

Field Notes – A List of Resources

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Background

Purpose of this Document

This guide provides a list of resources that are essential in understanding the basics of field note taking by researchers, field staff, students, and other players in a research project. The resources can conjunctively be used to plan training on field note taking.

Why Use Field Notes?

There are many occasions when farmers make comments and observations in relation to on-farm experiments, but these are not captured by researchers. Experiences from many agricultural research projects show the need and importance of such farmer observations and insights being incorporated in the reports; they often support the results of data from formal methods such as surveys and focus group discussions. However, it has occasionally proven a challenge to find ways to systematically capture this sort of information from farmers and organise it in a manner that could inform the ongoing research.

Field notes are a tool that can be used to capture comments and observations. They are relatively easy to take and provide an opportunity to record instantaneous information in the field. If well systematized in the data collection process, the tool can prove useful in a research project.

List of Resources

- i. *Field notes - a rapid guide* (found at <https://stats4sd.org/resources/451>). This provides the basics for taking rapid notes in the field. It gives a firsthand definition of field notes and what a field note is expected to contain, when to take a field note, and essential tips on field note taking.
- ii. *How to write an effective field note* (found at <https://www.youtube.com/watch?v=mp2UQQt4Mdl>). This describes the key characteristics of a good field note, which are: being brief, objective, descriptive, and grounded in theory.
- iii. Phillippi, J. & Lauderdale, J. (2018). *A Guide to Field Notes for Qualitative Research: Context and Conversation*. *Qualitative Health Research*, 28(3), 381–388. (Found at <https://journals.sagepub.com/doi/abs/10.1177/1049732317697102>). This guide summarizes the functions of field notes in qualitative

research, which also apply to mixed methods research. It further explores what one needs to prepare before deciding to write field notes as part of a data collection process. Lastly, it provides a distinctive description of field notes written for the purpose of analysing a study context and those written about individual interviews and focus groups.

- iv. Collins, C. S. & Stockton, C. M. (2018). *The Central Role of Theory in Qualitative Research*. *International Journal of Qualitative Methods*, 17(1), 160940691879747. (Found at <https://journals.sagepub.com/doi/pdf/10.1177/1609406918797475>). This article highlights the importance of understanding the theory driving a research project, which should guide field note taking. Normally, a theoretical framework would embed the theory driving a particular piece of research; it would describe the concepts, assumptions, expectations, beliefs and theories that define a project's research focus (Merriam, 2009, p. 66). This theory highlights the values of the researcher and that of other members in a project, which consequently shape what the team should be looking out for in the field. Understanding the theory of a particular research project makes field notes both objective and informative for the intended research aims. The theory, however, should not limit the observations by ignoring things not ascribed to it, but act as a basis for the collected data.
- v. *FRN Observation protocol* (found at <https://stats4sd.org/resources/445>). Created for the purpose of observing information and power dynamics in the context of Farmer Research Networks ([FRNs](#)), the theme-setting used in this protocol acts as a template for designing 'structured' field notes for specific topics in a project. For example, a project may be interested in understanding gender dynamics in farmers' participation in on-farm trials. Essential themes to this topic will be defined and a 'field note' template will be structured to capture observations on those themes. Though such a template provides more specific details to the topic, it is easy to be narrowed down by the themes and miss out on other interesting and important things from the research activities. In most cases, it is recommended that field notes be open and unbounded, and left to the observer's creativity.
- vi. Strøm, A. & Fagermoen, M. S. (2012). *Systematic Data Integration—A Method for Combined Analyses of Field Notes and Interview Texts*. *International Journal of Qualitative Methods*, 11(5), 534–546. (Found at <https://journals.sagepub.com/doi/pdf/10.1177/160940691201100502>). This article describes a method by which field notes can be analyzed and integrated as a data collection tool in a project.

- vii. *How to manage field notes* (found at <http://www.iphandbook.org/handbook/ch08/p02/> and <https://www.sciencemag.org/careers/2019/09/how-keep-lab-notebook>). These two resources explain how to manage and archive field notes during and after the end of a research project. Management of field notes is important; just like other data collection tools, field notes are subject to examination by other researchers who may want to over-see the data and check for its credibility and validity. Field notes can also be used as secondary sources of data. It is therefore important that people's identifiable information is handled with care, and that an observer writes these notes professionally (Phillippi & Lauderdale, 2018).

Remarks

The resources described above are firsthand resources. When putting together materials for training on field-note taking, the above should form a good starting point. It is likely and expected that one will pick others in their review and training preparations. At the end of this review, one should be able to answer, at least in part, the following questions:

- What is a field note?
- What entails a good field note?
- What is meant by a 'theory of a project'?
- How do you synthesize and integrate field notes during data analysis and write-up?
- How can you manage field notes?

Being able to answer these questions should not replace the need for practical exercises in a training. These will help participants (trainees) absorb the concepts and learn the skills of field note taking.

References

Merriam, S. B. (2009). *Qualitative Research: A Guide to Design and Implementation*. San Francisco: Jossey-Bass.

Phillippi, J. & Lauderdale, J. (2018). A Guide to Field Notes for Qualitative Research: Context and Conversation. *Qualitative Health Research*, 28(3), 381–388.