

**DELPHI STUDIO**

# A Methodologically Defensible Way to Run Delphi Consensus Studies

A skimmable 10-minute methodology and platform brief for principal investigators, co-investigators, IRB reviewers, and journal editors.

Version 1.0 | May 9, 2026 | Prepared for research, QI, and governance teams

## At a glance

What it is	Best fit	Core promise	Outputs
A digital workflow for planning, executing, analyzing, and reporting Delphi studies.	Consensus questions where evidence is incomplete, contested, or judgment-laden.	Methodological discipline without forcing investigators into spreadsheet workarounds.	Round tables, audit trail, feedback packets, methods boilerplate, and reporting checklists.

### What this document is

This brief explains how Delphi Studio operationalizes the Delphi method: a structured, iterative approach to expert consensus. It is written to be fast to skim, but specific enough to support protocol development, IRB review, and journal-facing methods documentation.

## 1. The Delphi method: background and fit

The Delphi method was developed at RAND in the mid-20th century to organize expert judgment when direct empirical evidence is limited or uncertain. Its classic design uses repeated questionnaires, controlled feedback, and statistical summaries to move a panel toward transparent consensus without requiring face-to-face group pressure.

### Four defining features

- **Anonymity:** participants do not deliberate in a public room, reducing dominance effects and status bias.
- **Iteration:** panelists respond across repeated rounds, allowing reconsideration after seeing controlled feedback.
- **Controlled feedback:** the research team returns group summaries, not unstructured debate.
- **Statistical aggregation:** consensus is defined through pre-specified quantitative rules rather than impressionistic interpretation.

### Use Delphi when...

- The question requires expert judgment and cannot be answered adequately by an RCT, registry analysis, or systematic review alone.

- The goal is to define standards, priorities, competencies, implementation criteria, or safety principles.
- Stakeholder expertise is distributed across disciplines, institutions, or roles.

## Do not use Delphi when...

- The question is directly answerable from high-quality comparative evidence.
- The PI only needs a convenience survey rather than a consensus process.
- The study lacks a defensible panel selection strategy or a priori consensus criteria.

## 2. How Delphi Studio structures each phase

### Design principle

Delphi Studio maps the investigator workflow to the methodological logic of a Delphi study: define the question, recruit the right panel, lock the protocol, collect round responses, return controlled feedback, determine consensus, and export the evidence trail.

Platform phase	Methodological purpose	Evidence-ready output
<b>Scoping</b>	Clarify research question, scope boundaries, PICO-style framing, and exclusions.	Protocol-ready scope statement and eligibility logic.
<b>Panel composition</b>	Define expertise criteria, sampling strategy, stakeholder groups, target N, and attrition plan.	Panel matrix, invitation list, COI fields, and recruitment audit.
<b>Item generation</b>	Support literature-derived items or open Round 1 item generation with phrasing guardrails.	Versioned item bank with source/rationale metadata.
<b>Round design</b>	Configure Likert/RAND-style scales, consensus thresholds, stopping rules, and max rounds.	Locked round instrument and a priori consensus rule set.
<b>Round execution</b>	Send invitations, preserve anonymity, track completion, and schedule reminders.	Response ledger, reminder log, and round status record.
<b>Controlled feedback</b>	Show medians, IQRs, distributions, own prior rating, and anonymized rationales.	Panelist feedback packet for the next round.
<b>Analysis</b>	Calculate agreement, dispersion, stability, and item disposition.	Consensus table with retain/revise/drop flags.
<b>Reporting/export</b>	Package methods text, tables, flow diagrams, audit logs, and supplements.	Manuscript-ready materials and reproducibility bundle.

## 3. Consensus and stability definitions

Delphi Studio treats consensus as a pre-specified protocol decision, not a post hoc label. Defaults are designed to be familiar to health professions consensus studies, while remaining editable before launch.

Signal	Typical default	Platform flag	Investigator action
<b>Consensus reached</b>	70-80% agreement plus low dispersion such as IQR <= 1	Green: consensus	Retain for final set or advance unchanged
<b>Near consensus</b>	Agreement close to threshold or improved stability	Amber: near consensus	Revise, clarify, or continue one more round
<b>No consensus</b>	Persistent dispersion, low agreement, or unstable ratings	Red: no consensus	Drop, split, or report as unresolved
<b>Stable but divided</b>	Little movement across rounds but no agreement	Purple: stable disagreement	Report as meaningful divergence, not failure

## Round-to-round item logic

1. Retain items that meet the pre-specified consensus definition.
2. Revise items when free-text comments identify ambiguity, double-barreled phrasing, missing context, or scope mismatch.
3. Drop items when support remains low, dispersion remains high, or the item falls outside the agreed construct.
4. Stop when consensus and stability rules are satisfied or the maximum number of rounds is reached.

## 4. Reporting-standards alignment

The platform is designed around reporting traceability. It cannot write the investigator's scientific rationale, but it can capture the decisions, timestamps, thresholds, panel structure, and round-level outputs that make a Delphi manuscript auditable.

Reporting domain	ACCORD / CREDES / related expectation	Auto-captured by Delphi Studio	PI narrative still needed
<b>Rationale</b>	Why Delphi is appropriate for the question	Study objective, scope, protocol version	Justification for why consensus is needed
<b>Panel selection</b>	Expertise criteria, recruitment, stakeholder mix	Eligibility fields, invitations, panel matrix	Scientific rationale for who counts as expert
<b>Consensus criteria</b>	A priori thresholds and stopping rules	Rule-set version, thresholds, round limits	Why selected thresholds fit the domain
<b>Rounds</b>	Number, timing, attrition, reminders	Round status, completion rates, reminders	Interpretation of attrition and deviations
<b>Feedback</b>	What panelists received between rounds	Feedback packet content and versions	Rationale for feedback choices
<b>Analysis</b>	Aggregation, dispersion, stability, item disposition	Median, IQR, percent agreement, stability metrics	Methodological interpretation
<b>Ethics</b>	Consent, anonymity, COI, data handling	Consent version, COI capture, access logs	IRB-specific context and local policy
<b>Reporting package</b>	Tables, flow, appendices, audit trail	Export bundle and audit log	Journal-specific manuscript framing

## 5. Data integrity and ethics

### Ethical posture

Delphi Studio is built for research teams that need both methodological transparency and participant protection. The platform separates identity management from response analysis, records consent and COI data, and preserves an audit trail suitable for review.

- Anonymity model: feedback is shown in aggregate and comments are de-identified before redistribution to the panel.
- Access control: study teams can manage participants and study configuration; panelists see only their assigned instruments and feedback.
- Consent flow: invitation language, consent version, and completion timestamps can be retained for the study record.
- Conflict-of-interest capture: panelists can disclose relevant financial, professional, or intellectual conflicts before participation.
- Data residency and retention: local institutional requirements should define retention duration, export storage, and deletion/archive policies.
- Accessibility and language: instruments should be written for clarity, screen-reader compatibility, and culturally appropriate interpretation.

## 6. Limitations and threats to validity

Threat	Why it matters	Built-in mitigation
<b>Selection bias</b>	The panel may not represent the relevant expertise landscape.	Explicit expertise criteria, stakeholder mix targets, and recruitment log.
<b>Panel fatigue</b>	Later rounds may lose participants or reduce response quality.	Attrition monitoring, reminders, concise feedback packets, and round limits.
<b>Regression to group mean</b>	Panelists may conform to group summaries without independent reasoning.	Anonymized rationales, stability reporting, and no forced agreement.
<b>Facilitator influence</b>	Item wording and feedback framing can shape outcomes.	Versioned item edits, audit log, and transparent controlled feedback settings.
<b>False consensus</b>	A numeric threshold can mask unresolved conceptual disagreement.	Near-consensus and stable-disagreement flags plus comment review.

## 7. Outputs you can export

<b>Panelist flow</b>  PRISMA-style flow of invited, consented, completed, withdrawn, and analyzed participants across rounds.	<b>Round-by-round item tables</b>  Per-item median, IQR, percent agreement, rating distribution, change from prior round, and final disposition.
<b>Methods boilerplate</b>  Editable methods-section text based on actual study configuration, thresholds, and round execution.	<b>Audit and supplement bundle</b>  CSV/JSON export of key decisions, timestamps, rule sets, versions, and analysis outputs.

### Why this matters

A Delphi study is only as credible as its design record. Delphi Studio helps investigators move from ad hoc spreadsheets to a structured, auditable, standards-aligned workflow that supports protocol review, participant management, reproducible analysis, and manuscript preparation.

## 8. References and further reading

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## Appendix: glossary and version history

Term	Working definition
<b>Consensus threshold</b>	A pre-specified rule for labeling an item as accepted, rejected, or unresolved.

<b>IQR</b>	Interquartile range; a measure of dispersion often used to judge rating convergence.
<b>Controlled feedback</b>	A structured summary sent to panelists between rounds.
<b>Launch Snapshot</b>	An immutable record of the exact study configuration used at launch.
<b>Stability</b>	The degree to which item ratings stop changing materially across rounds.

**Version history:** v1.0, May 9, 2026 - Initial marketing-methodology brief for Delphi Studio.

## Suggested citation block

**Document citation:** Delphi Studio. A Methodologically Defensible Way to Run Delphi Consensus Studies. Version 1.0. 2026.

**Platform citation:** Delphi Studio [software platform]. Delphi consensus study design, execution, analysis, and reporting workflow. Version/date accessed to be supplied by the investigator.

## Protocol-ready language

**Investigators may adapt the following statement:**

*The study will use Delphi Studio to administer iterative expert-rating rounds, preserve panelist anonymity in between-round feedback, apply pre-specified consensus thresholds, and export round-level summary statistics and an audit trail for reporting and reproducibility.*

## Document control checklist

Before IRB submission	Before launch	Before manuscript submission
Confirm protocol version, consent language, panel eligibility, and data retention plan.	Lock item versions, rating scales, consensus rules, feedback settings, and reminder schedule.	Export final tables, attrition flow, checklist alignment, methods text, and supplement bundle.
Specify whether the project is research, QI, evaluation, or mixed-purpose.	Verify no post-launch editable configuration objects will alter the instrument record.	Report deviations, attrition, non-consensus items, and any changes from protocol.