

A Checklist for Authors, Reviewers and Editors of QCA Publications and Presentations

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Although I remain reluctant to offer a fixed checklist that must be fulfilled for each and every QCA project, it's worth reflecting upon what I'm looking for during my reviews. Often there are omitted elements that prevent me from thoroughly reviewing the work and, unfortunately, there are too many instances in which I am forced to return an article to the journal editor unreviewed because the author failed to include sufficient material for me to understand how they conducted their analysis, assess their results or arrive at the conclusions that they did.

One reason for my skepticism of a standardized checklist is that different disciplines have different standards. In my home discipline of sociology, for example, articles are routinely 30–40 pages and we are permitted great flexibility as to how we structure our arguments. In healthcare research, where I do much of my applied work, we typically have just 6–8 pages and a prescribed article structure. These differences mean that healthcare researchers applying QCA cannot be expected to present arguments in as much detail as that of sociologists. And while this restriction does not excuse offering an incomplete presentation that cannot be thoroughly peer reviewed, health researchers certainly can't be expected to address each and every element of the analysis within the main body of their text. Compromises will be made.

But the primary reason that I have resisted developing a standardized checklist is that I worry about encouraging mechanistic, rote approaches to conducting and reporting QCA. Just as conducting a QCA demands an iterative and constructive approach, so too does reporting its results. There is no set formula for either; instead, the former is the foundation of the latter. Effectively reporting QCA requires crafting a compelling story that explains how you answered your research question given the particular methodological constraints of your project.

And yet, I recognize that when reviewing QCA projects there are indeed common elements—both concrete and intangible—that I consistently look for and seek to understand that go beyond the requisite model parameters and steps need to replicate the analysis. Most fundamentally, I am looking to understand your decision-making process and how you developed the story that you decided to tell:

1 Observation selection

Which observations are included and excluded from your analysis and why? Understanding which observations were left out of the analysis is just as—and often more—important than understanding which were kept in. QCA is a case-oriented methodology and the boundaries you draw to define the cases that you are comparing provide the cornerstone upon which your analysis rests.

2 Data collection and measurement

Methods of data collection, including strengths and weaknesses with regard to this specific project and research question. Prior to calibration (discussed below), the data collection and measurement procedures must be thoroughly explained. Beyond meeting the conventional demands of methodological transparency, in QCA this also provides the foundation upon which to establish a semantically meaningful link between the raw data and corresponding calibrated measures. I want to understand, for example, how any validity and reliability concerns shaped your calibration procedures.

3 Calibration procedures

Calibration is typically the most challenging aspect of QCA and it can be challenging to balance concision and thoroughness in its explication, particularly when word limits are restricted. Far too many authors provide their calibration rules without explaining or justifying them. I need to understand both (a) the *semantic thresholds* that you’ve employed and (b) the *calibration rules* that you defined to assign set membership scores to your observations.

Semantic thresholds In QCA, we distinguish between three types of fuzzy sets. *Continuous fuzzy sets* span the entire 0.0-1.0 interval. *Discrete fuzzy sets* take on a limited number of values within the interval, such as 0.0, 0.3, 0.7 and 1.0. *Crisp sets* are a special form of fuzzy set with just two categories: 1.0 indicates that the observation belongs to the set while 0.0 indicates that it doesn’t.

For each explanatory and outcome condition, it is crucial to explain the semantic (qualitative) meaning of 1.0 (“fully in the set”) and 0.0 (“fully out of the set”). I also want to understand how you recognize when an observation crosses over from being “in” to being “out” of the set. Are there close calls in your dataset? If so, how do you make your determinations and how confident are you in your decisions? (Note that it will draw extra scrutiny from reviewers if you have lots of close calls: truly ambiguous observations are relatively rare in practice and more likely to result from poor calibration practices.)

With discrete fuzzy sets, I also want to understand the semantic meaning of your cutpoints. Each cutpoint requires a definition that qualitatively

distinguishes it from its neighbors. These definitions, taken together, allow me to understand the meaning of the fuzzy set, both in degree and in kind.

Calibration rules In the simplest cases, calibration may not be needed when your raw data is dichotomous. In all other situations, you must make available the calibration rules you used to transform your raw data into calibrated data. When space limitations are prohibitive, calibration rules can be provided in an online supplement.

Calibration rules may be expressed either as statements of qualitative judgment or as mathematical expressions. The former are used when calibrating qualitative data; the latter, for calibrating quantitative data. In both cases, the goal is to render transparent how you determined what fuzzy set scores to assign to your cases. Some people believe that qualitative judgments are inherently more subjective than quantitative judgments. I disagree. The formality of quantitative judgments merely allows them to be more replicable by embedding their subjectivity into mathematical formulas.

Whether your project makes use of qualitative and/or quantitative rules, I want to understand how your calibration rules align to your semantic thresholds. For qualitative calibration, this may entail fairly extensive explanation, including illustrative examples from your cases. While the direct and indirect methods are the most popular techniques of quantitative calibration, mathematical expressions can be as simple or as complex as needed as long as they produce a meaningful 0.0–1.0 set membership score.

4 Necessity testing

Did you conduct a necessity test? Because the presence of necessary conditions affects how one conducts, reports and interprets the sufficiency analysis, failing to mention the former also calls into question the validity of the latter. If you found necessary conditions, explain how you incorporated them into your sufficiency analysis. If you did not find necessary conditions, a sentence or two is sufficient.

5 Truth table(s)

Far too many QCA projects present the truth table as merely an ephemeral artifact created along the way. But the truth table is the heart of QCA, and its construction is an iterative process involving some combination of resolving contradictory configurations, reassessing calibrations, revisiting cases and reconsidering included conditions as one pursues operational closure between one's theory and substantive knowledge. How these stories are told will inevitably

vary. What I wish to understand are the various decisions and judgments you made that led to the truth table(s) that you chose to present and analyze.

Do not omit your truth table. It is expected to be included in the body of your text, but occasionally may be relegated to the appendix. The truth table conveys the configurational structure of your data while providing additional information beyond that which can be gleaned from the calibrated dataset, particularly in a fuzzy-set analysis.

In csQCA, the calibrated dataset and the truth table are redundant and it is therefore unnecessary to include both in the body of the text. It is therefore up to the researcher to determine how best to convey the configurational structure of the data. While a truth table will usually be the better choice for large-N csQCA, it is often a matter of judgment for small- and medium-N projects. Consider the demands of your project and what is most effective in the context of your specific argument. Perhaps a figure is superior to a table? In the end, it is up to you to determine the best way to present the configurational structure of your data.

6 Solutions

A distinguishing characteristic of QCA is that it produces a range of solutions. In the body of the text, the researcher needs to explain which solution(s) they chose to present. It is most common today to present the intermediate and parsimonious solutions (often combined in the form of a Fiss configuration chart) but sometimes it makes sense to present a single solution or a different combination. To avoid confusion, always clarify the solution(s) you are presenting. When presenting the intermediate solution, make sure to state the directional expectations specified. Most importantly, I want to understand why the solution(s) you are presenting makes sense for this project.

Regardless of the solutions presented in the body of the text, your supplemental materials should provide the complex, intermediate and parsimonious solutions, which provide crucial diagnostic information for reviewers.

7 Recipe interpretation

Beyond presenting your empirical results, you must also interpret your recipes substantively and theoretically. What open questions do they resolve? What insights and understandings do they produce? What new puzzles do they raise?



Storytelling in QCA

It was the Russian formalists of the early 20th century, Propp and Tomashevski, who first distinguished between story (*fabula*) and plot (*sjuzhet*), although the concept can be traced back to Aristotle. Whereas *sjuzhet* refers to the skeletal description of fundamental events in temporal sequence, *fabula* refers to how the events are arranged and presented by the author to the reader.

The plot of any empirical research project is invariably messy, filled with successes and insights as well as mistakes, missteps and dead ends. Effective research presentations are selective assemblages from among those elements. The researcher carefully chooses which elements to retain and which to discard, how to present them and in what order, as they construct the story of the research.

When I'm assessing your QCA, I want to understand the question or puzzle that motivated your project and why it matters, your conclusions and the path you traveled to arrive at them. While I don't need to know every twist and turn, I do need to understand the decisions that you made along the way that meaningfully contributed to story you're telling. What were the choices confronting you and how did you decide among them? How comfortable are you with those decisions and, after having made them, how confident are you in your results and with your interpretations of them? Were there particular inflection points that led you in a new direction? How might have your ending have changed if you had turned left rather than right?

In this way, the process of presenting QCA parallels that of conducting QCA. In both cases, we seek to explain an outcome by eliminating irrelevant conditions from our narrative. There are always many stories available from a given plot. As such, it is incumbent upon the researcher to determine which elements to retain and which to exclude. The risk is that excluding the wrong elements destroys the narrative structure. Yet it is only by curating and organizing these events that narrative is created.

QCA supports researchers in developing deeply nuanced and complex analyses. For me, as a reader and reviewer of your work, I need to understand the process by which you've brought theory and method together in your QCA to construct the story you've decided to tell, a process guided by your expertise and judgment.

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Author Biography

Claude Robinson (rubinsonc@uhd.edu) is co-organizer of the Annual QCA Conference of the Americas and Professor of Sociology at the University of Houston–Downtown (Houston, Texas, USA), where he teaches courses on research methods, social inequality, and culture. His research program encompasses three lines of inquiry: methodological research on developing formal methods of qualitative research, focusing on QCA; sociological research on the relationship between the global political economy and aesthetic form; and health services research on the conditions that facilitate/hinder the success of interventions designed to improve patient outcomes. Since 2012, he has served on the leadership team of COMPASSS, the international, inter-university consortium of QCA and CCM practitioners. In 2025, he founded *Configurational Insight*, a consultancy specializing in QCA and CCMs.