ended questions written in simple words without using any jargon terms, and moving through the general-to-specific form. The researcher tries to include essential questions to explore the phenomenon (Dikko, 2016), and to ensure that the interview questions line up with the research questions that raise the efficiency of them (Castillo-Montoya, 2016).. Probing open-ended sub-questions used to investigate the changes in lifestyle of the school children during COVID-19 pandemic concerning their experience with online education, eating habits social distance and sleeping habits during COVID-19 pandemic and lockdown, and the child emotional and behavioral experience.

### **Revising of Initial Interview Guide by Experts**

To improve validity of the data collection instrument, and before implementing the interview guide in the main study, it is important to check any concern or inadequacy to make the needed modification. Therefore, before starting of data collection, the interview guide of this PS was reviewed by the PhD proposal review committee in the University of Jordan, where the study took place; this committee involves three experts from the phenomenological inquiry and nursing field. Interview guide send individually for each expert, so, the interview questions reviewed for: structure, order, length, writing style (language and wording), relevance and phenomenological nature.

The reviewers were gratified with quality of questions in term of structure, phrasing, and relevance to research questions. At this point, one central questions was added, beginning of all questions were modified because of leading questions, additionally, rephrasing and adding of some probing questions for further clarification and deep understanding of school age experience. Following of this initial review, the questions composed of six questions were all of the expert's recommendations for change integrated into the last draft of the interview questions to be used in the PS – see (Table 1). Expert's feedback was greatly supportive to improve the interview guide since the PhD. student had a hint of how she can improve the questions to make them accessible and explicable for the participants.

### **Piloting of Interview Guide**

Semi-structured, one-to-one interview used to collect data from two school age children. The plan for this study was to collect data digitally using the Zoom platform; but because of the participants' mothers feedback about the difficulty of internet availability, the plan was changed to collect data by face-to-face interview while using social distance and protective measures. The two interviews conducted in Arabic and video-recorded by the researcher using interview guide. The questions in the interview guide were not phrased closely as they written, but the general perceptions in each question were followed.

To ensure that the researchers didn't have any personal information of participants before their decision to participate in this study, school children and their parents were invited for participation through calling them (phone number (available at the schools), then invitation letter and interview questions were sent for the participant's parents who agree to share their experience by What Sapp to explain the purpose and nature of interview, who will conduct the interview. Phone number and E-mail of researcher illustrated at the end of invitation letter for more clarification or question. In addition, clearance that the participants can stop the interview at any time without any explanation is clarified in the invitation letter.

Three days were given to the potential participants for further clarifications or questions before the second researcher's contact to answer any question and to arrange the date, time and place of the interview. On the agreed day of interview, the researcher confirmed –by phone- the time and place of interview. Jacob and Furgerson, (2012) recommend that the place should be comfortable for the participants, quiet and free of distractions to facilitate data collection and recording; therefore, participants were allowed to choose the place of interview. In this pilot location of interview agreed with parent and child, the two interviews were conducted at the participants' home; their choice of location.

The two participants for this PS were recruited as the same of the main study through purposive selection from the student's registration in the primary and middle governmental schools. Inclusion criteria of selecting the participants were: (1) school age child (8-12year); (2) the ability to communicate orally, and (3) non-sick child (not complaining of any chronic or acute disease including Coronavirus). The 1<sup>st</sup> participant coded as (F.5.1) as a female student, at the 5<sup>th</sup> grade, and the 1<sup>st</sup> interviewee; she was eleven years old. The other participant was coded as (M. 6.2) as a male student, at the 6<sup>th</sup> grade, and the 2<sup>nd</sup> interviewee; he was twelfth years old.

At the end of each interview, the researcher reminds the participating child and parents, about the need for another contact with them via telephone call to discuss the findings and to make sure that the findings reflect their experiences. When completing of the interview, the researcher gifts each child a set of colored pencils, as an expression of thankfulness for her/his participation.

### Modification of Interview Guide

The initial interview questions and the changes made to them after conducting this PS illustrated below in (Table 1). In the interview guide, the questions were followed in sequence, as the questions had been organized based on logical order. However, certain questions were omitted from the interview guide, others were reworded, and one final question was added to give an opportunity for the participants to provide any additional information that wasn't exist in the interview guide. The reasons for modifications of questions are clarified following (Table 1). Draft of interview guide after modifications had been approved for the main study by the research supervisor.

**Table 1: Initial Interview Guide**

<p>Thank you for meeting with me. You have the right to refuse to participate in this study or to withdraw at any time without any explanation.</p> <p>Turn on video recorder</p> <p>I have a set of questions to guide our discussion:</p> <p>1. Tell me about your experience of being a school child during COVID-19 pandemic, particularly during lockdown period</p> <p>What is your perception of lockdown?</p> <p>How you can describe the difficulties you faced?</p> <p><b>Changes: Q1 is reworded and the sentence (particularly during lockdown period) and probing question (a) moved to Q3 – see details below the table.</b></p> <p>2. .Tell me, what do you know about the protective preparation against COVID-19?</p> <p>What are the preventive measures of COVID-19?</p> <p>What are your sources of information?</p> <p><b>Changes: Q2 is followed by a new probing question (c) – see details below the table.</b></p> <p>3. Tell me, what is the influence of COVID-19 lockdown on your daily life</p> <p>What are the physical, psychosocial, and mental influences of COVID-19 on your life as a child?</p> <p>What is the impact of socioeconomic situation during COVID-19 on your life?</p> <p>What are the factors that influence your experience as a school age child during COVID-19 lockdown</p> <p>What are the positive and the negative influences of COVID-19 pandemic on your life?</p> <p>-What are the things that stressing you?</p> <p><b>Changes: in Q3, the probing question (a), (b) and (d) were moved to Q1 - see details below the table.</b></p> <p>4. What are your needs in the lockdown period because of COVID-19 pandemic</p>
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What are the needs that you loss because of COVID-19 lockdown

What is type of support, if any, did you receive? If you receive support, who provided that support?

**Changes: Q4 is deleted without replacement, and probing question (b) is moved down to be a probing question in Q 6 - see details below the table.**

5. Tell me, what you recommend to improve what you feel during the COVID-19 pandemic and lockdown in the future .

What are the main elements that should be considered for future preparedness to improve school age children experience to deal with pandemic crisis and lockdown

6. Tell me, what you miss during COVID-19 lockdown and what you look forward to do when everything went back to normal?

In your opinion, what are the influences of lockdown during COVID-19 pandemic on the basic developmental, social, and cognitive needs of school age children?

In your opinion, what are the recommendations for researchers, decision makers, disaster managers, and policy creators to improve the emergency preparedness in the future, and considering the non-pathological influence of pandemic lockdown on school age children ?

**Changes: Q6 is reworded by deleting the sentence "what you miss during COVID-19 lockdown" - see details below the table.**

Thank you again for accepting to being interviewed and to present your experience with me.

**Question 7: Q7 is added - see details below the table.**

Turn off Turn on video recorder

#### Question 1

Question 1 was reworded and the sentence (particularly during lockdown period) and the probing question (a) moved to Q3 to be: "Tell me about your experience of being a school child during COVID-19 pandemic" with one probing question (b): "How you can describe the difficulties you faced?", the cause of change that the concept in Q1 is about COVID -19, while the concept in Q3 is about the lockdown period.

#### Question 2

The question was changed to be followed by a new probing question (c) asking to give more details about the experience of participant with the protective preparation against COVID-19. The probing question was "how was your experience with the protective preparation against COVID-19?".

#### Question 3

In Q3, the probing question (a), (b) and (d) were moved to Q1 due to their connection with COVID-19 pandemic specifically to obtain more information about the physical, social, emotional, and educational impact of COVID-19 pandemic on the life of school age children.

#### Question 4

Question 4 was deleted without replacement since the information related to the topic of the question was included in the previous three questions. Probing question (b) is moved down to be a probing question in Q 6. The reason for this change is that receiving of support is an important element may affect the participant's opinion related to what he look forward to do when everything went back to normal. This probing question could provide Q6 to allow the participant to express their experience.

#### Question 6

This question is reworded by deleting the sentence "what you miss during COVID-19 lockdown" that because this change allowed participants to express their feeling and opinion broadly without any restrictions to COVID-19 or to lockdown.

#### Question 7

Question 7 was added as "what do you want to add about any information not elucidated in this interview?". This change to give a chance for participants to add any missed data could enrich the outcome of interviews.

### 3. REFLECTION

Experiencing of the pilot study to understand qualitative research and develop the personal ability and skills could lead to



significant development in the main study and confidence of data collection method that could be used with face-to-face interviewing in qualitative research. This PS of qualitative research found useful and efficient since it help me to refining the interview guide, and assessing feasibility of recruitment of participants. In addition, this PS evaluates the research protocol, improve data collection, and develop yhe novice qualitative researcher skills. Furthermore, as (Malmqvist et. al. 2019; Aziz & Khan, 2020) argued, this pilot direct me as a novice researchers to sharpen the interview guide, understand the participant's experience, enhance the ability to face the challenges that arise during the process of data management. Also, the PS assist me to evaluate my skills as a qualitative researcher.

When starting the interviews, rapport should be established to enhance better responses of participants (Jacob & Furgerson, 2012). Moreover, when interviewing children by a novel interviewer, rapport building may play an vital role in children disclose and give more details (Crossman, et al., 2022). When arrange the date and time of the pilot interviews, engagement of participants in this step encourage them to attend the interview in comfortable manner, that evidenced when they answering the questions. On the decided day and time of this PS, participant's mother involved at the beginning of the interview to facilitate familiarizing the child, and the researcher starting with informal conversation by introducing herself and explaining the purpose and benefits of study to facilitate disclose and to establish empathic ties with participants. Before signing the written informed consent by the parent, the participants were put at ease by assuring them of confidentiality by not using the participants' real names in the interview transcripts, conference presentations and publications and using of numbers coded each participant (Gender, Grade, and NO. of interview) e.g. (F, 5, 1) to assure anonymity, and any information obtained would be used just for the purpose of the study. When starting the interview, permission for video recording was obtained from the parent and participating child.

As recommended by (Peterson, 2023), to enhance trustworthiness of the data collected using interview, and to modify the interview guide, i try to obtain rich data that relevant to the main study aims. This approach utilized to encourage participants to explain their experience freely without any limitations or leading questions and guiding them toward the interview questions. Feedback from the participants was obtained through asking them to reflect on the interview question, method of communication and discussion, and duration of interview and the outcome of data collection. Their feedback used to adjust the interview guide and to develop the skills of the researcher. Because of the specific inclusion criteria to the experience of school age children during COVID-19 pandemic and there was very little information about the phenomena the particepant were very interested to participate.

Each interview was arranged for one hour. Interview of the 2<sup>nd</sup> participant conducted within the arranged time limit, while the interview of the 1<sup>st</sup> participant was longer than the time limit that may related to: first, the inexperience student researcher with this data collection technique, and the nature of the question that necessitate repeating and clarification for interviewee to achieve understanding of questions. However, based on the piloting of interview, the student novice researcher's experience was enhanced in term of quality and duration of the 2<sup>nd</sup> interview. This enhancement were disclosed by: (1) improvement of the researcher's interview skills; (2) improvement of the researcher's explanation of the interview guide to participants that facilitating quick answer; moreover, sending of the interview questions to participant's mothers by What Sapp before the interviews that provide enough time to clarify the questions.

One of the challenges the novice qualitative researcher face is the strong emotions of participants that demonstrated when communicating their experience during COVID-19 pandemic particularly, when they took about the impact of the disaster on their education and social isolation. These challenges required the researcher to guide the participating children toward the aim of the interview.

#### 4. CONCLUSION

Conducing of PS in qualitative PhD study lead to improve the understanding of the main elements of the research process, that may involve recruitment and data collection, personal learning experience of novice researcher is enhanced that increase the researcher self-confidence and improve performance, Well prepared PS support the researcher to make decision to assess if the objectives of PS were met or not and to modify the main study.

Despite the usefulness of PSs and the importance to share researchers' experience of piloting-particularly in qualitative inquiry, they remain limitedly discussed in the literatures. This paper report my experience as a novice researcher work under supervision of the PhD study advisor, that may add experience to the body of knowledge in the research community of nursing

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