



Planning fieldnotes taking at project level

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Learning outcomes

At the end of this presentation, students should be able to:

- develop a plan for fieldnote taking for their research team which includes how notes will be shared, synthesized and incorporated into study reports and project plans
- pilot the fieldnote taking plan and make improvements to it as necessary

Recap from module 1: why write fieldnotes?

- 1) Act as a source of reference of our observations (i.e. used to inform others of what you observed in the field)
- 2) Capture data that could fill in gaps from other data collection methods
- 3) Give room for documenting farmers' local knowledge and innovations
- 4) Provide learning that could guide the modification of protocols
- 5) Provide evidence on what is necessary to share with farmers (feedbacking information to farmers)

How to use the collected data

The data from fieldnotes can be used as follows:

- **Informally, by an individual:** When reporting data or doing any other work on an experiment (e.g. planning the next season), look through all the notes and make sure you respond to them. (We could make some generic actions like: new experiment, follow up with farmer, do some reading,)
- **Informally, by a group of individuals:** When a group of field staff and researchers get together and everyone shares observations recorded in fieldnotes. Look for common themes, patterns, and discuss their implications. List any generic actions to take.
- **Formally, by a group or individual:** When there are many observations from different field officers or farmers then some structured qualitative data analysis might be relevant, for example, conducting thematic analysis (discussed in module 4).

Planning the fieldnote taking process

What is to systematize?

Open Ended

Mentimeter

to arrange in or according to a system

is to plan - put everything together for a coherent and smooth flow

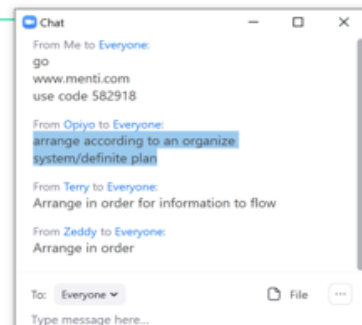
to put into systemstructure or follow some procedure

To organize or arrange something in a sequence that can make it clearly flow or be understood

Is to carefully and plan for the better way of making sure that there is smooth flow of information

Bringing together individual observations and aligning it all in reference to the project theories so as to have a concrete report

organise in a certain unique way/orderly way



Systematizing the fieldnote taking process means to describe a clear structure and plan for how fieldnotes will be collected, analysed, and used in informing research or activities.

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Planning the fieldnote taking process cont'd

A plan for your fieldnote taking process should clearly set out the following:

- a clear objective of the observations to be collected
- identify who will take part in the observations process (i.e data collector)
- indicate the timeframe of observations
- describe how the analysis and synthesis of fieldnotes will be done
- describe how learnings from fieldnotes will be incorporated in reports
- indicate who will be responsible for managing the fieldnotes as sources of data

Case study: a project plan example

An example of a fieldnote taking plan described by a CRFS project

Collection of fieldnotes:

- People participating in the observation activity should know the objective and purpose of observations.
- Notebooks should be carried each time we visit the field. Not just pieces of paper, but durable notebooks. Fieldnote taking is not an event, but takes a long time
- After an individual has made notes, this should be expanded immediately after fieldwork for a particular day.
- At the end of the observation activity, fieldnotes should be submitted to the PI or to data manager for further analysis and synthesis.

Synthesis of fieldnotes (to be done at different levels):

- Field staff should be able to have periodic meetings, maybe monthly, to share in detail the information captured in fieldnotes
- Periodic meetings with other stakeholders including farmers. They can validate some of the captured information

Offline Activity

As an individual or with your project team, describe a plan for your fieldnote taking process for your activity/project, clearly highlighting the following:

- a clear objective of the observations to be collected
- identify who will take part in the observations process (i.e data collector)
- indicate the timeframe of observations
- describe how the analysis and synthesis of fieldnotes will be done
- describe how learnings from fieldnotes will be incorporated in reports
- indicate who will be responsible for managing the fieldnotes as sources of data

PILOT THIS PLAN WITH YOUR TEAM AND ADAPT IT AS NECESSARY

Other resources

- <https://stats4sd.org/resources/451>
- Phillippi, J. & Lauderdale, J. (2018). A Guide to Field Notes for Qualitative Research: Context and Conversation. *Qualitative Health Research*, 28(3), 381–388.
- <https://medium.com/media-ethnography/field-notes-and-participant-observation-in-ethnographic-studies-a-skill-summary-bb74e3881258>