FRAMEWORK FOR QUALITATIVE DATA COLLECTION AND USE

A Guide to Elevating the Voices of North Carolina's Early Childhood Community

JUNE 2024

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES
Division of Child Development and Early Education

raise north carolina

SCHOOL READINESS CONSULTING

ACKNOWLEDGMENTS

The Framework for Qualitative Data Collection and Use and the activities that informed its development were supported by the North Carolina Division of Child Development and Early Education (DCDEE) in partnership with School Readiness Consulting (SRC).

We would like to express our heartfelt gratitude to the families, early childhood teachers, early childhood directors and administrators, Family Child Care Home Providers, community leaders, and DCDEE staff who generously shared their experiences to inform development of the Framework. This resource was greatly enriched by your feedback, ideas, and insights. Your experiences will help to broaden the understanding of community engagement experiences as the Division continues to develop data-informed approaches and enhance the programs and services it provides to young children and families.

WORKGROUPS

We have tremendous appreciation for our Advisory Council (members of both the Community Workgroup and DCDEE Workgroup), as well as participants in the DCDEE Pilot, whose honest input and steady guidance were integral to shaping the Framework from beginning to end.

COMMUNITY WORKGROUP MEMBERS (in alphabetical order)

Marilyn Bernabe
Mindy Davis
Davida Dawson
Margo Ford Crosby
Devonya Govan-Hunt
Candice Knox
Kayla Lawson
Sharee Pemberton
Rochelle Sanders
Christopher Singleton
Karen Thompson
Jennifer Threadgill
Joy Turner
Banu Valladares

DCDEE WORKGROUP MEMBERS (in alphabetical order)

Sonya Ashe
Nakita Bellamy
Lauren Davis
Vallarie Douglas
Tammy Freeman
Jennifer Gardner
Leslie Gordon
Allison Keisler
Melissa Loehr
Tukeshia McCormick

DCDEE PILOT PARTICIPANTS (in alphabetical order)

Nicole Boone
Vallarie Douglas
Laura Hewitt
Patricia McCarter
Janessa Nives

A huge thanks to our partners at the DCDEE who worked alongside the SRC team throughout the development and implementation of this effort. We felt your commitment and passion throughout the process. We look forward to the strides the Division will continue to make as you enhance your processes in service to young children, families, and the early childhood community more broadly.

Ariel Ford
Sarah Hutchinson
Toni King
Theresa Roedersheimer
Justine Rogoff
Tracy Zimmerman

ABOUT SCHOOL READINESS CONSULTING

The Framework was prepared by School Readiness Consulting. As a consulting firm focused exclusively on children from birth through third grade, SRC partners to develop and implement strategies that improve outcomes for children in school and life. SRC believes that improving early childhood and affirming the right for all children to thrive represents the greatest opportunity to create a just society.

CONTRIBUTORS (in alphabetical order)

Jennifer Caldwell
Mariam Dahbi
BreAnna Davis Tribble
Lisa López-Escobar
Aisha Pittman Fields
Nicole Sharpe
Judi Stevenson-Garcia
Annie Watson

EDITING & DESIGN

Cathy Cambron, *Editcetera*
Danielle Ness, *Hey Darlin'*

Suggested citation: School Readiness Consulting. (2024). *Framework for Qualitative Data Collection and Use: A guide to elevating the voices of North Carolina's early childhood community*.

TABLE OF CONTENTS

GROUNDING

THE OPPORTUNITY

The Power of Listening to and Learning From the Community

All children deserve a strong start in life. Experiences during the first few years of life can set the foundation for all future growth and learning. Understanding this, the North Carolina Division of Child Development and Early Education (DCDEE) is committed to setting every child up for success. To do so, DCDEE is focused on increasing access to high-quality child care for young children and their families across North Carolina. As a key part of this work, DCDEE focuses on improving child care across the state by offering more opportunities to listen to and embrace the ideas, stories, and perspectives of the early childhood community.

At the heart of DCDEE's work is a strong commitment to centering the voices of community members. North Carolina's child care community is the driving force behind programming, decisions, and policymaking. By laying the foundation for a formalized approach to centering community voices at the state level, DCDEE is a pioneering agent of change, dedicated to equity, inclusivity, and high-quality care for the youngest members of North Carolina's population and their families. This means that the North Carolina child care community is not a passive recipient but an active contributor informing programs, decisions, and policymaking processes.

To further engage and elevate community voices, DCDEE is working to improve its community engagement approaches and leverage the use of qualitative data. Through ongoing efforts, DCDEE seeks to create more equitable and inclusive spaces and opportunities for community voices to have a clear path for driving impactful change. Central to DCDEE's transformative approach is integrating qualitative data collection and use. This deeply informative and rigorous method emphasizes the "how" and "why" of community members' experiences and perspectives. Qualitative data collection uses tools such as interviews, focus groups, open-ended survey questions, and observations to capture a multi-angle view of the community's lived realities, and it offers pathways for research-led, community-informed policy and decision-making. Through use of qualitative data, DCDEE intends to closely listen to community experiences and amplify voices that might otherwise go unheard. These stories, insights, and feedback become invaluable resources, guiding decision-makers toward policies that respond to and resonate with the community's diverse needs.

This significant and dedicated effort led to the creation of the Framework for Qualitative Data Collection and Use. The Framework serves as a "North Star," lighting a path toward more intentional community engagement, responsive and transparent decision-making, and ongoing and open communication. It captures the heart of DCDEE's mission: "to ensure the health and safety of children in child care programs, to promote quality child care by implementing evidence-based standards and to increase access to quality child care to families and children across North Carolina." The Framework stands as a testament to the shared commitment of the Division and its partners to secure a brighter future for North Carolina's youngest community members.

WHAT'S THE FRAMEWORK?

Because deep, meaningful engagement and authentic data collection can be complex, the Framework is designed to go beyond the typical offerings of a simple toolkit or handbook. It was developed as a unique and robust resource for DCDEE (and any others invested) to listen, learn, and center community voice in decision-making and action. While being informed by research-based practices, the Framework has also been directly shaped by the insights and experiences of those in the early childhood community. All throughout the following sections, you will find an assortment of guidance for the collection and use of qualitative data:

TIPS to outline best practices and other helpful suggestions

STORIES to share ideas and bright spots directly from the field

TOOLS to support the collection and use of qualitative data

RESOURCES to provide more in-depth explorations of related topics

EQUITY CHECKS to reflect on your own beliefs, biases, and values as they relate to your effort

The hope is that the Framework inspires deeper work and new thinking to elevate community voice as a driver for change on behalf of all young children across North Carolina and the early childhood field more broadly.

THE APPROACH

Shaping a Comprehensive Framework for Meaningful Engagement and Change

The development of the Framework for Qualitative Data Collection and Use has been marked by a series of efforts to elevate community voices and improve stakeholder engagement. In 2022, DCDEE supported a comprehensive, statewide effort to redefine how it engages community voices in shaping early childhood education. A third-party evaluation of DCDEE's current collection and use of qualitative data was conducted, documenting DCDEE's existing strategies for qualitative data collection and how these strategies are experienced by the early childhood community. This exploration served as a springboard to answer key questions:

- What is currently being done to gather ideas, input, and feedback from the early childhood community?
- What qualitative data is needed to guide decision-making, and how should we collect it?
- How can qualitative data add context and depth to our understanding and be used to drive action?

Overall, DCDEE learned more about how communities want to be engaged and ways to ensure that historically marginalized communities are authentically involved in opportunities that inform state-level decisions. Through surveys, focus groups, interviews, and advisory workgroups, DCDEE heard from more than 1,800 individuals, including DCDEE staff; early childhood directors, administrators, and teachers; Family Child Care Home Providers; and families of young children who had attended child care programs.

The study yielded important insights that laid the foundation for the development of the Framework. These included the need for more inclusive stakeholder engagement and an emphasis on involving diverse voices. Trust and transparency emerged as themes, highlighting the importance of open communication in building strong relationships between the Division and community members. The findings also reinforced the importance of gathering feedback and translating it into actionable steps. These findings, which are presented in more detail below, collectively guided DCDEE's commitment to amplifying community voices and leveraging qualitative data as a powerful tool for equitable and impactful policy- and decision-making.

LEARN MORE ABOUT THE STUDY – Listening to and Learning From the Community: North Carolina Division of Child Development and Early Education Stakeholder Engagement Study.

Design of the Framework also incorporates what we know about best practices in qualitative research. A scan of more than 75 relevant resources was conducted to elevate effective approaches and highlight key emerging trends for data collection and use. DCDEE staff also participated in a pilot effort to test out the Framework firsthand to ensure approaches were most effective and provide further guidance for refinement.

This groundbreaking effort laid the foundation for development of the Framework for Qualitative Data Collection and Use. By embracing the study findings and forward-thinking research strategies, DCDEE has unlocked a new way of understanding North Carolina's early childhood community. This pathway builds on existing strengths and offers a renewed approach to engaging families, early childhood providers, community leaders, and all others invested in the well-being of young children. The Framework is a comprehensive guide to enhance community engagement and offers a robust approach to the planning, collection, and analysis of qualitative data to inform meaningful action.

CREATING THE FRAMEWORK

MORE THAN 1,800

NORTH CAROLINIANS

directly contributed their voices to inform the development of the Framework

A WIDE RANGE OF EARLY CHILDHOOD COMMUNITY MEMBERS, LEADERS, AND EXPERTS OFFERED THEIR IDEAS, SHARED EXPERIENCES, RETOLD STORIES, AND PROVIDED KEY GUIDANCE.

Early childhood community members across the state—including families of young children; early childhood directors, administrators, and teachers; Family Child Care Home Providers; and DCDEE staff—participated through surveys, focus groups, interviews, and advisory workgroups.

WHAT WE HEARD	WHAT CAN BE DONE
1. The Division provides different opportunities to share feedback, but early childhood community members are not always aware of them and don't always participate.	Develop additional approaches for collecting and using community members' stories and feedback.
2. Early childhood community members want different options for sharing their stories and want to be met where they are.	
3. The Division has heard mostly from early childhood directors and administrators. Other community members faced barriers that kept them from sharing their perspectives.	Increase outreach efforts and address barriers to ensure diverse voices are heard.
4. Early childhood community members want to share stories about lived experiences and how policies impact practice and people "on the ground."	Provide opportunities for early childhood community members to share stories and lived experiences to inform decision-making.
5. Early childhood community members want to share feedback with those they trust.	Work to develop trust with community members.
6. Early childhood community members want to see action based on the feedback and experience they share.	Use feedback from early childhood community members to inform concrete actions.

MORE THAN 75 RESOURCES were reviewed to elevate best practices in qualitative research.

A PILOT PROGRAM WAS CREATED to test the Framework and offer guidance to hone content.

All led to creating the final FRAMEWORK FOR QUALITATIVE DATA COLLECTION AND USE

Why should leaders engage with the Framework? Because it equips all involved with the means to elevate community voices in ways that are intentional, impactful, and aligned with the bold ambition of driving more responsive and equitable change for young children, families, and communities across North Carolina.

MAKING THE CASE

Grounding in the Importance of Qualitative Data

Before diving into the Framework in greater detail, it can be helpful to begin by first understanding the fundamental nature and value of qualitative data and the considerable impact it can have. Adopting the Framework represents an important culture shift within DCDEE, fostering wider recognition, deeper understanding, and a more robust investment in the power of qualitative data.

What Is Qualitative Data?

Qualitative data is information that cannot be counted or entirely represented by numbers and statistics. Qualitative data is typically gathered from interviews, focus groups, open-ended survey questions, and observations. Rigorous qualitative data collection and analysis approaches focus on answering the "how" and "why" and enable a deeper understanding of human experiences and contexts. Though qualitative data does not usually involve numerical data, it does not need to exist in isolation from quantitative data and can support or be supported by quantitative data to create a more layered and powerful story.

Source: Merriam, S. B., & Tisdell, E. J. (2016). Qualitative research: A guide to design and implementation (4th ed.). Wiley and Sons.

Why Qualitative Data?

Qualitative data is a dynamic catalyst for embracing a community-centered philosophy that drives policy development, program implementation, and the pursuit of equity. It unlocks the power of community voices, infusing research-informed decisions with the rich tapestry of lived experiences, knowledge, and insights. Here are five pivotal reasons qualitative data takes center stage in DCDEE's journey.

1. **Amplifying lived experiences.**
   Qualitative data allows us to dive deep into the stories and realities of the early childhood community. Rooted in the authentic voices of people, it can be used to share diverse perspectives and unveil nuanced insights through the lenses of distinct populations and communities.

2. **Uncovering the "how" and "why."**
   Qualitative data isn't just about the "what." It helps to explore, diving into the depths of the "how" and "why." Through intricate methodologies such as open-ended surveys, interviews, and focus groups, the collection and analysis of qualitative data unearth the underlying motives and experiences that shape decisions.

3. **Unveiling comprehensive needs.**
   Through narratives, anecdotes, and feedback, qualitative data illuminates the multifaceted needs of programs, staff, children, and families. It offers decision-makers fresh perspectives on daily challenges, successes, and potential pathways forward, painting a complete picture of community aspirations.

4. **Enriching quantitative insights.**
Qualitative data is an important companion to quantitative data. Intertwining stories and experiences with numbers, qualitative data enriches the context and provides a multidimensional understanding of communities and their needs.

5. **Fostering trust and transparency.**
The act of gathering feedback and sharing information is a cornerstone of trust-building and transparency. Qualitative data ensures that many different voices are heard, while the sharing of insights nurtures an open, accountable relationship between DCDEE and the community.

At its core, qualitative data isn't just information; it's the essence of community wisdom distilled into actionable insights. As we journey through this transformative landscape, the next phase of our exploration will delve into the Framework itself, uncovering its layers and how it channels the power of qualitative data to shape a future defined by equity, collaboration, and impact.

At the heart of DCDEE's commitment to a community-centered approach, qualitative data is not just a methodology; it's a philosophy that resonates with the goals of equity, empowerment, and authenticity. By choosing to embrace this approach, DCDEE is taking a bold step toward designing and implementing strategies that genuinely reflect the unique needs and voices of its communities.

VIDEO ABOUT THE IMPORTANCE OF QUALITATIVE DATA

THE FRAMEWORK

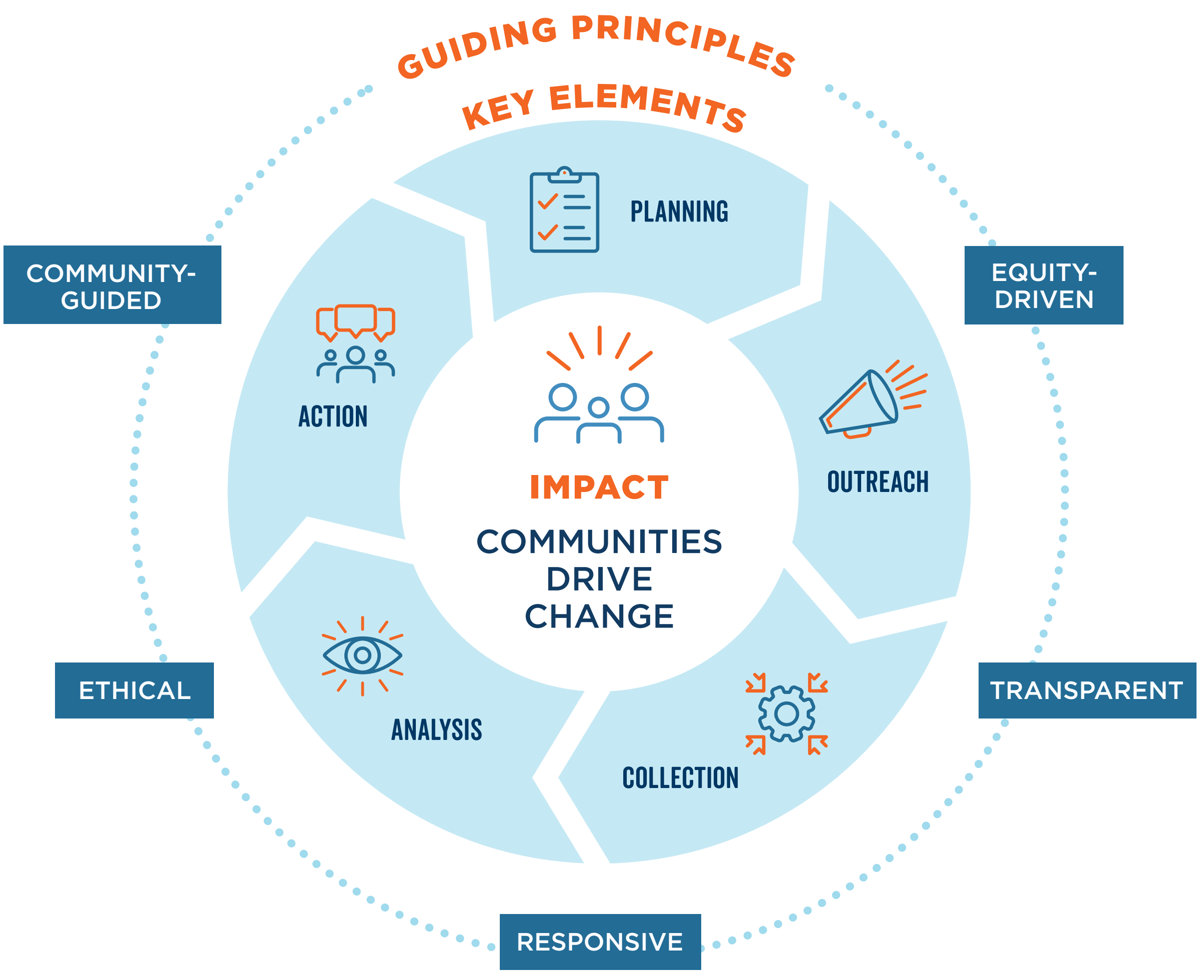
OVERVIEW

A Community-Driven Theory of Change

The Framework will support DCDEE's existing efforts to use qualitative data as a means to build trust with communities and enhance the services the Division provides to ensure the state's youngest children have what they need to reach their full potential. At the foundation of this effort is a bold theory of change in which the voices of the early childhood community are elevated as key drivers of change. In this way, the Framework has three core components:

1. **Guiding principles** *are core beliefs that must hold true and be centered throughout all actions.*
2. **Key elements** *are the necessary steps to ensure that approaches to data collection and use are conducted in intentional and effective ways.*
3. **Intended impact** *captures the vision of how an enhanced community-driven approach will lead to significant change.*

FRAMEWORK FOR QUALITATIVE DATA COLLECTION AND USE



GUIDING PRINCIPLES

The Framework is designed around five guiding principles. These principles apply to all elements of engagement and data collection and should be infused into every step of the process to connect with the early childhood community.

- **Community-guided.** This means that community members' lived experiences are of the utmost priority. It involves a deep commitment to listening to and learning from those closest to young children and ensuring that their strengths, experiences, and realities are elevated, affirmed, and used to drive key decisions.
- **Equity-driven.** This means that equitable and inclusive approaches are fully embraced when engaging with communities—particularly those that have been historically marginalized and that are often furthest from opportunity. It requires actively working to eliminate barriers, bias, and discrimination so that all voices are heard, are valued, and contribute to meaningful change.
- **Ethical.** This means that the importance of consent, confidentiality, and intent are upheld. It requires thorough consideration of all data practices to center the interests of communities, reduce unintended consequences, and maximize impact.
- **Transparent.** This means that clear communication is valued. It involves dedication to maintaining a two-way relationship so that key information is shared with community members and clear pathways are created for them to share back their ideas, input, and feedback.
- **Responsive.** This means that ongoing learning and refinement of processes are intentional. It involves elevating the importance of continuous improvement as an essential part of efforts so that they align with and best meet the evolving needs of the early childhood community.

KEY ELEMENTS

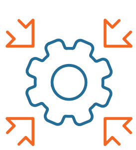
The Framework's key elements are essential in moving from concept to action. These elements offer intentional steps to guide effective qualitative data efforts while centering the importance of both methodological rigor and robust community engagement practices.

PLANNING

Setting the stage. Planning is an important first step—to intentionally consider what needs to be learned, whose voices should be heard, and how the community can meaningfully be engaged.

OUTREACH

Building trust and bridges. Outreach involves establishing trust with the community and developing strategies to authentically reach out and connect with community members.



COLLECTION

Elevating community voices. Collection is the heart of engagement, creating space for community members to directly share their experiences, needs, and perspectives.

ANALYSIS

Translating voices into insights. Analysis transforms raw narratives into actionable insights by interpreting the data collected to identify common themes and patterns.

ACTION

Amplifying community impact. Action makes sure findings are broadly shared back with the early childhood community and other interest holders and that there are clear pathways to inform decision-making.

INTENDED IMPACT

At the core of the Framework for Qualitative Data Collection and Use lies a vision of programming, policy, and decision-making that centers the voices of the early childhood community. Within this vision, North Carolina is a landscape where children's early years are shaped by research-based insights that incorporate the wisdom shared by families, educators, and community leaders. This vision unfolds into improved and more equitable opportunities for young children that are truly responsive to their needs and enable them to develop to their fullest potential.

ACTIONABLE GUIDE

Connecting With Communities and Putting Qualitative Data Into Action

HOW TO USE THE FRAMEWORK

The Framework for Qualitative Data Collection and Use is designed to serve as a roadmap for DCDEE staff and others interested in engaging with and learning from members of the early childhood community. The Framework provides guidance along with a range of tools to help collect various types of qualitative data, either independently or together with quantitative data. The overall intent of the Framework is to offer the support needed to develop a deeper understanding of community needs and inform future actions.

For each of the key elements of the Framework, the following section includes:

TIPS to outline best practices and other helpful suggestions

TOOLS to support the collection and use of qualitative data

EQUITY CHECKS

to reflect on your own beliefs, biases, and values as they relate to your effort

STORIES to share ideas and bright spots directly from the field

RESOURCES to provide more in-depth explorations of related topics

WHO CAN USE THE FRAMEWORK

The Framework tools can be used by anyone who is interested in better understanding the lived experiences of the community members they work with or represent. These might include DCDEE staff as well as leaders outside of DCDEE who are interested in using best practices in qualitative data collection. The Framework can be used solo by individual on the journey to listen and learn more about those around them. The Framework can also be used when working as part of a team, allowing for different people to collaborate and share their ideas and viewpoints to gain a deeper understanding of the topic at hand. Whether a DCDEE decision-maker hopes to inform new initiatives, an advocate seeks to support impactful changes in the early childhood system, or a committed local leader believes in the power of community stories to drive meaningful transformation, the Framework provides a comprehensive guide to making these aspirations a reality. It provides the support needed to amplify voices, drive change, and foster a collaborative environment where community insights contribute to a more equitable and responsive early childhood landscape.

TAKING THE FIRST STEP

Where to begin? Whether you are embarking on the complete journey or focusing on a singular element, the Framework can be adapted seamlessly to drive individual projects or collective goals forward. The resources and supports that follow can be used in different ways, depending on users' needs. You can decide to do any of the following:

- Start from the beginning, and work through this guide step-by-step.
- Jump into the section that best matches where you are currently with your qualitative data collection and use effort, and work from there.
- Select a few sections that correspond with ways you believe qualitative data efforts could be strengthened or expanded, and learn more.

PLANNING

Careful and meaningful planning before collecting qualitative data is just as important as the data collection itself. During this stage, those involved in data collection should thoughtfully consider what they hope to learn; how they will connect and engage with communities; and how they will gather experiences, feedback, and insights.

Planning can be done successfully as an individual, but there are also great benefits when working as part of a team. Building a team with members who offer a wide range of ideas, skills, and perspectives can help ensure the following:

- **Shared knowledge** is developed as team members contribute their unique strengths, skills, and expertise.
- **Diverse perspectives** are infused in the work, leading to more creative and innovative approaches and solutions.
- **Collaborative problem-solving** in groups can often be more efficient and effective than solo efforts.
- **Stronger results** are achieved when multiple minds are able to come together to review and validate the work.

INSIGHTS FROM THE COMMUNITY

In designing the Framework, important insights were shared by North Carolina's early childhood community to consider when engaging in qualitative data collection and use. These findings informed the following content and may be helpful to keep in mind as you implement your efforts.

WHAT WE HEARD

The Division provides different opportunities to share feedback, but early childhood community members are not always aware of them and don't always participate.

WHAT WE HEARD

Early childhood community members want different options for sharing their stories and want to be met where they are.

WHAT CAN BE DONE

Develop additional approaches for collecting and using community members' stories and feedback.

Bringing multiple people together also creates more opportunity to ensure that planning (as well as, ultimately, the broader effort) is conducted in ways that are most inclusive and responsive to the context. When creating teams, it may be important to assess the diversity and representation of your group to ensure it reflects those who will be most impacted by the work. If you are working individually, it will be important to find other ways to assess your plan to make sure it responds to the different cultures, languages, abilities, and other key characteristics of those you intend to connect with and serve.

With either approach, when you take the time to plan, you help to ensure the effort will be most successful by establishing a clear purpose, maximizing resources, and effectively leveraging your work each step of the way.

TIPS

Consider the following when planning for data collection:

- **Clarify the purpose and set objectives.** At the start of the planning stage, clarify the purpose of the data collection and the type of information needed from the community. You can generate a list of questions you want to answer (i.e., research questions), or you can create something more broad like a purpose statement. Either way, make sure the purpose is clear and provides direction for the work throughout the duration of data collection.

- **Leverage data and research that already exist.** Inform yourself of any data collection efforts currently underway or that have been done previously—particularly efforts that include the communities and populations you are trying to reach. It is important to be aware of duplicating efforts, as you do not want to burden communities with repeated questioning about the same issues. Aligned data also may be available and provide an opportunity to build on existing knowledge. It can be beneficial to review any related data and research that might be able to inform your current efforts.

- **Reflect on the bidirectional relationship of quantitative and qualitative data.** You might see important trends or patterns through existing quantitative data (the numbers) that you could further explore and unpack with qualitative data (the community stories). Or the qualitative data you collect could be further corroborated and supported with quantitative data. The planning stage is a good time to reflect on how both quantitative and qualitative data might inform your efforts along the way, from setting your purpose and research questions to contextualizing your findings.

- **Identify the participants.** Reflect on which communities and who within these communities can represent the insights, input, and experiences you want to highlight. Be sure to think about whose voices are not often heard or haven't been heard at all to help you determine who might help you answer your research questions. As mentioned previously, being familiar with existing data collection efforts—as well as connecting with trusted community members—can help identify those you may need to hear from.

- **Choose your methods.** Familiarize yourself with the various methods of qualitative data collection, such as focus groups, listening sessions, interviews, open-ended surveys, PhotoVoice, and storytelling. Learn the nature of the data you will gather for each method and how each method can help to elevate the lived experiences of communities. As you explore the various methods, consider the nuances of each qualitative method and its suitability for capturing stories, experiences, and feedback from the community. Decide which methods are most appropriate for engaging your participants.

- **Always prioritize ethical data collection practices.** Understand the ethical considerations that come with engaging with community members. When planning for data collection, ensure that you have the resources to keep data private and confidential and that respect for participants is maintained throughout the process. Make sure that information regarding data collection and how participants' feedback will be used is clearly shared and that participants give informed consent. When conducting research with human participants, you may need approval from the Institutional Review Board (IRB), a committee or group established to ensure that the rights and welfare of research participants are protected. The IRB is responsible for reviewing the appropriateness of research methods and determining whether they are ethical. Starting in the planning stage, it's important to consider all next steps to ensure that ethical data collection practices are being used throughout the effort.

- **Create a realistic timeline.** Establish a timeline for engagement activities and ensure that there is sufficient time for planning, data collection, and analysis. Carefully consider your and others' availability to recruit participants, complete data collection activities, and review and synthesize your collected data. You may face obstacles such as low participation rates, cancellations, or even a need to extend your data collection window. Therefore, you should allow for flexibility in your timeline to ensure that all tasks keep moving despite obstacles.

- **Check your resources.** Ensure that you have the necessary resources to execute your data collection efforts effectively. This check includes understanding the availability of staff with time to support data collection activities. Additionally, make sure you know which data collection materials (e.g., laptops, recording devices, cameras, printed materials) are needed, as well as your anticipated budget. The availability of resources can directly impact your ability to complete your data collection, so it is imperative to plan accordingly.

EQUITY CHECK

Closely examine your plans to ensure that they are accessible to all participants. This check includes considering the demographic diversity (e.g., age, gender, ethnicity, language, socioeconomic status, ability) of members of your community or those who are the focus of your qualitative data collection effort. We have learned that community members want more than one way to share their stories and want to be met where they already are. Thus, it is important that the methods and modalities chosen allow all communities to share their experiences without major barriers. Take steps to ensure that populations that have been historically and systemically denied access to sharing their feedback and insights are meaningfully represented.

STORIES

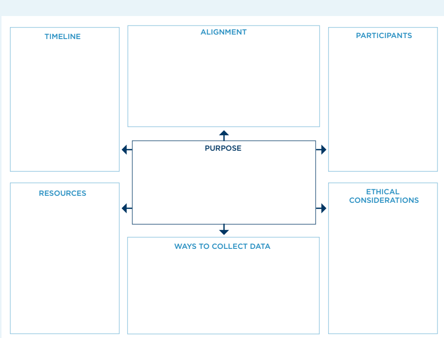
Please watch the video to learn more about planning in action. Successes, lessons learned, and other tips are shared directly from those doing the work in the field.

TOOLS

The tools in this section were designed to support planning for your effort.

PRIMARY TOOL

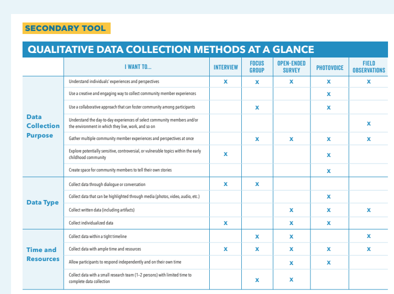
Planning Template LINK



OTHER HELPFUL TOOLS

SECONDARY TOOL

Data Collection Methods at a Glance LINK



SECONDARY TOOL

QUALITATIVE DATA COLLECTION METHODS AT A GLANCE

	I WANT TO...	INTERVIEW	FOCUS GROUP	OPEN-ENDED SURVEY	PHOTOVOICE	FIELD OBSERVATIONS
Data Collection Purpose	Understand individuals' experiences and perspectives	X	X	X	X	X
	Use a creative and engaging way to collect community member experiences				X	
	Use a collaborative approach that can foster community among participants		X		X	
	Understand the day-to-day experiences of select community members and/or the environment in which they live, work, and so on					X
	Gather multiple community member experiences and perspectives at once		X	X	X	X
	Explore potentially sensitive, controversial, or vulnerable topics within the early childhood community	X			X	
	Create space for community members to tell their own stories				X	
Data Type	Collect data through dialogue or conversation	X	X			
	Collect data that can be highlighted through media (photos, video, audio, etc.)				X	
	Collect written data (including artifacts)			X	X	X
	Collect individualized data	X		X	X	
Time and Resources	Collect data within a tight timeline		X	X		X
	Collect data with ample time and resources	X	X	X	X	X
	Allow participants to respond independently and on their own time			X	X	
	Collect data with a small research team (1–2 persons) with limited time to complete data collection		X	X		

Please watch THIS VIDEO for a brief walkthrough of the tools.

RESOURCES

Check out these resources to learn even more about this step of the process:

Ethical Storytelling Principles, from Voice of Witness. This brief article offers key considerations that researchers and all those who plan to learn from communities can lead with to prevent causing unintended harm. Considering these principles at the planning stage can help to ground qualitative data efforts in values of respect, empathy, and equity.

A Toolkit for Centering Racial Equity Throughout Data Integration, from Actionable Intelligence for Social Policy. This toolkit is designed to shift awareness and practice by centering racial equity and community voice within the context of data integration and use. Those who lead qualitative data efforts can utilize these tools to plan for data collection and integration that support power sharing and building across agencies with community members.

Qualitative Research Methods: A Data Collector's Field Guide, from Family Health International. This learning module provides an overview of qualitative research methods, which can help in selecting and planning for data collection methods that suit their purpose, lead to valid and meaningful findings, and adhere to ethical guidelines.

The Data Equity Framework, from the We All Count project for equity in science. This framework breaks down any data research project into seven stages. Within each stage, the framework provides key equity decision points, tools, and practices designed to help you make intentional choices that achieve the equity goals you have identified for your work.

Pick a Topic and Develop a Good Research Question, from the College of Staten Island. These two worksheets provide helpful reflection questions to assist in narrowing and choosing your research topic, as well as deciding on a set of research questions that will guide the rest of your data collection process.

Conducting a Literature Review, from the State University of New York at Cortland. This three-page overview provides a comprehensive summary of the literature review process, including the purpose, scope, and common pitfalls to be aware of. This is an important step in the data collection process to gain awareness of data and research that already exist and to avoid duplication of effort.

Racial Equity Tools (Evaluate). This website offers a comprehensive suite of resources on a variety of topics related to organizational and systems change for equity. In particular, the segment dedicated to evaluation offers guidance, tools, and resources for each step of the research process, from defining the work to sharing findings and reflection.

Distinguishing Research and Data Equity from Justice, from Northwestern University's Feinberg School of Medicine. This recorded webinar unpacks the differences between data and evaluation initiatives that are grounded in equity and those that center justice, as well as the limitations of data and evaluation initiatives. The webinar can help viewers clarify their broader intentions for qualitative research and align their efforts accordingly.

OUTREACH

Building trust and fostering familiarity is essential when shifting toward centering communities and their lived experiences. Members of North Carolina's early childhood community expressed the importance of engaging with trusted individuals and being met where they are comfortable. The outreach stage serves as a critical opportunity to establish the trust and relationships with communities necessary to conduct successful qualitative data collection. A more meaningful outreach experience lays the groundwork for authentic and sincere engagement, which in turn encourages community members to share their perspectives willingly.

For outreach to be most effective, it is important to develop a strategy for reaching members of the community to help you plan for your data collection, to participate in it, or both. Your outreach strategies should be well crafted and tailored to the specific needs of the community and its members. Additionally, when strategizing how you will engage the community, you should take into account the community's culture, traditions, historical context, and preferences.

It can also benefit your outreach and recruitment to connect with trusted community advisors, leaders, or members of the community to support or even lead outreach and recruitment activities. These individuals or organizations could leverage their relationships and knowledge of the community to help identify potential participants for your data collection. They could also inform outreach and communication methods to ensure they are responsive to the culture and language of those you want to engage. Additionally, they could help develop effective outreach strategies to engage community members who may not usually be involved in these types of efforts but who have valuable knowledge and expertise to contribute. As a result, it may be important to plan in advance with your team before engaging community members, to ensure that your reach is broad and inclusive.

INSIGHTS FROM THE COMMUNITY

In designing the Framework, important insights were shared by North Carolina's early childhood community to consider when engaging in qualitative data collection and use. These findings informed the following content and may be helpful to keep in mind as you implement your efforts.

WHAT WE HEARD

The Division has heard mostly from early childhood directors and administrators. Other community members faced barriers that kept them from sharing their perspectives.

WHAT CAN BE DONE

Increase outreach efforts and address barriers to ensure diverse voices are heard.

WHAT WE HEARD

Early childhood community members want to share feedback with those they trust.

WHAT CAN BE DONE

Work to develop trust with community members.

TIPS

Consider the following when creating your outreach strategy:

- **Share your purpose.** From the start, be honest with community members about the purpose and intentions of your outreach. This is can be particularly relevant when using more tailored outreach (or what some may call "recruitment") strategies that focus on reaching out and inviting members from a specific population or community to participate. Remember, you want to build genuine, trusting relationships within the community, and being honest, clear, and transparent about the activities and their potential impact on the community can support successful relationship building.

- **Engage trusted advisors of the community.** Take steps to involve the community and connect with trusted leaders when thinking about outreach strategies. Find meaningful opportunities to partner with community organizations that can share insight, lend support, and also give you credibility within the community. This, of course, will require the additional work of becoming familiar with the community if you are not already. Building those genuine, trusting relationships will be an important basis for this effort.

- **Use multiple communication tools.** Not all communication methods will be convenient, and not all community members will respond to all communication methods and attempts. So, it is important to include a variety of communication tools in your outreach strategy, such as phone calls, text messages, emails, social media, apps, websites, and newsletters. Asking trusted community leaders and organizations to make direct personal connections and invitations is often more effective than having communications come from a person community members may not know. It is also important to understand the pros and cons of your communication tools and to know when to pivot. Leverage the wide reach of these varying platforms, but also be aware of potential limitations in terms of inclusivity and information accuracy.

- **Make sure events and meetings are convenient for a variety of community members to attend.** If you are planning to coordinate or collaborate for an in-person outreach event, schedule meetings and other events for times and locations that work best for the community, including families. Take into account and plan to provide support families may need to attend, such as transportation, child care, and meals.

EQUITY CHECK

Ensure that your outreach efforts promote equitable engagement. Always make efforts to involve underrepresented populations, such as Family Child Care Home Providers and families in rural areas. Doing so may require additional time and resources. So, create strategies to ensure that all populations have an opportunity to contribute meaningfully.

STORIES

Please watch the video to learn more about outreach in action. Successes, lessons learned, and other tips are shared directly from those doing the work in the field.

TOOLS

The tools in this section were designed to support outreach for your effort.

PRIMARY TOOL

Outreach Plan Worksheet [LINK]

WHO	WHAT	WHERE	HOW	WHEN
Which people do we need to hear from the most? Which other people do we need to hear from? Who from the community might be able to support us in our effort?	What do we know or what have we learned about the community members we want and need to hear from? Have we previously had successes, challenges, or both in reaching out to community members? What are our limitations?	Where do our community members most frequently spend time? Where do community members feel most comfortable? How can we navigate these spaces respectfully?	Given what we know, which communication methods do we think will be most effective in reaching community members? What communication materials will we need for outreach to be successful?	What is our timeline for outreach for us to keep the project on track? How might that timeline align with or impact what is already happening in the community?

Check out this additional tool – Choosing an Outreach Method – to help you prepare for outreach.

OTHER HELPFUL TOOLS

SECONDARY TOOL

Choosing an Outreach Method [LINK]

SECONDARY TOOL

CHOOSING AN OUTREACH METHOD

METHOD	ADVANTAGES	LIMITATIONS	EXAMPLES
Email and newsletters	• Can be an effective and easy way to reach a large number of community members in a short amount of time. • Personal email addresses do not change often, and email can reach your contacts wherever they are.	• Not all community members have consistent access to the internet or their email. • Some people do not consistently check their email. • If you are not a known or trusted contact, your emails may be ignored or flagged as spam or a scam!	Email Communication Examples
Mail	• Provides another option to reach community members. • Some community members may respond more favorably to outreach that is in hand.	• Maintaining up-to-date mailing addresses can be a challenge. • Traditional snail mail may be overlooked as junk mail.	Mailer Example
Social media	• There are a variety of social media platforms to use for outreach, such as Facebook, X (formerly Twitter), Instagram, and TikTok. • Can easily partner with local community organizations or leaders who have social media presence to post your outreach. • Once content is developed, the outreach can quickly reach a wide range of people.	• Social media is open to everyone, including scammers! They can fraudulently sign up to participate in your data collection activities and ultimately jeopardize your data.	Social Media Examples

Please watch THIS VIDEO for a brief walkthrough of the tools.

RESOURCES

Check out these resources to learn even more about this step of the process:

Equitable Community Engagement Toolkit, from the City of Philadelphia. This website, designed to align the ways city agencies engage the community for a variety of purposes, contains discussions on key topics such as how to make decisions alongside the community, how to ensure accessibility of engagements, and more. The website offers downloadable templates to support outreach, meeting planning, and other key facets of community engagement.

How to Reach Families Without Internet Access, from Forthright Advising. This resource offers detailed information about how to reach community members who lack access to or choose not to participate in online communications such as email and social media. It offers five alternative methods of reaching such audiences along with best practices for each method.

Strategies for Outreach to Families With Limited English Proficiency, from the National Center on Parent, Family and Community Engagement. This resource, while not specific to outreach for the purpose of engaging in qualitative research, offers evidence-based strategies for family and community engagement that are inclusive of families with limited English proficiency. The resource offers clear examples of best practices to build a community outreach approach that is respectful, reciprocal, and responsive.

Community Engagement Toolkit, from the National Resource Center for Refugees, Immigrants, and Migrants at the University of Minnesota. This resource offers guidance about communicating with and involving the communities served by public health and education initiatives. While the content and examples heavily reflect COVID-19 and other public health issues, the principles and practices (i.e., utilizing trusted community messengers, creating community advisory boards, etc.) are highly transferable to a variety of community-based research initiatives.

Family Engagement and Leadership Framework, from the Smart Start network. This framework provides a structured approach for family-centered and family-led work, facilitating agencies and programs to engage with primary adults in a child's life and support their leadership development for advocating for children, themselves, and system improvements. The Guiding Principles serve as benchmarks for prioritizing family engagement and leadership within organizations, enabling local partnerships and coalitions to assess their practices and guide parents in their interactions with family-serving agencies.

COLLECTION

As you transition into the data collection phase, you're embarking on the core of your community engagement journey. This is where you delve into the "how" and "why" behind the stories and experiences you've been gathering. To do so, you'll utilize a range of methods, including surveys, focus groups or listening sessions, interviews, and PhotoVoice, which are all designed to capture the unique perspectives and insights of your community. Within each of these methods, there are various strategies and best practices that can be used to ensure that the voices of the community are centered and elevated.

INSIGHTS FROM THE COMMUNITY

In designing the Framework, important insights were shared by North Carolina's early childhood community to consider when engaging in qualitative data collection and use. These findings informed the following content and may be helpful to keep in mind as you implement your efforts…

WHAT WE HEARD

Early childhood community members want to share stories about lived experiences and how polities impact practice and people "on the ground."

WHAT CAN BE DONE

Provide opportunities for early childhood community members to share stories and lived experiences to inform decision-making.

Qualitative data collection methods

- **Interviews** are typically one-on-one conversations that create more intimate environments for community members to share information. Interviewees may feel more comfortable sharing sensitive or vulnerable topics during a one-on-one interview.

- **Focus groups** are small group discussions that can help you gather in-depth, honest, and nuanced information. The group discussion format provides community members the opportunity to share openly, build on one another's perspectives, and share what they are thinking or feeling. Focus groups and listening sessions are usually led by a facilitator or facilitation team (1–2 persons) who facilitate the discussion by asking relevant questions.

- **Surveys** can ask respondents open-ended questions in a way that can allow you to gather experiences, stories, and feedback from individuals in the early childhood community. Respondents may be provided space to respond openly without being limited to preselected answer choices.

- **PhotoVoice** seeks to address a particular issue by giving cameras to people who are directly affected by that issue, so that they can document and communicate their experience through their own lens. The resulting photographs may be exhibited for public display, such as in a report or memo, in an effort to engage the community in dialogue and facilitate positive change.

- **Observations** can be used when you want to explore, gain an in-depth understanding of, and document an environment, behaviors, and interactions. Observations can be fluid, or they can be more structured and guided by a set of guiding questions or prompts.

Whatever approach you take, this phase represents a crucial opportunity to connect with community members, dig deeper into the narratives that will offer a more nuanced understanding of lived experiences, and provide the information needed to inform future decision-making and actions.

TIPS

Consider the following when conducting data collection activities:

- **Ensure that the chosen methods are still the best methods to answer the research questions.** As planning and preparation for data collection evolve, check to make sure the data collection methods originally chosen are still the most appropriate. It is important that the selected methods will ultimately lead to answers for the guiding or research questions and that they are still the best fit for the community members who will be engaged during data collection. The best methods are those that will allow you to maximize your resources—and, more important, participants' time—by collecting data in the most efficient and effective ways.

- **Develop cohesive facilitation or protocol guides to support your data collection.** It is beneficial to create consistent guidance or a protocol for the data collection activities. This can be in the form of a written document or guide that outlines the appropriate steps leading up to, during, and after a data collection activity. It can also provide guidance on administering or facilitating selected data collection methods, as well as suggested language to use when communicating with community members. When multiple persons will support data collection, a facilitation or protocol guide can ensure some consistency among the team if all follow the same guidance.

- **Make sure all community members consent to data collection activities.** Participants must be asked for consent prior to any data collection. To maximize transparency and obtain informed consent, participants should be given the details of the data collection, what is being asked of them, and how the information they share will be used. Consent can be obtained both orally and through written forms. Some populations, such as immigrants and refugees, may be reluctant to provide written consent and prefer to give verbal consent to participate. Consent should be requested again just before the actual data collection activity. For example, at the start of an interview, the facilitator may detail the process of the interview and ask whether the participant agrees to participate based on the information provided by the facilitator. At that moment, the community member can agree to continue or opt out. It is important that when consenting, community members have accurate and truthful information so they can make informed decisions about their participation.

- **Ensure that data collection activities are accessible to all members of the community.** To ensure that multiple and varied perspectives are heard during data collection, data collection activities should be accessible and made available to a wide variety of community members. Ensuring accessibility can include offering a translator or translated materials, offering multiple survey formats (e.g., paper, web-based/electronic, and phone), offering virtual or phone alternatives for in-person activities, or ensuring in-person locations are accessible for community members of all abilities.

- **Demonstrate that you are trustworthy.** Share both written and verbal information about yourself, your organization (branch), the data collection activity, and how the data or information gathered will be used. The information shared should be clear, easy to read, and translated for primary languages other than English. Always provide at least one contact for questions and concerns. Demonstrate for community members that communication is open and they can contact you at any point during the research. (If an IRB is being used, you may be required to share information about it so participants can get in touch with the IRB directly to share any potential concerns.)

- **Work to collect the actual data.** Once data collection has commenced, it is important to be prepared for the amount of data, such as written and audio recorded data, that will exist as the data collection cycle progresses. With methods such as interviews, focus groups, and sometimes observations, a reliable (and tested) recording device is usually used to record audio, which is then transcribed. Whether you are internally transcribing audio or sending it to a transcription service, ensure that adequate time is allotted for this process, as each hour of recording can take up to two or three hours to transcribe. When transcription is completed, files should be labeled, organized, and securely stored with other collected data.

- **Plan for interim or midpoint check-in(s).** Depending on the length of time data will be collected, it is advantageous to plan to meet at a midpoint in the data collection to check in and reflect about how the data collection activities have been proceeding up to that point. A midpoint check-in can create a space to pause and reflect on findings so far, to ask questions, and to address any challenges and think through any needs to shift data collection plans.

- **Ensure privacy and confidentiality.** Systems must be put into place to ensure that all information collected from community members during outreach and data collection is kept private and secure. This includes using password-locked computers, creating private folders, and removing names and other confidential information from collected data. Emphasize to participants how you will ensure that their information and data, written and verbal, will be kept private and secure. This assurance should be provided during the outreach stage and during data collection activities. Privacy and confidentiality protocols should also be shared again verbally just before the start of any data collection activities such as interviews and focus groups.

- **Communicate regularly.** Keep the community—and particularly those who are participating or who have participated in data collection activities—in the loop on what is happening with the data collection. Some examples of ways to communicate are biweekly emails or texts to update on data collection timelines, midpoint memos, or data collection findings and updates.

EQUITY CHECK

It is important to remember that the community members you engage during data collection are the experts. Their unique knowledge and lived experiences give them the expertise to inform your work. During data collection, keep in mind how you can mitigate power dynamics to create authentic space for participants to share their stories.

STORIES

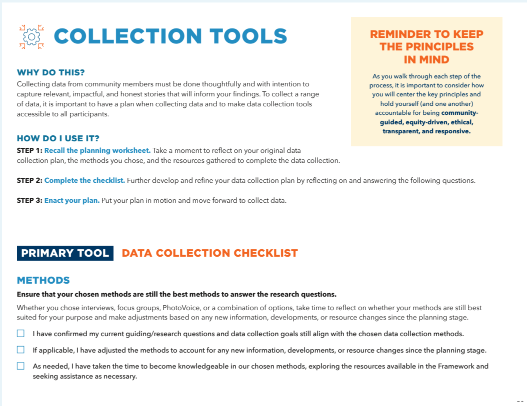
Please watch the video to learn more about data collection in action. Successes, lessons learned, and other tips are shared directly from those doing the work in the field.

TOOLS

The tools in this section were designed to support data collection for your effort.

PRIMARY TOOL

Data Collection Checklist [LINK]



COLLECTION TOOLS

WHY DO THIS?

Collecting data from community members must be done thoughtfully and with intention to capture relevant, impactful, and honest stories that will inform your findings. To collect a range of data, it is important to have a plan when collecting data and to make data collection tools accessible to all participants.

HOW DO I USE IT?

STEP 1: **Recall the planning worksheet.** Take a moment to reflect on your original data collection plan, the methods you chose, and the resources gathered to complete the data collection.

STEP 2: **Complete the checklist.** Further develop and refine your data collection plan by reflecting on and answering the following questions.

STEP 3: **Enact your plan.** Put your plan in motion and move forward to collect data.

REMINDER TO KEEP THE PRINCIPLES IN MIND

As you walk through each step of the process, it is important to consider how you will center the key principles and hold yourself (and one another) accountable for being **community-guided, equity-driven, ethical, transparent, and responsive.**

PRIMARY TOOL DATA COLLECTION CHECKLIST

METHODS

Ensure that your chosen methods are still the best methods to answer the research questions.

Whether you chose interviews, focus groups, PhotoVoice, or a combination of options, take time to reflect on whether your methods are still best suited for your purpose and make adjustments based on any new information, developments, or resource changes since the planning stage.

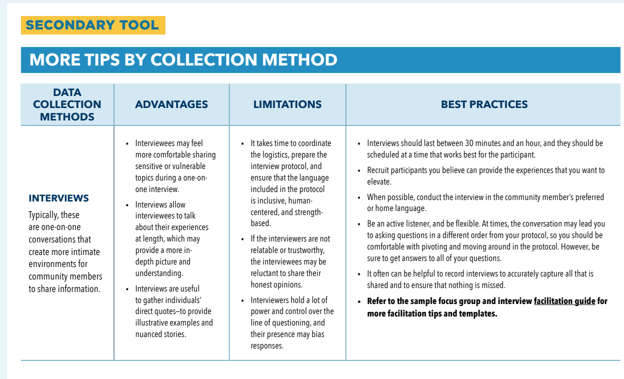
- ☐ I have confirmed my current guiding/research questions and data collection goals still align with the chosen data collection methods.
- ☐ If applicable, I have adjusted the methods to account for any new information, developments, or resource changes since the planning stage.
- ☐ As needed, I have taken the time to become knowledgeable in our chosen methods, exploring the resources available in the Framework and seeking assistance as necessary.

OTHER HELPFUL TOOLS

SECONDARY TOOL

More Tips by Collection Method

[LINK]



SECONDARY TOOL

MORE TIPS BY COLLECTION METHOD

DATA COLLECTION METHODS	ADVANTAGES	LIMITATIONS	BEST PRACTICES
INTERVIEWS Typically, these are one-on-one conversations that create more intimate environments for community members to share information.	• Interviewees may feel more comfortable sharing sensitive or vulnerable topics during a one-on-one interview. • Interviews allow interviewees to talk about their experiences at length, which may provide a more in-depth picture and understanding. • Interviews are useful to gather individuals' direct quotes–to provide illustrative examples and nuanced stories.	• It takes time to coordinate the logistics, prepare the interview protocol, and ensure that the language included in the protocol is inclusive, human-centered, and strength-based. • If the interviewers are not relatable or trustworthy, the interviewees may be reluctant to share their honest opinions. • Interviewers hold a lot of power and control over the line of questioning, and their presence may bias responses.	• Interviews should last between 30 minutes and an hour, and they should be scheduled at a time that works best for the participant. • Recruit participants you believe can provide the experiences that you want to elevate. • When possible, conduct the interview in the community member's preferred or home language. • Be an active listener, and be flexible. At times, the conversation may lead you to asking questions in a different order from your protocol, so you should be comfortable with pivoting and moving around in the protocol. However, be sure to get answers to all of your questions. • It often can be helpful to record interviews to accurately capture all that is shared and to ensure that nothing is missed. • **Refer to the sample focus group and interview facilitation guide for more facilitation tips and templates.**

Please watch THIS VIDEO for a brief walkthrough of the tools.

RESOURCES

Check out these resources to learn even more about this step of the process:

GENERAL BEST PRACTICES:

Tips for Writing Consent Forms, from Texas A&M University; and **Informed Consent Template**, from School Readiness Consulting. These resources are designed to obtain informed consent prior to data collection as part of a broad commitment to ethical qualitative research practices.

Oral/Verbal Consent, from the University of Virginia. This web page, with a short video, discusses the definition of verbal consent and when to use it appropriately based on Institutional Review Board (IRB) guidelines.

Compensation for Participation in Research, from the University of Oregon's Office of the Vice President for Research and Innovation. This resource offers guidance to assist in planning for compensation to participants in ways that adhere to ethical guidelines and in communicating effectively with participants about compensation.

Tips and Tools for Remote Qualitative Data Collection, from the North Carolina Translational and Clinical Sciences Institute at the University of North Carolina School of Medicine. This toolkit offers helpful tips for preparing and conducting virtual interviews and focus groups, including technology options, participant preparation, and a sample verbal consent script.

FOR INTERVIEWS:

Strategies for Qualitative Interviews, from Harvard University's School of Sociology. This short guide provides tips for a successful interview as well as a step-by-step guide to writing interview questions.

FOR FOCUS GROUPS:

Family Narrative Toolkit, from School Readiness Consulting. This guidebook offers step-by-step guidance and practical tools for planning, preparing, and executing focus groups and group listening sessions with families and community members. Included in the guidebook are tips for developing effective discussion protocols that access all voices at the table and draw on the expertise and lived experience of the discussants.

Conversation Café, a collaborative discussion format from Liberating Structures. This web page describes in detail how to facilitate a "conversation café," a format designed to promote open sharing and listening, as a group of people reflect together on an issue that impacts the community. As people discuss the connections between their own experiences and perspectives, the seeds of potential solutions or actions emerge without the barrier of unproductive conflict.

FOR SURVEYS:

Writing Survey Questions, from the Pew Research Center. This article provides an overview of survey development, including how to use surveys to measure change over time and the difference between open- and closed-ended questions, as well as a video explaining the critical nature of question wording.

The Steps in Designing a Survey Project, from Creative Research Systems. This web page provides five main steps for designing a quality survey. It includes helpful details about avoiding a biased sample and considerations for the layout of your survey. This resource also provides an overview of the different ways to administer a survey: in person, online, by telephone, or by mail.

FOR PHOTOVOICE:

Implementing PhotoVoice in Your Community, from Community Tool Box, a service of the Center for Community Health and Development at the University of Kansas. This guide explores the usefulness and best practices associated with participatory action research activities such as PhotoVoice. It offers step-by-step guidance, tips on effective implementation, and examples to help set a vision for how PhotoVoice can help you to learn with and from your community.

Facilitator's Toolkit for a PhotoVoice Project, from United for Prevention in Passaic County and the William Paterson University Department of Public Health. This facilitator's guide provides an overview of how to implement a PhotoVoice project, including the who, what, where and why. The guide also has helpful tools such as a proposed timeline, sample consent form, and photography tips.

FOR OBSERVATIONS:

Conducting a Good Observation, from John W. Creswell (2016), *30 Essential Skills for the Qualitative Researcher.* This chapter focuses on developing the skills for qualitative observations. The chapter presents comprehensive steps in the process of observing, from choosing the research site to withdrawal. The chapter provides a sample observation protocol and articulates common challenges when conducting observations.

ANALYSIS

During data collection, themes have likely begun to emerge from your engagement with the early childhood community. However, it is important to stop, dig into the data, and analyze what has been collected and learned. This effort involves several steps and strategies to ensure that the team has a common understanding of what was learned and to make connections to what the team already knows. Avoid the temptation to move too quickly to think about action—ensure that you have the information and understanding you need first.

TIPS

Consider the following when analyzing qualitative data:

- **Organize the data and create a system for working through the data.** Whether you are working with small amounts of data or large, it benefits the work to organize all of your information, including data such as outreach lists, participant lists and demographic information, transcripts and notes, and survey responses. Tools such as Google Sheets and Excel are helpful in creating a central location to keep all information organized.* Ensure that data is organized in a way that will allow you to track back when sorting through the data. Additionally, the data should be cleanly organized and clearly labeled in case another person needs to take over.

- **Review and "clean" the data.** To ensure the data is accurate and complete, it is important for all data to be reviewed and "cleaned." This process entails checking for errors, missing or incomplete data, duplicate data, or generally erroneous data. This is one of the most important steps to ensure the accuracy of the information that is shared, particularly information that will inform decision-making.

- **Ensure privacy and confidentiality.** You may be tempted to disclose specific details of what was shared with you or your team to other community members or staff you work with, especially if the information is relevant to them. However, it is important to keep details about what specific participants shared confidential. During the analysis stage, if names have been shared, they should be removed from the data not only to avoid potential bias but also to respect and protect the participants. It may be more beneficial to share data once it has been elevated into themes and to include direct quotes (without names or specific roles unless you have permission or consent from the participant) to support the themes.

- **Use analysis tools to support the data analysis stage.** Manually reviewing, organizing, and analyzing data can be very time-consuming and susceptible to human error. In some cases, it can benefit the work to use software such as NVivo, Atlas.ti, or Dedoose to support such tasks as coding and categorizing transcripts and survey data. Alternatively, Microsoft Excel and Google Sheets can also be helpful tools for color coding, filtering, and organizing for analysis.* When considering tools to use for analysis, be mindful of the amount of time it may take to learn and adapt to new tools.

* Please ensure that any platforms used (e.g., Google Sheets, Microsoft Excel, NVivo, etc.) with qualitative data are approved by and follow DCDEE privacy guidelines.

- **Identify the key themes in the collected data.** Whether you are analyzing data manually or using analysis software, create a coding system so you can synthesize repeating topics or themes into overarching key themes that emerge as you sift through the data. These key themes may include shared experiences, concerns, or highlights in the community. Note that though it is possible to notice certain themes or repeated topics during data collection, it is important to thoroughly sift through all of the collected data to see whether other themes emerge from what community members shared and to ensure that these themes are not missed.

- **Interpret the findings.** Ensure that time is invested in reviewing and understanding the findings of the analysis. When interpreting the findings, use important context—such as participants' community roles, the political climate, or community current events—to support your understanding of what was shared by the community. If possible, it is beneficial to gather a team of staff or community members who have a role in this work to help provide relevant context and interpret the findings together. Additionally, before finalizing findings, create a feedback loop by sharing the drafted findings with community members to confirm that the findings are an accurate representation.

- **Corroborate with quantitative data, if available.** When we look at the information we gather from the community, we also want to think about how often experiences happen or how many people are affected (that's the quantitative data). Putting this type of data together with the actual stories that were told (qualitative data) helps us get a fuller picture. For example, if many parents tell you about challenges they face in finding quality child care, the numbers can help you and the reader of your findings see how widespread this issue is. This mix of stories and numbers helps us make better decisions and drive actions that really work for everyone in the community.

EQUITY CHECK

Pay attention to who is involved in the sensemaking from data. Ensure that your processes are inclusive, and consider involving external community members and beneficiaries who can be invited to provide their own understanding and feedback about what the findings mean. Taking the time to ensure thoughtful representation in the analysis of what has been learned through feedback loops with families, providers, and other beneficiaries in the community can create a more complete understanding of findings and potential actions to be taken, guard against unintended consequences, and ultimately lead to more equitable decision-making and action.

STORIES

Please watch the video to learn more about data analysis in action. Successes, lessons learned, and other tips are shared directly from those doing the work in the field.

TOOLS

The tools in this section were designed to support analysis for your effort.

PRIMARY TOOL

Data Analysis Worksheet [LINK]

PRIMARY TOOL DATA ANALYSIS WORKSHEET

DISCUSSION QUESTIONS	NOTES
ORGANIZE **How should we organize data so that it is manageable for analysis?** Before you can properly analyze, clearly label all data and files and organize data in a manageable format (e.g., by date, by question asked, by participant characteristics). Doing so will allow you to find patterns and themes more easily later on.	
REVIEW AND CLEAN **What process will be implemented to thoroughly review and clean data?** "Cleaning" data means checking for errors, missing or incomplete information, duplicate data, or mislabeled data. For survey data specifically, this can mean reviewing each row of data and checking for erroneous entries.	
CHECKING BIAS **When analyzing data, how will we ensure that we stay true to the voices of community participants without imposing our own biases?** In qualitative data collection, reflecting on one's own identity and how that may impact the interpretation of findings is an ongoing process throughout the analysis stage. This can include inviting multiple coders to compare interpretations and/or collecting and analyzing multiple sources of data to corroborate results.	

Please watch THIS VIDEO for a brief walkthrough of the tools.

OTHER HELPFUL TOOLS

SECONDARY TOOL

Data Analysis Journey Map [LINK]

SECONDARY TOOL

QUALITATIVE DATA ANALYSIS – STEP-BY-STEP GUIDE

Follow these steps to analyze all data collected and draw your conclusions.

	1 DIGITIZE & UPLOAD	2 FAMILIARIZE
DESCRIPTION OF STEPS Follow these steps to analyze all data collected and draw your conclusions.	Begin by making sure all your data has been uploaded to your chosen online platform or prepared for manual analysis. This may include transcribing recordings or uploading and storing photographs.	Get to know your data well by reading or listening to it multiple times. Begin to mentally note potential patterns.
ANALYSIS EXAMPLE You are conducting a qualitative research project with the research question: How do early childhood educators implement new teaching strategies in diverse early childhood education settings? You've conducted interviews and completed a PhotoVoice project with early childhood educators about their experiences implementing new teaching strategies.	**ANALYSIS EXAMPLE** Start by transcribing, or typing up, the interviews and uploading the images captured. These files will then be uploaded to a secure database or software designed for qualitative analysis.	**ANALYSIS EXAMPLE** Read through the transcriptions multiple times to get a sense of the content. Look at each picture and begin to note any overlapping patterns across both types of data (interviews and PhotoVoice).

SECONDARY TOOL

Unpacking Your Findings Worksheet [LINK]

	WHAT? (What are the facts? What did we learn?)	SO WHAT? (What patterns or themes do we see across findings? What hypothesis can we make?)	NOW WHAT? (Where is this pointing us? What should be prioritized?)
[Research Question 1]			
[Research Question 2]			
[Research Question 3]			
[Research Question 4]			

RESOURCES

Check out these resources to learn even more about this step of the process:

Verna Myers: How to Overcome Our Biases? Walk Boldly Toward Them. This TED talk from Verna Myers discusses how we can begin to overcome our biases and "walk toward our discomfort." It is important to understand and mitigate our biases as we interpret others' stories.

Analyzing Community Problems, from Community Tool Box, a service of the Center for Community Health and Development at the University of Kansas. This guide breaks down the what, why, when, and how of analyzing data about community challenges presented through qualitative research methods such as focus groups and interviews. It offers a disciplined and comprehensive analysis approach that can lead to a better understanding of the complex system of root causes and to informed and effective action toward solutions.

Tool for Applying an Equity Lens to Qualitative Data Analysis, from DeYoung Consulting Services. This tool provides guidelines to consider when analyzing qualitative data particularly through an equity lens. It reviews why an equity lens is important for a researcher and gives brief illustrations of how the tool can be used.

Principles for Advancing Equitable Data Practices, from Urban Institute. This brief defines three principles: beneficence (the commitment to maximizing benefit to participants while minimizing harm); respect for persons (the responsibility to uphold people's power to make decisions in their own best interests and to protect those who are unable to do so); and justice (the fair distribution of benefits and burdens among people). On page 4, the principles are applied to the data analysis phase specifically.

Why Am I Always Being Researched?, from Chicago Beyond. This resource offers guidance to organizations, researchers, and funders on how to reckon with unintended bias when it comes to research. The strategies in this guidebook are designed to help shift the power dynamic and the way community organizations, researchers, and funders uncover knowledge together. It is an equity-based approach to research that offers a way for us to restore communities as authors and owners. On page 26, the guidebook discusses authorship, or control of the narrative that flows from qualitative research, as a key equity issue.

Qualitative Analysis: Deductive and Inductive Approaches, from author Andrea Bingham. This short blog post discusses the basics of deductive and inductive coding—the two most common forms of qualitative data analysis. This overview provides helpful information when deciding which analysis method will be best for your team. The post also provides a visual graphic to illustrate the analysis cycles.

Using Software in Qualitative Research, from authors Christina Silver and Ann Lewins. This publication offers guidance on software packages for qualitative research and how to choose the appropriate package, as well as a step-by-step guide to recent versions of the software

ACTION

After completing data collection and analyzing the data, the next step should be to consider how to act on the findings. This step is essential when thinking about how you can share your findings more broadly and how they could inform decision-making and change. Effective communication of the findings not only ensures that insights, narratives, and findings reach their intended audiences, but also encourages an environment of trust, transparency, and mutual understanding. Creating a channel to share the voices of community members validates their experiences and emphasizes their role in how decisions are made. Also, open and consistent communication can spark active participation and collective action toward shared goals.

In addition to the findings, it is essential for communication to include steps that will be taken based on the findings. Community members want to know how their input and feedback are being used to guide and inform decisions and how their perspectives and experiences are being considered. Investing in bidirectional communication about data collection and use affirms community members' participation in engagement opportunities and is essential to building trust. It also communicates a commitment to transparency and accountability.

INSIGHTS FROM THE COMMUNITY

As the Framework was being designed, North Carolina's early childhood community shared important insights to consider when engaging in qualitative data collection and use. These findings informed the following content and may be helpful to keep in mind as you implement your efforts.

WHAT WE HEARD

Early childhood community members want to see action based on the feedback and experience they share.

WHAT CAN BE DONE

Use feedback from early childhood community members to inform concrete actions.

TIPS

Consider the following when taking action:

- **Bring it all together.** Using the data and findings from the analysis stage, create a narrative or story that accurately represents the community's experiences and feedback. Storytelling is a powerful tool, and it can be used to broadly share information, raise awareness on an issue, inform decision-making, and contribute to driving change. Additionally, crafting and telling stories with qualitative findings can garner attention and emotional engagement in ways that reading statements on paper cannot. Developing a compelling story requires time and commitment and could involve multiple revisions. Select a few community members whom you've connected with during outreach and data collection to support crafting the story to make sure the narrative being created both shares the findings and accurately depicts the communities' ideas, insights, and needs.

- **Know the audience.** When planning for sharing and communicating findings, you should know who your intended audience will be and tailor your content for that audience. For example, if you are planning to share back findings with both community members and fellow DCDEE staff, the content and platform of the communication may differ a little. Community members may have different interests from those at a state staff level, so be sure to keep this in mind when considering key communication components, such as what content is highlighted, how words and language are used, and which communication or messaging platform is chosen. Depending on your audience, you can bring this story together in various formats, such as a report or memo, a visual one-pager, a visual presentation, a collection of photos with written narratives, direct quotes from community members, or a video recording of community members sharing their own stories.

- **Ensure that the message is clear and accessible for all.** To ensure that content is accessible to a broad audience, findings should be clear and concise. Language should be plain and simple, and excessive jargon should be avoided. Ensure that the content has the key components of what you are trying to communicate, such as key findings, community highlights, and recommended actions. Additionally, to ensure that information is accessible, communication should reflect the diversity of the community being served, including cultural preferences, range of languages and dialects, and other community-specific needs or characteristics. Another consideration to ensure accessibility involves aligning content with guidance from the Americans with Disabilities Act. Having a clear message is key to making sure you are able to share the findings in a way that will reach your intended audiences, especially people who have been historically marginalized and are often most impacted by this work.

- **Act on the findings.** To the extent possible, findings should be used to drive future efforts, such as informing the early childhood programming being offered or guiding how policies are enacted within communities. In designing the Framework, North Carolina's early childhood community named the great importance of using the feedback, input, and experiences shared to inform concrete actions. It is an opportunity to highlight the specific ways in which the community insights have influenced decision-making and the real-life changes that are the result.

- **Encourage ongoing feedback loops.** Seek opportunities to continue to center community members as the experts even after data collection is completed. Establish feedback loops to check in with community members and ensure that there is authentic space to receive their input. Fostering ongoing engagement can ensure that decisions or actions that result from your work continue to reflect the realities of young children, families, and the larger community—both in the near term and the future.

EQUITY CHECK

Restoring communities as experts and advancing progress toward equity are core to the Framework's approach. These core values are just as important when you are collecting data as they are when you are deciding how to act on the findings. When sharing the story of what was found, it is critical to determine how to best communicate the results in a way that is accurate, respectful, and responsive to the diverse communities being served. Ask yourself: ***Can I hear and see our participants and local community members in what is being disseminated, especially the voices that are often not heard?*** When using the findings to influence decision-making or future action, consider how results can be a catalyst to undo existing inequitable practices and policies, particularly for those who have been historically marginalized. Ask yourself: ***What can be done to address the feedback in ways that amplify strengths, address expressed needs, and advance equitable solutions?***

STORIES

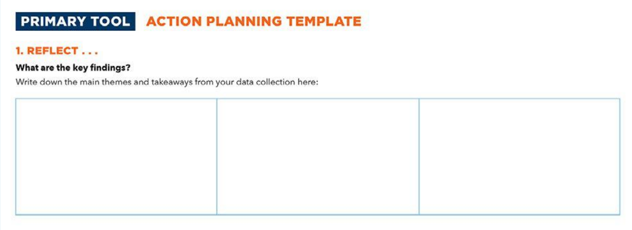
Please watch the video to learn more about qualitative data in action. Successes, lessons learned, and other tips are shared directly from those doing the work in the field.

TOOLS

The tools in this section were designed to support action planning for your effort.

PRIMARY TOOL

Action Planning Template LINK


PRIMARY TOOL ACTION PLANNING TEMPLATE

1. REFLECT . . .

What are the key findings?

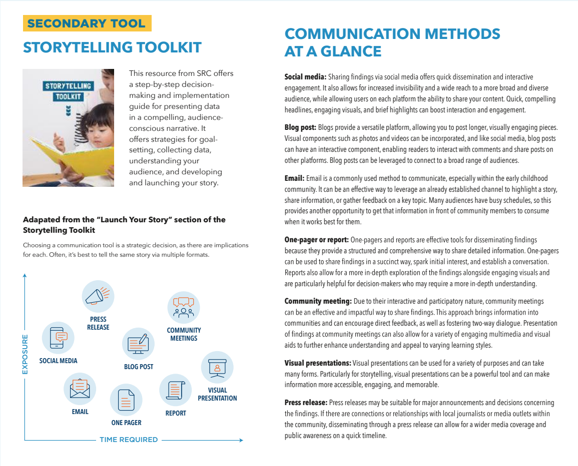
Write down the main themes and takeaways from your data collection here:

Please watch THIS VIDEO for a brief walkthrough of the tools.

OTHER HELPFUL TOOLS

SECONDARY TOOL

Storytelling Toolkit LINK


SECONDARY TOOL

STORYTELLING TOOLKIT

This resource from SRC offers a step-by-step decision-making and implementation guide for presenting data in a compelling, audience-conscious narrative. It offers strategies for goal-setting, collecting data, understanding your audience, and developing and launching your story.

Adapated from the "Launch Your Story" section of the Storytelling Toolkit

Choosing a communication tool is a strategic decision, as there are implications for each. Often, it's best to tell the same story via multiple formats.

COMMUNICATION METHODS AT A GLANCE

Social media: Sharing findings via social media offers quick dissemination and interactive engagement. It also allows for increased invisibility and a wide reach to a more broad and diverse audience, while allowing users on each platform the ability to share your content. Quick, compelling headlines, engaging visuals, and brief highlights can boost interaction and engagement.

Blog post: Blogs provide a versatile platform, allowing you to post longer, visually engaging pieces. Visual components such as photos and videos can be incorporated, and like social media, blog posts can have an interactive component, enabling readers to interact with comments and share posts on other platforms. Blog posts can be leveraged to connect to a broad range of audiences.

Email: Email is a commonly used method to communicate, especially within the early childhood community. It can be an effective way to leverage an already established channel to highlight a story, share information, or gather feedback on a key topic. Many audiences have busy schedules, so this provides another opportunity to get that information in front of community members to consume when it works best for them.

One-pager or report: One-pagers and reports are effective tools for disseminating findings because they provide a structured and comprehensive way to share detailed information. One-pagers can be used to share findings in a succinct way, spark initial interest, and establish a conversation. Reports also allow for a more in-depth exploration of the findings alongside engaging visuals and are particularly helpful for decision-makers who may require a more in-depth understanding.

Community meeting: Due to their interactive and participatory nature, community meetings can be an effective and impactful way to share findings. This approach brings information into communities and can encourage direct feedback, as well as fostering two-way dialogue. Presentation of findings at community meetings can also allow for a variety of engaging multimedia and visual aids to further enhance understanding and appeal to varying learning styles.

Visual presentations: Visual presentations can be used for a variety of purposes and can take many forms. Particularly for storytelling, visual presentations can be a powerful tool and can make information more accessible, engaging, and memorable.

Press release: Press releases may be suitable for major announcements and decisions concerning the findings. If there are connections or relationships with local journalists or media outlets within the community, disseminating through a press release can allow for a wider media coverage and public awareness on a quick timeline.

RESOURCES

Check out these resources to learn even more about this step of the process:

Advancing Better Outcomes for All Children: Reporting Data Using a Racial Equity Lens, from the Annie E. Casey Foundation. This guide outlines how to produce equity-informed written material that reflects community-level data, and it includes tips on the overall organization and presentation of data as well as on the narratives that accompany indicators.

Ethical Storytelling 101, from Kindful. This webinar addresses common questions and concerns surrounding the sharing of nonprofit stories, including how to avoid exploitation and how to promote equity and inclusion through story. Award-winning storyteller Madison Gonzalez describes what makes a good story and how to share stories in a way that uplifts the community.

How Can We Tell Stories of Systems Change That Are More Reflective of the Way Change Happens?, Collective Impact Forum. In this webinar, Cynthia Rayner and Tad Khosa of Collective Change Lab build on their work in the Systems Storytelling Initiative, where they have convened a diverse and global community of practice of storytellers to uncover and discover techniques for systems storytelling. They answer questions and share specific practices for telling stories about changing systems that feel grounded and real.

Racial Equity Impact Assessment, from Race Forward. This reflection guide can benefit all initiatives that engage and impact communities. It is built on the recognition that if we do not consciously address racial inequities in our efforts, we often unconsciously replicate them. This tool offers a series of reflection questions that teams of researchers or others learning from and acting on behalf of communities can use to keep equity at the center of their efforts and outcomes.

Qualitative Research Dissemination, from the book *Graduate Research Methods in Social Work* by Matthew DeCarlo, Cory Cummings, and Kate Agnelli. This chapter provides a comprehensive overview of different considerations when sharing qualitative research findings. The chapter asks readers to reflect on audience, ethical considerations, and your own voice as a researcher. It also provides examples of different ways to share findings based on audience.

MOVING FORWARD

Overall, the Framework for Qualitative Data Collection and Use is a first, important step toward creating a brighter future for North Carolina's young children. This new approach aligns with the core values and mission of DCDEE, paving the way for an entirely fresh approach to engaging families, early childhood providers, community leaders, and all others invested in the well-being of young children. The Framework elevates qualitative data as a living, breathing, dynamic way of making meaning and gaining a deeper understanding of the communities being served. Taken together, enhanced approaches to elevating community voice and the use of qualitative data make it possible to better amplify strengths and address the diverse needs of the early childhood community, particularly those who are often furthest from opportunity. These approaches foster the vital connections that will ensure that all young children across the state have what they need to grow, learn, and thrive.

APPENDIX

GLOSSARY

Advisory council workgroups: Two workgroups established to support SRC's research efforts by ensuring that the decision-making is shared and the research effort is designed and planned in a manner that is meaningful and relevant to a range of key stakeholders. One workgroup consisted of internal and community-facing DCDEE staff, and the other workgroup included community stakeholders who represent and reflect the lived experiences of diverse communities.

Community-facing DCDEE staff: Staff who are employed by DCDEE and work in communities (i.e., monitoring or otherwise supporting programming).

DCDEE (the Division): Any individual or organization who represents the Division of Child Development and Early Education (i.e., community-facing staff, DCDEE staff or leadership).

Directors/administrators: Staff who are in leadership positions in early childhood programs, such as private early care and learning programs, Early/Head Start, or state-funded preschool programs, including directors, assistant directors, principals, curriculum supervisors, education managers, family service coordinators, and so on.

Early childhood community member: Any person living in North Carolina who is interested in, concerned about, or impacted by the improvement of early childhood systems.

Equity approach: A way of seeing, thinking, and acting aimed to develop policies, practices, and programs that provide opportunities, promote fairness and access, and remediate inequities.

Family Child Care Home Providers: Professionals who operate private early care and learning programs in their homes.

Internal DCDEE staff: Staff who are employed by DCDEE and work in the central office.

Policies: The sets of ideas or plans that DCDEE, other federal/state/local agencies, and federal/state/local leaders have designed and put into place to govern the programs that support children and families.

Program implementation: Putting into practice approved policies.

Qualitative research: A rigorous approach to asking and answering questions that focuses on the "how" and "why" and enables a deeper understanding of experiences and contexts.

Quantitative research: A rigorous approach to asking and answering questions, based on collecting data by observation or measurement.

State staff: Staff who work at different levels within DCDEE and the North Carolina Department of Health and Human Services.

Storytelling: A human-centered way of sharing complex information, highlighting key insights and contexts, and providing a picture of those represented by the data and who may be impacted by decisions based on the data.

Teachers: Staff who teach in early childhood programs, including private early care and learning programs, Early/Head Start, and state-funded preschool programs.

FULL SET OF TOOLS

Following are the full set of tools for the Framework for Qualitative Data Collection and Use. Click on the titles to jump to the tool you want to check out!

KEY ELEMENT	PRIMARY TOOL	SECONDARY TOOL
PLANNING	Planning Template	Data Collection Methods at a Glance
OUTREACH	Outreach Plan Worksheet	Choosing an Outreach Method
COLLECTION	Data Collection Checklist	More Tips by Collection Method
ANALYSIS	Data Analysis Worksheet	Data Analysis Journey Map Unpacking Your Findings Worksheet
ACTION	Action Planning Template	Storytelling Toolkit

PLANNING TOOLS

WHY DO THIS?

Planning before data collection is key to successful implementation, as it allows you to define your focus, goals, and methods. Having clearly articulated objectives to come back to is important as data collection and analysis get underway. Additionally, planning ensures that you take time to consider how to make data collection equitable and accessible to the community.

REMINDER TO KEEP THE PRINCIPLES IN MIND

As you walk through each step of the process, it is important to consider how you will center the key principles and hold yourself (and one another) accountable for being **community-guided, equity-driven, ethical, transparent, and responsive.**

HOW DO I USE IT?

STEP 1: **Gather your team.** It can be important to gather all the key members of your team or other important voices vital to the success of the project. Coming together at the beginning to share advice, input, and ideas will be essential to help inform planning and make the most of all your next steps.

STEP 2: **Follow the template.** Reflect and answer the following questions.

STEP 3: **Create your plan.** Using your reflections from guiding questions, create a plan for data collection and use.

PRIMARY TOOL PLANNING TEMPLATE

Use the following template to develop your plan.

ALIGNMENT

Is there data that already exists, or are similar efforts being made that align?

It is important to make sure you are not duplicating efforts and to ensure that your work adds to what already exists. If similar data is already available, you might want to consider how your work will build on this existing knowledge. Or it might be useful to identify whether other efforts are currently being made with which you could align or collaborate. This can help you be more efficient by coordinating and streamlining work to maximize resources. This also will help avoid placing unnecessary burden on communities–you don't want to ask questions they have already answered!

TIMELINE

Do we have a realistic timeline for the completion of this project?

It is important to create a careful balance of time, resources, and scope to ensure that your project is completed on time. Consider all activities involved in your data collection, as well as your own time and resources and the participants' time.

PURPOSE

What is the purpose for this data collection?

This might look like a list of research questions or objectives that you want to answer with your effort. This is a particularly good time to make sure that the intent of the work is grounded in the guiding principles: Is the purpose community-guided? Equity-driven? Ethical? Responsive? Transparent? The purpose of your data collection effort should be clear and inform all other steps in your work.

PARTICIPANTS

Whose voices and input should be represented in this work?

Reflect on which community members have the most insight into the issue or would benefit the most from your project. For a more holistic understanding, consider whose voices are often represented and who has not been heard from.

RESOURCES

Do our available resources match the proposed goals and scope of our project?

Sometimes there's a tendency to bite off more than we can chew. Make sure you consider your own limits and resources, such as time, funding, location, and availability of sites/participants as you plan your project.

WAYS TO COLLECT DATA

What is the best data collection method for this project?

There are various methods to collect qualitative data, such as one-on-one discussions in interviews, group discussions or focus groups, open-ended questions in surveys, and more. Spend some time reviewing the different types of qualitative data collection methods, and consider the best fit based on your purpose, participants, and available resources. An important part of choosing your data collection methods is also understanding what materials and resources are needed to execute, such as recording devices, laptops, printed protocol guides, and consent forms and incentives. Also consider what materials might be needed for your work to be most successful.

ETHICAL CONSIDERATIONS

How will we ensure that all participants feel valued, heard, and respected during data collection activities?

When engaging with community members, it is important to ensure that they feel respected throughout the entire data collection process and trust us with their valuable insights. Part of providing this assurance is maintaining privacy, confidentiality, and transparency throughout data collection.

Source: O'Donoghue, T. (2006). Planning your qualitative research project: An introduction to interpretivist research in education. Routledge.

Check out this additional tool – Qualitative Data Collection Methods at a Glance – to help you decide which method is best for your work.

TIMELINE

ALIGNMENT

PARTICIPANTS

PURPOSE

RESOURCES

ETHICAL CONSIDERATIONS

WAYS TO COLLECT DATA

SECONDARY TOOL

QUALITATIVE DATA COLLECTION METHODS AT A GLANCE

	I WANT TO...	INTERVIEWS	FOCUS GROUPS	OPEN-ENDED SURVEYS	PHOTOVOICE	FIELD OBSERVATIONS
Data Collection Purpose	Understand individuals' experiences and perspectives	X	X	X	X	X
	Use a creative and engaging way to collect community member experiences				X	
	Use a collaborative approach that can foster community among participants				X	
	Understand the day-to-day experiences of select community members and/or the environment in which they live, work, and so on					X
	Gather multiple community member experiences and perspectives at once		X	X	X	X
	Explore potentially sensitive, controversial, or vulnerable topics within the early childhood community	X			X	
	Create space for community members to tell their own stories				X	
Data Type	Collect data through dialogue or conversation	X	X			
	Collect data that can be highlighted through media (photos, video, audio, etc.)				X	
	Collect written data (including artifacts)			X	X	X
	Collect individualized data	X		X	X	
Time and Resources	Collect data within a tight timeline		X	X		X
	Collect data with ample time and resources	X	X	X	X	X
	Allow participants to respond independently and on their own time			X	X	
	Collect data with a small research team (1–2 persons) with limited time to complete data collection		X	X		

Source: Merriam, S. B., & Tisdell, E. J. (2016). Qualitative research: A guide to design and implementation (4th ed.). Wiley and Sons.

OUTREACH TOOLS

WHY DO THIS?

Outreach is about not just connecting with potential participants but also getting to know the community and its members on a deeper lever. With this information, you can meaningfully create an effective plan for outreach that centers the community and builds trust.

HOW DO I USE IT?

STEP 1: Ground in the research questions. Write down your research or guiding questions for your data collection. Use the questions to frame your thinking about what you are trying to learn and who will help you to learn this. Be open to referring back to the research questions as you reflect and walk through this worksheet below.

REMINDER TO KEEP THE PRINCIPLES IN MIND

As you walk through each step of the process, it is important to consider how you will center the key principles and hold yourself (and one another) accountable for being **community-guided, equity-driven, ethical, transparent, and responsive.**

STEP 2: Reflect and write. Reflect on each of the questions in the worksheet, but try to answer the questions in the order presented. Intend to have each subsequent set of questions build on the responses from the previous questions.

STEP 3: Create your strategy. Use the responses to the questions in the worksheet to begin to develop an outreach strategy for your data collection.

PRIMARY TOOL OUTREACH PLAN WORKSHEET

WHY
Write your research or guiding questions.

WHO	WHAT	WHERE	HOW	WHEN
Which people do we need to hear from the most? Which other people do we need to hear from? Who from the community might be able to support us in our effort?	What do we know or what have we learned about the community members we want and need to hear from? Have we previously had successes, challenges, or both in reaching out to community members? What are our limitations?	Where do our community members most frequently spend time? Where do community members feel most comfortable? How can we navigate these spaces respectfully?	Given what we know, which communication methods do we think will be most effective in reaching community members? What communication materials will we need for outreach to be successful?	What is our timeline for outreach for us to keep the project on track? How might that timeline align with or impact what is already happening in the community?

Check out this additional tool – Choosing an Outreach Method – to help you prepare for outreach.

SECONDARY TOOL

CHOOSING AN OUTREACH METHOD

METHOD	ADVANTAGES	LIMITATIONS	EXAMPLES
Email and newsletters	• Can be an effective and easy way to reach a large number of community members in a short amount of time. • Personal email addresses do not change often, and email can reach your contacts wherever they are.	• Not all community members have consistent access to the internet or their email. • Some people do not consistently check their email. • If you are not a known or trusted contact, your emails may be ignored or flagged as spam or a scam!	Email Communication Examples
Mail	• Provides another option to reach community members. • Some community members may respond more favorably to outreach that is in hand.	• Maintaining up-to-date mailing addresses can be a challenge. • Traditional snail mail may be overlooked as junk mail.	Mailer Example
Social media	• There are a variety of social media platforms to use for outreach, such as Facebook, X (formerly Twitter), Instagram, and TikTok. • Can easily partner with local community organizations or leaders who have social media presence to post your outreach. • Once content is developed, the outreach can quickly reach a wide range of people.	• Social media is open to everyone, including scammers! They can fraudulently sign up to participate in your data collection activities and ultimately jeopardize your data.	Social Media Examples

METHOD	ADVANTAGES	LIMITATIONS	EXAMPLES
Phone calls	• Add a personalized touch to outreach. • Phone calls can help you reach your contacts directly and get the information to them and possibly an agreement to participate.	• Can be very time-consuming and use a lot of your resources (staff time, budget, etc.). • Many people do not answer calls from unfamiliar phone numbers.	Phone Script Example
Word of mouth / face-to-face	• Adds a personalized touch to outreach. • Can allow you or your staff to build relationships within the community. • Community members may be more likely to engage if they learn about data collection from other members of the community.	• Can require a lot of time depending on your specific strategy. • May take a longer period of time for information to spread via word of mouth.	(Word of Mouth) Email Communication Example
Flyers	• Allow for quick exchange of information, such as at a community event or gathering. • Can be shared in person or left for self-paced engagement by community members.	• Printed flyers and other materials are often disregarded or overlooked.	Family and Provider Focus Group Flyer Family Focus Group Flyer (Spanish) PhotoVoice Recruitment Flyer FAQ Flyer Sample
QR Codes	• Can be included as a part of other methods, such as being printed on a flyer, sent in the mail, or distributed in a newsletter. • Provides convenient access to online information and can be linked to anything such as websites, consent forms, surveys, and study infographics.	• Not everyone in the community may be familiar with QR codes or tech savvy enough to use them. • Similar to social media, QR codes can be scanned by scammers if widely distributed. Protocols to verify a person's identity and/or relation to your intended participants must be in place.	QR Code Example

COLLECTION TOOLS

WHY DO THIS?

Collecting data from community members must be done thoughtfully and with intention to capture relevant, impactful, and honest stories that will inform your findings. To collect a range of data, it is important to have a plan when collecting data and to make data collection tools accessible to all participants.

HOW DO I USE IT?

STEP 1: Recall the planning worksheet. Take a moment to reflect on your original data collection plan, the methods you chose, and the resources gathered to complete the data collection.

STEP 2: Complete the checklist. Further develop and refine your data collection plan by reflecting on and answering the following questions.

STEP 3: Enact your plan. Put your plan in motion and move forward to collect data.

REMINDER TO KEEP THE PRINCIPLES IN MIND

As you walk through each step of the process, it is important to consider how you will center the key principles and hold yourself (and one another) accountable for being **community-guided, equity-driven, ethical, transparent, and responsive.**

PRIMARY TOOL DATA COLLECTION CHECKLIST

METHODS

Ensure that your chosen methods are still the best methods to answer the research questions.

Whether you chose interviews, focus groups, PhotoVoice, or a combination of options, take time to reflect on whether your methods are still best suited for your purpose and make adjustments based on any new information, developments, or resource changes since the planning stage.

- ☐ I have confirmed my current guiding/research questions and data collection goals still align with the chosen data collection methods.
- ☐ If applicable, I have adjusted the methods to account for any new information, developments, or resource changes since the planning stage.
- ☐ As needed, I have taken the time to become knowledgeable in our chosen methods, exploring the resources available in the Framework and seeking assistance as necessary.

PROTOCOLS

Develop cohesive facilitation and/or protocol guides to support your data collection.

Protocol guides will ensure the integrity of your data collection by standardizing the questions asked to participants and providing a process for obtaining consent, ensuring confidentiality, and gathering feedback from participants.

- [ ] I have created facilitation and/or protocol guides.
- [ ] The facilitation and/or protocol guides include suggested language and study context to be shared with participants as well as a notice of confidentiality and consent.

ACCESSIBILITY

Ensure that data collection activities are accessible to all interested members of the community, particularly those whose experiences and stories are underrepresented.

To encourage participation from a diverse group of people, maximize accessibility by providing for multiple forms of engagement (in person and virtual), translated materials, and interpreters, and strive to host data collection events in the community.

- [ ] I have provided multiple methods of engagement (e.g., in-person and virtual).
- [ ] If applicable, I have chosen in-person locations that are accessible and familiar to my participants.
- [ ] I have translated data collection materials (e.g., survey questions, interview and focus group questions, PhotoVoice workbook) and hired interpreters (as needed) based on the primary languages of my participants.

CONSENT

Make sure all community members consent to data collection activities.

Provide participants with the context and purpose of the study, details on how their information will be used, and space to ask questions. This is key to securing fully informed consent from participants prior to any data collection.

- [ ] Prior to data collection, I have provided all participants with a consent form that details the purpose of data collection and how their information will be used.
- [ ] Before any data collection activity begins, participants are asked to provide verbal or written consent.

DATA COLLECTION

Collect your data in an equitable, accessible, and ethical manner.

It's time to collect your data! Whatever method(s) you chose, collect your data using best practices and following the Framework's principles: community-guided, equity-driven, ethical, responsive, and transparent.

- [ ] I have followed the tips and best practices related to my research method(s).
- [ ] I have included a diverse set of voices through my instructions and facilitation of data collection activities.
- [ ] I have been culturally responsive and adaptive to my participants' needs (e.g., different languages, busy work schedules, transportation).

TRUSTWORTHINESS

Demonstrate that you are trustworthy.

Qualitative data involves gathering stories and, at times, intimate information from community members. To help participants feel at ease sharing their experiences, be open and transparent about yourself, your organization, and the study. In line with the principle of being transparent, take steps to ensure two-way communication between the research team and community members—for example, by creating ways for participants to communicate and share input with the research team or by providing regular updates on data collection activities and timelines.

- [ ] I have provided clear and concise information to all participants, as well as contact information participants can use.
- [ ] I have created a way for participants to communicate and share input with the research team.
- [ ] I have a plan to communicate regularly with the community—for example, by providing updates on data collection activities and timelines.

MIDPOINT CHECK-IN

Plan for interim or midpoint check-in(s).

It is good practice to check in with yourself and your team halfway through a study to reflect on what is working well and what may need to shift. This check-in can include revisiting your stated goals and purpose, the effectiveness of outreach strategies, and/or the quality of data collected so far.

- [ ] I have planned an interim or midpoint check-in with myself and/or the team.

PRIVACY AND CONFIDENTIALITY

Establish a consistent protocol to keep data private and secure.

Whether you are using an encrypted database, password-protected computers, or locked filing cabinets, it is important to have a consistent practice established. Having a consistent protocol is also important when removing names and other confidential information to keep data organized.

- [ ] I have shared privacy and confidentiality protocols with my participants.
- [ ] I have anonymized the data collected.
- [ ] I have stored electronic data securely (e.g., encryption, password protection).
- [ ] I have stored physical data securely (e.g., secure storage or filing system, locked drawer).

NOTES

Check out this additional tool – More Tips By Collection Method – to help you prepare for the next steps.

Sources: Jacob, S. A., & Furgerson, S. P. (2012). Writing interview protocols and conducting interviews: Tips for students new to the field of qualitative research. *The Qualitative Report, 17*(42), 1-10. Retrieved from http://www.nova.edu/ssss/QR/QR17/jacob.pdf

Tankala, S. (2022, September). Maintaining the privacy and security of research participants' data. Nielsen Norman Group. https://www.nngroup.com/articles/privacy-and-security/

Watharow, A., & Wayland, S. (2022). Making qualitative research inclusive: Methodological insights in disability research. International Journal of *Qualitative Methods, 21*.

https://doi.org/10.1177/16094069221095316

Rev. (n.d.). How long does it take to transcribe one hour of audio or video? Retrieved December 11, 2023, from https://www.rev.com/blog/resources/how-long-does-it-take-to-transcribe-audio-video

SECONDARY TOOL

MORE TIPS BY COLLECTION METHOD

DATA COLLECTION METHODS	ADVANTAGES	LIMITATIONS	BEST PRACTICES
INTERVIEWS Typically, these are one-on-one conversations that create more intimate environments for community members to share information.	• Interviewees may feel more comfortable sharing sensitive or vulnerable topics during a one-on-one interview. • Interviews allow interviewees to talk about their experiences at length, which may provide a more in-depth picture and understanding. • Interviews are useful to gather individuals' direct quotes–to provide illustrative examples and nuanced stories.	• It takes time to coordinate the logistics, prepare the interview protocol, and ensure that the language included in the protocol is inclusive, human-centered, and strength-based. • If the interviewers are not relatable or trustworthy, the interviewees may be reluctant to share their honest opinions. • Interviewers hold a lot of power and control over the line of questioning, and their presence may bias responses.	• Interviews should last between 30 minutes and an hour, and they should be scheduled at a time that works best for the participant. • Recruit participants you believe can provide the experiences that you want to elevate. • When possible, conduct the interview in the community member's preferred or home language. • Be an active listener, and be flexible. At times, the conversation may lead you to asking questions in a different order from your protocol, so you should be comfortable with pivoting and moving around in the protocol. However, be sure to get answers to all of your questions. • It often can be helpful to record interviews to accurately capture all that is shared and to ensure that nothing is missed. • **Refer to the sample focus group and interview facilitation guide for more facilitation tips and templates.**

DATA COLLECTION METHODS	ADVANTAGES	LIMITATIONS	BEST PRACTICES
FOCUS GROUPS Group discussions can help you gather in-depth, honest, and nuanced information.	• Focus groups are useful to understand the opinions of more community members at once. • They provide community members the opportunity to share openly, build on one another's perspectives, and share what they are thinking or feeling.	• Focus groups require extra time, intentionality, and effort to collaborate with community partners and coordinate the logistics so everyone feels welcome and heard. • The session facilitator needs to be familiar with the local community and avoid dominating or leading the conversation. • Not all people are equally outspoken, especially in a large group. Some participants may tend to dominate the conversation, while others may tend to be more reserved.	• The ideal group size is typically 8–10 people to foster rich dialogues among participants and ensure that everyone has a chance to contribute. • Groups are usually led by a facilitator or facilitation team (1–2 persons) who facilitate the discussion by asking relevant questions. • Group discussions should last between 1 and 1.5 hours, and should be planned according to participants' schedules. For example, if you are leading a focus group with teachers, you should schedule sessions after school hours. • Invite community members who can provide a range of experiences and represent the diversity of the community. • Facilitators should notice patterns of participation to ensure that there are a balance of voices during the discussion and that no one person dominates the conversation. • When available, provide translators for community members to ensure that all voices are heard. • As with interviews, it can often be helpful to record group discussions to accurately capture all that is shared. • **Refer to the sample focus group and interview facilitation guide for more facilitation tips and templates.**

DATA COLLECTION METHODS	ADVANTAGES	LIMITATIONS	BEST PRACTICES
SURVEYS Questionnaires can be administered to a group of people in order to gauge their opinions, needs, behaviors, and so on.	• Surveys are a useful method to gather data from a very large number of people in a relatively short period of time. • You can ask open-ended survey questions in a way that can allow you to gather experiences, stories, or feedback from individuals in the early childhood community. • Respondents are provided space to respond openly without being limited to preselected answer choices.	• Surveys, on their own, may not be sufficient to capture the complexity of early childhood systems and community members' experiences. • Surveys may reflect the biases of their creators and include biased language, which may dissuade people from participating in the evaluation.	• Keep the end goal or purpose of data collection in mind when developing questions for the survey. • Use clear and concise language. When developing survey questions, use familiar language, and avoid using jargon. • Avoid asking more than one question at a time. If there are two distinct questions in one, split the questions and ask them separately. • Avoid using leading or biased questions. Make sure questions are straightforward and are framed to focus only on the respondent's opinion and experience. For example, you should not begin a question by inserting opinions of others: "It has been shared by many in your community that more early care resources are needed. What are your thoughts on the current needs of the community?" Instead, you can ask, "What are your experiences with accessing early care resources in your community?" • Always test surveys before launching and sending to community members. Invite individuals who are not a part of your data collection to take the survey and provide feedback on the functionality of the survey and efficacy of the questions. • Keep surveys short, and consider offering incentives for survey completion. • **For additional best practices, refer to these survey administration best practices.**

DATA COLLECTION METHODS	ADVANTAGES	LIMITATIONS	BEST PRACTICES
PHOTOVOICE This addresses a particular issue by giving cameras to people who are directly affected, so that they can document and communicate their experience through their own lens.	• PhotoVoice provides an opportunity for people to visually capture and share their reality. • It helps share the complexities of community strengths and needs in an engaging and impactful way: "a picture is worth a thousand words."	• Not everyone has access to the same digital tools and platforms; therefore, the quality and reach of the images may vary widely. • The materials reflect the viewpoint and biases of the photographer or creator.	• Create a PhotoVoice workbook or guidebook for the selected participants to provide guidance and structure for their photo taking. While you do want to allow for creativity and flexibility, you also want to ensure that their work supports the purpose of the data collection. • PhotoVoice participants should receive compensation or incentives for their time and labor. • Resulting photographs may be exhibited for public display, such as in a report or memo, in an effort to engage the community in dialogue and facilitate positive change. • **Refer to the sample PhotoVoice workbook for additional guidance on PhotoVoice data collection.**
OBSERVATIONS These can be used when you want to explore, gain an in-depth understanding of, and document an environment, behaviors, and interactions.	• Observations can provide a lot of rich, contextual data that is valuable for a more in-depth understanding. • They allow for data to be collected in real time and for observers to be immersed in the environment without being too intrusive.	• The interpretation of observed environment, behaviors, or interactions is subjective and can vary among different observers. • The presence of an observer may disrupt the natural setting, and those being observed may alter their behavior and affect the validity of the data.	• Observations can be very broad, so make sure you have a clearly defined purpose and goal for the observations. • Create a rubric or a set of guiding questions to ensure that you have a focus during your observation time. • Minimize observer bias. Be aware of assumptions, personal feelings, or bias when completing observations, as these can impact what data are collected as well as interpretation of the data. If possible, it is beneficial to assign someone else to conduct an observation if you have personal or working connections to a site or location. • Be a fly on the wall. As best as you can, limit your interactions and involvement with the environment. Find spaces where you can be out of the way so you mitigate your impact or influence on the environment. • **Find additional tips and guidance in this resource on observations.**

Sources: Clayton, J. (2021, January). Best practices in survey administration. University of Wisconsin–Whitewater. https://www.uww.edu/documents/ir/Survey%20Research/Best%20Practices%20in%20Survey%20Administration.pdf

Outwitly. (2019, August). Design research methods: Observations. https://outwitly.com/blog/research-methods-observations/

ANALYSIS TOOLS

REMINDER TO KEEP THE PRINCIPLES IN MIND

As you walk through each step of the process, it is important to consider how you will center the key principles and hold yourself (and one another) accountable for being **community-guided, equity-driven, ethical, transparent, and responsive.**

WHY DO THIS?

In the data analysis stage, you begin to synthesize community member stories to identify larger themes. Combining all your data and connecting themes will unveil answers to your research questions. With these findings, you can determine what efforts are needed to address the issues that your project is aiming to improve.

HOW DO I USE IT?

STEP 1: Recall the planning worksheet. Take a moment to reflect on your original data analysis plan, the methods you chose, and the resources gathered to complete the data collection.

STEP 2: Complete the worksheet. In your team, further develop and refine your data analysis plan by reflecting on and answering the following questions.

STEP 3: Enact your plan. Put your plan in motion, and ensure that you are grounding yourself in the foundational principles: community-guided, equity-driven, ethical, responsive, and transparent.

PRIMARY TOOL DATA ANALYSIS WORKSHEET

DISCUSSION QUESTIONS	NOTES
ORGANIZE **How should we organize data so that it is manageable for analysis?** Before you can properly analyze, clearly label all data and files and organize data in a manageable format (e.g., by date, by question asked, by participant characteristics). Doing so will allow you to find patterns and themes more easily later on.	

DISCUSSION QUESTIONS	NOTES
REVIEW AND CLEAN **What process will be implemented to thoroughly review and clean data?** "Cleaning" data means checking for errors, missing or incomplete information, duplicate data, or mislabeled data. For survey data specifically, this can mean reviewing each row of data and checking for erroneous entries.	
CHECKING BIAS **When analyzing data, how will we ensure that we stay true to the voices of community participants without imposing our own biases?** In qualitative data collection, reflecting on one's own identity and how that may impact the interpretation of findings is an ongoing process throughout the analysis stage. This can include inviting multiple coders to compare interpretations and/or collecting and analyzing multiple sources of data to corroborate results, such as comparing interview data to survey data or PhotoVoice. This ensures you are staying aligned to what community members have shared.	

DISCUSSION QUESTIONS	NOTES
ANALYSIS TOOL **Based on my resources, will a manual or software-analysis method work best for my team?** A variety of software exists for qualitative data analysis, including Google Workspace, Atlas.ti, NVivo, Dedoose, and MAXQDA; however, depending on your resources, a manual analysis works just fine.* If you are using software, take time to orient yourself to the tool's features and uploaded data. If analyzing manually, determine a consistent method to review the data and identify themes. * Please ensure that any platforms used (e.g., Google Sheets, Microsoft Excel, NVivo, etc.) with qualitative data are approved by and follow DCDEE privacy guidelines.	
DATA ANALYSIS **What is my approach to analysis?** Approach qualitative analysis with curiosity and ready to explore the data without jumping to conclusions. Decide whether you will work individually or collaboratively, or both! Take your time to sort and understand the information, looking for common ideas and trends. Develop a plan for keeping track of emerging patterns. **Based on the data, what patterns are surfacing for me and my team?** Using the Qualitative Data Analysis Journey Map, examine your data and engage in collaborative discussions with team members to identify relevant patterns or themes.	

DISCUSSION QUESTIONS	NOTES
THEMES AND FINDINGS **Are my emerging themes grounded in our research questions?** While there may be a lot of interesting information and insights within your data, all findings must relate to your research questions and goals. To begin brainstorming initial themes or codes, you can use the Findings Worksheet. **How do repeating patterns in the data connect to important context, such as historical or current events in the community?** After identifying repeating themes and patterns across the data, consider how they relate to the context in which your study took place. This will be the beginning of a narrative or story that accurately represents the community's experiences and/or feedback.	
FEEDBACK LOOPS **How will we be intentional about providing opportunities for community feedback before finalizing findings?** To ensure that this process is inclusive and intentionally involves external community members, it is recommended that you host feedback loops with research participants and other beneficiaries to confirm that your results resonate with them. Feedback loops can take on many forms based on your intended outcome, including giving updates on the progression of your project to ensure findings resonate or asking for the co-creation of recommendations/action steps. Based on your goal, you can convene participants for feedback in person, virtually, or even asynchronously.	

DISCUSSION QUESTIONS	NOTES
QUANTITATIVE DATA **Where can we use quantitative data to corroborate or provide further context for our study's findings?** Publicly available quantitative data can provide further context for community member experiences. Quantifying participants' stories and experiences (e.g., 65 parents named language as a barrier to access) can also add weight to your findings and help paint a fuller picture.	

Check out this additional tool – Qualitative Data Analysis Journey Map and Unpacking Your Findings Worksheet – to uncover and unpack your themes or findings.

Sources: Learn for Action. (n.d.). Analyzing qualitative data. Accessed May 30, 2024, from https://learningforaction.com/analyzing-qualitative-data

Lester, J. N., Cho, Y., & Lochmiller, C. R. (2020). Learning to do qualitative data analysis: A starting point. *Human Resource Development Review, 19*(1), 94-106. https://doi.org/10.1177/1534484320903890

SECONDARY TOOL

QUALITATIVE DATA ANALYSIS – STEP-BY-STEP GUIDE

Follow these steps to analyze all data collected and draw your conclusions.

DESCRIPTION OF STEPS

Follow these steps to analyze all data collected and draw your conclusions.

ANALYSIS EXAMPLE

You are conducting a qualitative research project with the research question: How do early childhood educators implement new teaching strategies in diverse early childhood education settings? You've conducted interviews and completed a PhotoVoice project with early childhood educators about their experiences implementing new teaching strategies.

1 DIGITIZE & UPLOAD

Begin by making sure all your data has been uploaded to your chosen online platform or prepared for manual analysis. This may include transcribing recordings or uploading and storing photographs.

ANALYSIS EXAMPLE

Start by transcribing, or typing up, the interviews and uploading the images captured. These files will then be uploaded to a secure database or software designed for qualitative analysis.

2 FAMILIARIZE

Get to know your data well by reading or listening to it multiple times. Begin to mentally note potential patterns.

ANALYSIS EXAMPLE

Read through the transcriptions multiple times to get a sense of the content. Look at each picture and begin to note any overlapping patterns across both types of data (interviews and PhotoVoice).

3 CODE

After looking at all the information gathered, create a list of "codes," which are labels that help organize the data. These codes represent the patterns identified. Manually assign codes to all of your data collected, either by hand or by using analysis software.

If working in a team, make sure you define each code to ensure everyone is using the codes consistently.

ANALYSIS EXAMPLE

For this project, based on the patterns identified across your interviews and PhotoVoice images, you might come up with codes, such as the following:

Challenges: instances representing obstacles or difficulties encountered by educators when implementing new teaching strategies.

Successes: instances of successful implementation or positive outcomes resulting from the use of new teaching strategies.

Teacher perspectives: educators' attitudes, beliefs, and opinions about the effectiveness or relevance of different teaching strategies.

Adaptations: modifications or adaptations made by educators to fit new teaching strategies into their specific early childhood education contexts.

Culturally responsive practices: discussions, observations, or depictions related to teaching strategies that promoti diversity, equity, and inclusion within the diverse classrooms.

4 ANALYZE

Take a step back and analyze the data you've coded. Make sense of what you found by organizing the data around themes. You can do this by grouping similar codes into broader categories. As you create your themes make sure they relate to and have implications for your guiding questions and goals.

ANALYSIS EXAMPLE

Using your coded data, begin to organize your codes into larger themes. For example, data coded under "challenges," "teacher perspectives," and/or "adaptations" could be grouped into a larger theme of "**Barriers to Implementation**." Similarly, depending on the data, examples under "successes," "teacher perspectives," and "culturally responsive practices" could be grouped into "Effective Teaching Strategies**.**"

5 ADD CONTEXT

Individually and/or collaboratively examine the meaning behind themes or categories. Consider their significance and implications based on your context and guiding questions.

ANALYSIS EXAMPLE

Delve deeper into the context of each theme. This involves considering the broader educational landscape, school policies, teacher training, and other relevant factors that might influence the emergence of these themes. For example, you might explore how government mandates or funding constraints impact teachers' ability to implement new strategies.

6 DRAW CONCLUSIONS

Draw conclusions based on your full analysis, supported by evidence from the data.

ANALYSIS EXAMPLE

Draw conclusions from your analysis by discussing the implications of the identified themes for early childhood education policy, teacher training programs, or classroom practice. For instance, you might conclude that while certain teaching strategies are effective, they require greater support and resources to be successfully implemented in diverse early childhood settings.

SECONDARY TOOL

UNPACKING YOUR FINDINGS WORKSHEET

To ground your initial data analysis in your research goals and purpose, answer the following questions. Think about what has been learned so far and begin to identify key themes and priorities for your findings. Use the far left column to include the research questions or key topics you are trying to understand. Use the open space to list your and/or your team's responses to the questions.

	WHAT? What are the facts? What did we learn?	**SO WHAT?** What patterns or themes do we see across findings? What hypothesis can we make?	**NOW WHAT?** Where is this pointing us? What should be prioritized?
Research Question 1			
Research Question 2			
Research Question 3			
Research Question 4			

ACTION TOOLS

WHY DO THIS?

Developing a plan to communicate and act on your findings is essential to ensure that the work from your data collection reaches the right audience and leads to the intended impact.

HOW DO I USE IT?

STEP 1: Assemble more thought partners. In addition to members of your team, it may be beneficial to also engage trusted community members whom you've partnered with to support the process of thinking through actions on findings.

STEP 2: Reflect and write. Walk through each set of questions, and write your responses and any additional notes in the spaces provided.

STEP 3: Create your action plan. Using your reflections from the questions, begin to develop an action plan to share your findings with your target audiences and use them to inform decision-making and change.

REMINDER TO KEEP THE PRINCIPLES IN MIND

As you walk through each step of the process, it is important to consider how you will center the key principles and hold yourself (and one another) accountable for being **community-guided, equity-driven, ethical, transparent, and responsive.**

PRIMARY TOOL ACTION PLANNING TEMPLATE

1. REFLECT . . .

What are the key findings?

Write down the main themes and takeaways from your data collection here:

2. CREATE . . .

What is the story?

Based on the key findings, what message or story are we now able to tell?

Use the storytelling canvas to create your story:

IMPACT	HOOK	TRAJECTORY	ELEMENTS
There should always be a desired goal when sharing findings. What do you hope to accomplish by telling this story?	Stories should capture the audience's attention as quickly as possible. A hook provides a reason to care and answers the following questions immediately: Whose story is it? What's happening? What's at stake?	Effective stories often have a beginning, middle, and end. Here you can explain important context related to your work and the early childhood community, share key findings and takeaways, and provide important details for what this means or what might come next. What do you want to highlight in the story?	Adding elements such as specific quotes, photos, infographics, and supporting quantitative data can enhance your message. What elements could be used to emphasize the story?

3. SHARE . . .

Who needs to hear about the findings?

Reflect and list any individuals or organizations for each square:

Who will be most impacted by the findings?	Who has the most influence on the findings?	Who will most likely make decisions based on the findings?	Who can help to spread the word about the findings?

What will be the best way to disseminate the story?

Consider all the different types of communication methods and what might be the most effective for your intended audience:

AUDIENCE	COMMUNICATION METHOD

4. ACT . . .

Based on the findings, what actions do we need to do next?

Reflect and list specific actions needed to inform or impact current practices and policies:

Changes to practice?	Changes to policies?	Other possible changes?

With all potential actions, consider: What are the benefits to the early childhood community? Are there any unintended consequences?

5. RECONNECT . . .

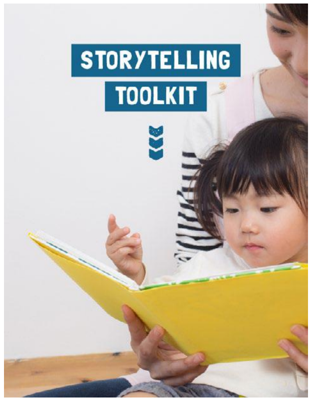
How will we engage the community around the findings in an ongoing way?

Consider how you could continue to listen to and learn from the community to gather more feedback and check in on the impact of your related actions or decision-making.

Check out this additional tool – Storytelling Toolkit – to learn more about these communication methods and extra tips to share the story.

SECONDARY TOOL

STORYTELLING TOOLKIT



This resource from SRC offers a step-by-step decision-making and implementation guide for presenting data in a compelling, audience-conscious narrative. It offers strategies for goal-setting, collecting data, understanding your audience, and developing and launching your story.

Adapted from the "Launch Your Story" section of the Storytelling Toolkit

Choosing a communication tool is a strategic decision, as there are implications for each. Often, it's best to tell the same story via multiple formats.

COMMUNICATION METHODS AT A GLANCE

Social media: Sharing findings via social media offers quick dissemination and interactive engagement. It also allows for increased invisibility and a wide reach to a more broad and diverse audience, while allowing users on each platform the ability to share your content. Quick, compelling headlines, engaging visuals, and brief highlights can boost interaction and engagement.

Blog post: Blogs provide a versatile platform, allowing you to post longer, visually engaging pieces. Visual components such as photos and videos can be incorporated, and like social media, blog posts can have an interactive component, enabling readers to interact with comments and share posts on other platforms. Blog posts can be leveraged to connect to a broad range of audiences.

Email: Email is a commonly used method to communicate, especially within the early childhood community. It can be an effective way to leverage an already established channel to highlight a story, share information, or gather feedback on a key topic. Many audiences have busy schedules, so this provides another opportunity to get that information in front of community members to consume when it works best for them.

One-pager or report: One-pagers and reports are effective tools for disseminating findings because they provide a structured and comprehensive way to share detailed information. One-pagers can be used to share findings in a succinct way, spark initial interest, and establish a conversation. Reports also allow for a more in-depth exploration of the findings alongside engaging visuals and are particularly helpful for decision-makers who may require a more in-depth understanding.

Community meeting: Due to their interactive and participatory nature, community meetings can be an effective and impactful way to share findings. This approach brings information into communities and can encourage direct feedback, as well as fostering two-way dialogue. Presentation of findings at community meetings can also allow for a variety of engaging multimedia and visual aids to further enhance understanding and appeal to varying learning styles.

Visual presentations: Visual presentations can be used for a variety of purposes and can take many forms. Particularly for storytelling, visual presentations can be a powerful tool and can make information more accessible, engaging, and memorable.

Press release: Press releases may be suitable for major announcements and decisions concerning the findings. If there are connections or relationships with local journalists or media outlets within the community, disseminating through a press release can allow for a wider media coverage and public awareness on a quick timeline.