



# Qualitative Research Toolkit

Designing Equity-Centered, Community-Informed  
Qualitative Research in Early Education

PREPARED BY  
Toshiba Adams, PhD



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## PURPOSE OF THIS TOOLKIT

This toolkit is designed to support state leaders, agencies, and community-based organizations interested in designing and implementing equity-centered qualitative research with members of the early education workforce. Drawing from the Advancing Equity Steering Committee model in Wisconsin, it outlines guiding principles, actionable steps and tools to ensure research is both methodologically sound and inclusive of those most impacted by early care and education policy.

## WHAT IS QUALITATIVE RESEARCH?

Qualitative research is a research approach, that typically uses tools such as interviews and focus groups, to better understand the lived experiences of particular groups of individuals (Denzin & Lincoln, 2011). For many, this type of research is nestled in a framework of social justice, giving power to those who often times experience systemic marginalization (Delgado & Stefancic, 2001; Denzin & Lincoln, 2011; Love, 2004; Solorzano & Yosso, 2002). Furthermore, this type of liberatory design challenges traditional academic research models that treat communities – particularly communities of color and economically marginalized – as objects of study rather than key contributors of knowledge.



**Research must be conducted not *on* people but *with* people,  
and not *for* people but *by* people, if it is to have any  
transformative value**

-Linda Tuhiwai-Smith (1999)

## KEY TERMS and DEFINITIONS

- International Review Board (IRB): a committee responsible for reviewing and approving research involving human participants to ensure that it is ethical, safe and in compliance with federal regulations. The primary goal of the IRB is to protect the rights, welfare and dignity of individuals participating in research studies.
- Research Participants: the individuals who voluntarily share their lived experiences, perspectives and insights regarding a specific topic or phenomenon being studied. They are considered knowledge-holders whose voices form the main data of the research (Ladson-Billings, 1998; Yosso et al., 2001).
- Qualitative Research Framework: the overarching strategy that informs how a study is designed, conducted, and analyzed. Qualitative frameworks include:
  - Narrative inquiry: explores how people make meaning of their experiences through storytelling (Merriam & Tisdell, 2016; Museus & Iftikar, 2013; Solorzano & Yosso, 2002)
  - Phenomenology: prioritizes an individual's lived experience and focuses on understanding how they experience and make meaning of a particular phenomenon (Englander, 2012)
  - Participatory: engages research participants within the research design to serve as change agents for themselves and their communities (Belansky et al., 2001).
- Research Methods: approaches used to explore and understand the meaning people assign to their experiences, identities, behaviors, and social contexts (Creswell, 2014). Examples of qualitative methods include:
  - Demographic Survey: a questionnaire used to collect background information about research participants, for example, race, ethnicity, gender, age, job position, etc. This data is conducted to ensure diversity in the selected research participants and can be displayed through a chart, infographic or summary.
  - Interview: a data collection method used in qualitative research to explore participants' experiences and perspectives. Qualitative interviews typically include open-ended and flexible questions, allowing for a rich, conversational exchange (Creswell, 2014).
  - Interview Protocol/Guide: a structured yet flexible list of questions that a researcher uses to conduct interviews. It serves as a roadmap

to ensure key areas of inquiry are covered while also allowing space for natural conversation, storytelling, and participant-led insight.

- Focus group: a guided group discussion used to explore participants' experiences, perspectives, beliefs, or attitudes on a specific topic, allowing for shared meaning making (Creswell, 2014).
- Member Checking: the task of inviting research participants to review interview data to check for accuracy of findings and interpretations (Creswell, 2007; Seidman, 1991).
- Culturally and Linguistically Responsive Research: the idea that the research design, construction of documents and interactions with research participants should honor their racial, ethnic and cultural dispositions as well as their individual worldviews. Additionally, this approach intentionally views research participants as key contributors of knowledge and aids in empowering them throughout the research process (Ladson-Billings, 1995, 1998; Yosso et al., 2001).

## QUALITATIVE RESEARCH & EARLY CHILDHOOD EDUCATION

Qualitative research has become an essential approach in the study of early education, offering tools to explore the complexity of teaching, learning, higher education systems and its workforce (Adams, 2023; Adams et al., 2022; The National Association for the Education of Young Children, 2021). Unlike quantitative methods that focus on measurement and generalization (Rigby et al., 2007), qualitative inquiry allows for a deeper understanding of how early educators, children, and families experience educational systems in a variety of contexts (Creswell & Creswell, 2023).

One of the strengths of qualitative research in early education is its capacity to center lived experiences of individuals who are often underrepresented in policy and scholarship (Ladson-Billings, 1998; Museus & Iftikar, 2013; Solorzano & Yosso, 2002; Yosso et al., 2001). Methods such as interviews, focus groups and narrative inquiry allow researchers to capture educators' voices and perspectives related to a particular topic (Creswell & Creswell, 2023). This is particularly important in studies that examine racial, cultural and geographic diversity within the early education workforce, as their stories help challenge dominant narratives and interrogate power dynamics (Adams, 2023; Solorzano & Yosso, 2002).

In recent years, researchers have used qualitative approaches to study topics such as teacher identity, equity in access, family engagement and workforce well-being (Adams, 2023; Adams et al., 2022; Dereli & Kurtca, 2023; Hyunjin & Marshall, 2024; National Association for the Education of Young Children, 2021). These studies emphasize the importance of context—highlighting how educators’ work is shaped by structural inequities, cultural values, and local policies. Furthermore, community-based and participatory designs (Belansky et al., 2001) have been adopted to ensure that findings reflect not only what is studied, but also how and with whom the research is being conducted (Fine, 2017).

In summary, qualitative research provides a rich, flexible and ethical approach to understanding early childhood education systems, including its workforce. It is particularly valuable in advancing equity by amplifying the voices of educators, families and children and by offering insight into the multi-layered dimensions of early learning structures that are often overlooked in numeric data alone.

## GUIDING PRINCIPLES OF QUALITATIVE RESEARCH

### Center Lived Experience

- honor the voices, lived experience and knowledge of early educators

### Community Collaboration

- design research in partnership with early educators, encouraging them to serve as co-researchers.

### Build Trust

- communicate purpose, process and outcomes clearly with early educators.

### Design Action-oriented Outcomes

- align data collection with real policy & systemic change goals.

## QUALITATIVE RESEARCH STUDY STAGES



## QUALITATIVE RESEARCH STUDY STEPS

| STEP | TASK                                            | DESCRIPTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Determine purpose                               | <ul style="list-style-type: none"> <li>Define the question(s) that your state needs answered.</li> <li>Identify whose experiences are most critical to answering the question(s) and understanding system challenges.</li> </ul>                                                                                                                                                                                                                                                             |
| 2    | Complete the IRB process                        | <ul style="list-style-type: none"> <li>Submit IRB application to be granted permission to conduct research on human participants.</li> </ul>                                                                                                                                                                                                                                                                                                                                                 |
| 3    | Develop a culturally responsive research design | <ul style="list-style-type: none"> <li>Adopt a qualitative research approach</li> <li>Use narrative inquiry, phenomenology or participatory frameworks.</li> <li>Ensure questions are respectful, responsive to cultural and linguistic needs of the participants and align to the study's purpose.</li> </ul>                                                                                                                                                                               |
| 4    | Recruit a diverse participant pool              | <ul style="list-style-type: none"> <li>Design a recruitment flyer.</li> <li>Partner with community-based organizations, state alliances or workforce registries as well as use social media and personal affiliations to reach early educators.</li> <li>Disseminate recruitment flyer.</li> <li>When selecting participants, ensure diversity in participant's age, race, ethnicity, gender and job position.</li> <li>Offer stipends or incentives to value participants' time.</li> </ul> |

|          |                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----------|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>5</b> | Conduct Interviews             | <ul style="list-style-type: none"> <li>• Use trained researchers who reflect or relate to the participant population (i.e., race, ethnicity, gender, age, etc.).</li> <li>• Offer flexible participation options, for example, virtual and in-person interview settings as well as language translation, as needed.</li> <li>• Ensure that participants read and sign the consent form.</li> <li>• Share the research overview with participants.</li> <li>• Work through the interview guide.</li> <li>• Audio record, with permission, the interviews to create the research data.</li> <li>• Take notes during the interview to describe participant's disposition and track follow-up questions (if necessary).</li> </ul> |
| <b>6</b> | Transcribe Data                | <ul style="list-style-type: none"> <li>• Transcribe the interview and focus group data verbatim to prepare for the analysis process.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>7</b> | Analyze Data                   | <ul style="list-style-type: none"> <li>• Review the transcribed data and search for themes that reflect both challenges and assets.</li> <li>• Determine major themes based on topics that were shared across interviews.</li> <li>• Invite participants to review findings for accuracy (i.e., member-checking).</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>8</b> | Establish an Ongoing Committee | <ul style="list-style-type: none"> <li>• Form a steering committee of participants to co-analyze and develop recommendations.</li> <li>• Meet monthly or quarterly to move research into policy action.</li> <li>• Offer stipends for their ongoing participation.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

## HOW TO COMPLETE THE IRB PROCESS

### **IRB Registration**

- Find an IRB organization
- Complete the IRB registration process

### **Prepare an IRB application, including:**

- A **brief research summary** (purpose, research questions, methods)
- The **informed consent form**
- All data collection materials (e.g., interview guides, surveys)  
A **data security plan** outlining how participant information will be protected

[SOURCE: U.S. Department of Health & Human Services](#)

## RECOMMENDED TOOLS AND TEMPLATES

- [Sample Interview Protocol](#)
- [Informed Consent Template](#)

## TURN FINDINGS INTO ACTION

### Develop Deliverables

- Final report
- White paper
- Executive summary
- Policy briefs
- Infographics

### Support participants in presenting findings

- at local, state and national conferences
- to state leaders and legislatures

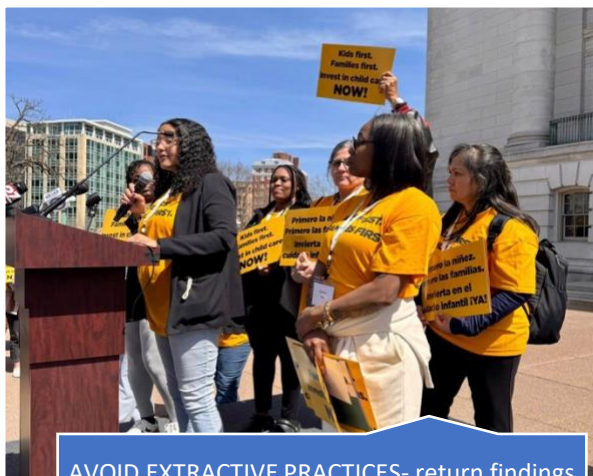
### Draft shared recommendations for agency and/or legislative action

- co-present to state leaders
- co-present to legislatures

### Follow-up

- Follow-up with state leaders and legislatures regarding policy recommendations

## HELPFUL TIPS



**AVOID EXTRACTIVE PRACTICES**- return findings to the communities by ensuring that the work is done "for, rather than on" the participants (Hylton, 2012, p. 35).



**SUSTAINED ENGAGEMENT BUILDS TRUST** - try to host at least one interview and a follow-up discussion with each participant. They will typically be more relaxed and forthcoming during the second interview



**RESPECT EDUCATOR WORKLOAD** - Provide incentives for their time and schedule discussions based on their schedules



**ENGAGE STAKEHOLDERS EARLY**- invite stakeholders and educators to provide feedback on the research design and findings, not simply the dissemination phase

# PRO TIPS FOR COMMUNITY- DRIVEN RESEARCH

## BUILD BEFORE YOU ASK

Form relationships with key community leaders and educators before collecting data. Trust leads to richer stories and better results.



## TRANSLATE RESEARCH INTO PLAIN LANGUAGE

Use clear language in surveys, consent forms and reports - especially for multilingual or non-academic audiences.

## CO-PRESENT WHEN POSSIBLE

Invite educator participants to co-present findings at conferences, briefings and community forums. Representation matters in both research and dissemination.



## RELY ON LIVED EXPERIENCE

Early educators may not use research jargon, but they bring insight, patterns and solutions from their lived experience. Design tools that honor their language and culture.

## MAKE THE FINAL REPORT SHAREABLE

Design a one pager, infographic, executive summary or video summary that can be widely shared.



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