

A Guide to Field Notes for Qualitative Research: Context and Conversation

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Abstract

Field notes are widely recommended in qualitative research as a means of documenting needed contextual information. With growing use of data sharing, secondary analysis, and metasynthesis, field notes ensure rich context persists beyond the original research team. However, while widely regarded as essential, there is not a guide to field note collection within the literature to guide researchers. Using the qualitative literature and previous research experience, we provide a concise guide to collection, incorporation, and dissemination of field notes. We provide a description of field note content for contextualization of an entire study as well as individual interviews and focus groups. In addition, we provide two “sketch note” guides, one for study context and one for individual interviews or focus groups for use in the field. Our guides are congruent with many qualitative and mixed methodologies and ensure contextual information is collected, stored, and disseminated as an essential component of ethical, rigorous qualitative research.

Keywords

qualitative research; field notes; research methods

Introduction

Historically, “scratch notes” or field notes have been a central component of qualitative research since the early 1900s, originating in the field of ethnographic anthropology (Emerson, Fretz, & Shaw, 2011). Notable anthropologists, including Cushing, Boas, Malinowski, and Mead, developed a style for what are now considered field notes (Ottenberg, 1990). Initially, field notes were researchers’ private, personal thoughts, ideas, and queries regarding their research observations and interviews. Considering only “jottings” of the interviewer, these notes were not believed to be useful in analysis, so remained private (Ottenberg, 1990). In the 1980s, nurse researchers began using their field notes as an additional layer of data, to be interpreted and analyzed, and followed the style and function described in ethnographic methodology. This tradition of including field notes within qualitative health research persisted as it provided information needed in analysis.

It is currently understood that qualitative field notes are an essential component of rigorous qualitative research. The majority of qualitative research methods encourage researchers to take field notes to enhance data and provide rich context for analysis (Creswell, 2013; Lofland, Snow, Anderson, & Lofland, 2005; Mulhall, 2003; Patton, 2002). The collection of field notes is so widely regarded as essential that standardized criteria for qualitative research reporting encourage researchers to

include a statement of collection of field notes in manuscripts (O’Brien, Harris, Beckman, Reed, & Cook, 2014; Tong, Sainsbury, & Craig, 2007).

Field notes serve many functions. Predominately, they aid in constructing thick, rich descriptions of the study context, encounter, interview, focus group, and document’s valuable contextual data. Common functions are described in Table 1.

In addition to functions within the original study, field notes can be useful in subsequent analyses including secondary analyses and metasynthesis. Qualitative research is often time-consuming and produces copious amounts of data useful to other researchers. Existing data are so valuable that the National Institutes of Health now requires researchers who obtain federal funds for a study to make their data available, as ethically permitted, for secondary analyses (National Institutes of Health, 2007). Field notes situate qualitative studies within a larger societal and temporal context. In addition, they provide nontextual or auditory information about interviews and focus groups, useful in understanding participant meaning. When field notes are

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Table 1. Functions of Field Notes in Qualitative Research Within the Original Study.

Prompt researcher(s) to closely observe environment and interactions
Supplement language-focused data
Document sights, smells, sounds of physical environment, and researcher impressions shortly after they occur
Encourage researcher reflection and identification of bias
Facilitate preliminary coding and iterative study design
Increase rigor and trustworthiness
Provide essential context to inform data analysis

Source. Elo and Kyngas (2008); Emerson, Fretz, and Shaw (2011); Mulhall (2003); Rodgers and Cowles (1993); Sandelowski (1994); and Tsai et al. (2016).

disclosed with other study information, they allow for transmission of the full depth of the study context.

Metasynthesis of qualitative studies aims to advance knowledge on qualitative topics and influence practice (Jensen & Allen, 1996). Disclosure of detailed field notes allows for greater assessment of individual studies in the metasynthesis process and increases the ability to achieve a credible synthesis. Although published articles include contextual information, journal space is limited; in-depth field notes released directly from the researcher or as supplementary, online-only material can be useful in assessing transferability of findings from one location to another, both in combining research and implementing evidence into care.

However, it is difficult for students and researchers to find a concise description of information to be included in field notes. The literature provides little concrete guidance on the content of field notes. A few qualitative approaches have specific information on field notes that articulate their methods and analysis steps. Ethnography researchers provide more method-specific guidance, and phenomenology also includes more detailed instruction for new researchers. Researchers using qualitative descriptive techniques or mixed methods do not have a contemporary guide for the collection of field notes. However, Mulhall (2003) does provide guidance for researchers conducting observations.

Although much of qualitative research is learned through close mentoring, new researchers may not have mentors in qualitative aspects of their work, and existing researchers may adopt new techniques not known to colleagues. The purpose of this article is to provide a concise guide to the collection, integration, and dissemination of field notes for qualitative research. We provide introductory guidance on field note creation. Both students and researchers can use these guides as a scaffold, adjusting their approach as needed by their method, theoretical framework, and the information obtained during the study itself.

Method

We performed a literature search in August 2016 to investigate methods of field note collection using keywords *qualitative* and *field note(s)/research/methods* in the Google Scholar, The Cumulative Index to Nursing and Allied Health Literature (CINAHL), and PubMed databases. We reviewed abstracts of at least the first 30 articles in each search and obtained the full text of more than 40 articles. In addition, we reviewed common introductory qualitative research textbooks (Creswell, 2013; Creswell & Plano Clark, 2007; King & Horrocks, 2010; Morse, Swanson, & Kuzel, 2001; Patton, 2002; Polit & Beck, 2012), performed ancestry searches of articles mentioning field notes, and conducted a review of texts in other disciplines including anthropology. However, we were unable to find a comprehensive yet concise guide to field note content appropriate for the new researcher using qualitative or mixed methods.

The articles reviewed stressed the importance of field notes in providing the functions as listed in Table 1. Although the need for field notes was widely included in articles and books about qualitative research, authors did not provide clear instructions on note content. While qualitative methods allow researchers latitude on data collection to answer the research questions, new qualitative researchers may need prompting on how to collect field notes that provide robust context and facilitate later data analysis. We used our review of the literature, both peer-reviewed articles and books, as well as our own research experiences (Lauderdale & Boyle, 1994; Phillippi, Holley, Payne, Schorn, & Karp, 2016; Phillippi, Holley, Schorn, et al., 2016; Phillippi, Myers, & Schorn, 2014; Struthers, Lauderdale, Nichols, Tom-Orme, & Strickland, 2005), to create a guide to the content of qualitative field notes. Institutional review board approval was not required for this work as only publicly available literature was reviewed.

Results

Based on the qualitative literature and our previous experience, we present an introductory set of criteria as a guide. To assist researchers in using these criteria for field note dictation, we have organized them into two one-page guides, one for the context of full study and another for individual interviews of focus groups (see supplementary online-only content). These guides are presented in the style of “sketch notes” (Rohde, 2012) to convey the fluid nature of qualitative field notes and to encourage the researcher to adjust their content based on their methodological approach. The field note guide can serve as a scaffold to support customized details based on researchers’ needs. We anticipate these guides can be printed or

downloaded and used by researchers to guide dictation of field notes to ensure a comprehensive note or memo for the study and each interview or focus group experience.

Preparation for Field Note Collection

Prior to beginning the study, the researcher should plan an approach to field note collection that is congruent with the theoretical framework and the methodological approach. The theoretical framework and methodological approach help to define the nature of knowledge, which directs the line of inquiry and the value placed on different sources of information (Mulhall, 2003). A well-framed approach to field note collection is ideally created prior to study start, then revised purposefully based on findings to incorporate new components while retaining continuity of key items throughout data collection.

Participant consent and institutional review board approval should include plans for the collection, use, dissemination, and archiving of field notes. Field notes will contain a lot of contextual information that may frame the study in a time, place, or population. This information may be able to be disclosed with minimal additional protections. However, other field notes may provide enough information to allow for participant identification. Planning for participant protection should occur prior to data collection, especially when the research is on health-related, sensitive, or illegal topics, and release of information could cause harm. For example, in a study about health-seeking behaviors in migrant workers, information about the current federal and state laws about immigration could be released with other de-identified study data; field notes including details of how and when participants illegally crossed into the United States might require redaction or transformation prior to release. Decisions about what, and in what form, information can be disseminated should be shared with participants as part of the informed consent process.

Field Notes About Study Context

We encourage researchers to include field notes detailing the overall setting to provide rich context of the study itself. Comprehensive field notes, especially those that include critical reflection, can be useful in guiding future data collection efforts in the current study. They create a record of the study unfolding over time and are exceedingly valuable in analysis. When digitized and well organized, they can be searched by keyword and reorganized by topic, time frame, or participant.

With adequate participant protection and attention to methodological and theoretical integrity, data can be used by more than one researcher, increasing the value of the research (Hinds, Vogel, & Clarke-Steffen, 1997). Field

notes contextualize the study and provide perspective on participants' lives that can be useful when looking at the data in the future or examining perceptions across time (Hinds et al., 1997). This information is important for analysis and may be disseminated in the final results when participants are protected and space allows.

While field notes for interviews and focus groups are best recorded immediately, contextualization of the study may be a recursive process throughout the study, with relevant information added based on participant comments. Although we provide an introductory list of topics to address, the researcher should remain open to what additional items may be needed to provide rich context. For example, if participants in a study of coping after cancer diagnosis comment on the difficulty in obtaining pain medications, the researcher would determine the location and hours of local pharmacies that dispense narcotics as well as note the identification and payment needed to obtain the pills. Some aspects of field note collection will require purposeful research, such as comparison of the area to benchmarks, whereas other aspects of field notes will flow seamlessly from community engagement. Once a researcher establishes a pattern to field note collection in several studies, he or she may collect much of the information without prompting.

Basic information. Field notes for the overall study should begin with the study title, principal investigator, and dates of data collection. Although these seem basic, these items link the field note(s) to the study even if separated from study documents. Other basic information includes the season of data collection and pertinent information about the weather. Although these may seem intuitive based on study dates, research is globally distributed and seasons/weather vary with geography.

Pertinent national or cultural holidays can also be included as relevant. For instance, conducting a study on the experience of living with juvenile diabetes during Ramadan may influence the results for Muslim teens. Note any relevant customs for holidays that may affect participant experiences or study results, for example, daytime fasting during Ramadan or sweet consumption at Halloween.

Geographic setting. Next, provide information about the location of the study. Ideally, this will include a map, schematic or to scale with locations of features relevant to the topic of interest noted. Locations may include hospitals, clinics, pharmacies, medical supply companies, grocery stores, parks, religious spaces, or any place relevant to the phenomenon under study. Geographic features that affect health or access to health care should also be noted. For example, if participants must go over a mountain range to access health care, the feature and elevation

should be noted. Some boundaries may not be visually obvious and require the help of an informant, such as gang territories. The location of recruitment efforts and interviews or focus groups should also be noted on the map to situate the study within the larger community.

The absence of features may also be included in field notes. For instance, the lack of movie theaters or recreational venues may be important in research of unintended teen pregnancy. Notation can also be made about access or lack of access to locations as well. For instance, the one grocery store in the community may be distant from public transportation or have features that make it difficult to access via wheelchair.

The local, state, and national laws and policies are also important to assess, as they apply to the topic of interest. While the effect on participants may not be obvious, laws and policies provide insight into the overall environment. For instance, in understanding access to health care for people who identify as lesbian, gay, bisexual, and transgender, state laws regarding discrimination based on sexual and gender orientation may affect their perception of safety in disclosure.

Demographics. Demographics of the overall area provide context about the community. Potential relevant characteristics include the distribution, mean and median age, and educational level in the community as well as race and ethnicity data. This information can be obtained through census data or the local business bureau. Common religions and their beliefs also provide needed context. Even though an individual may not identify as the dominant religion, these beliefs may be a community norm. Common careers and major employers in the area also provide a reference to assess how participants compare to their community and to national norms.

Societal pressures. Events in the larger community can influence participants' perceptions and lives. Locally important events and news include the stability of the local economy and the lives of prominent community members or friends. Tensions and violence surrounding race, ethnicity, and socioeconomic status also exert pressure on participants, especially if those interviewed are from a marginalized group. These tensions may be hard to determine but should be included in the study field notes when discovered.

Although in the past, study of local events could be done with local and regional newspapers, these resources are dwindling, and the researcher may need social media to obtain information. Determination of pertinent social media accounts may need to involve a local informant aware of popular sites for members of the community. Appropriate integration into the digital community has many of the same issues as in-person disclosure of

personal information (Dwyer & Buckle, 2009). Ethical research extends to the researcher's social media presence to community members and participants.

Cost of living. Although qualitative studies are not often focused on monetary assessment, the cost of health care and daily living is often a major influence on participants. Basic information about the cost of living in an area can orient the researcher and is useful if study data are reviewed at a later date. The cost of all items important to the phenomenon of issue should be noted, including medications, home supplies, parking costs at health care facilities, and so on. For instance, in a study of incontinence, the cost of medication, protective undergarments, and a load of laundry at the local laundromat would be relevant. Any recent changes in price or availability are worth including. Price changes can be due to a variety of factors, and understanding of these larger forces can assist researchers in formulating interventions to improve health or access to care.

Costs related to the issue of interest would then be situated against the overall cost of living using measures appropriate to the locale. To assess cost of housing, we suggest median home prices and average rental fees. Transportation costs can be measured through the cost of a gallon of gasoline or bus, taxi, or public transit fare in urban areas. Greater understanding of the costs of car ownership may be warranted in areas without public transportation, if relevant to participants. Transportation costs may need to be compared against averages for the state, national, and previous years if the area is not typical or prices have recently spiked.

To understand food costs, compare purchase prices of food with regional and/or national norms such as the U.S. Department of Agriculture (USDA; 2016) food plans, which are a standard adjusted by geographic location. Some areas tax food and medicines, and these taxes should be included in cost estimates. Whether local shops accept federal supplemental nutrition assistant program vouchers may also be important in exploring access to food. More specific information about food cost and access might be needed depending on the phenomenon of interest. For example, in investigating barriers to weight loss in rural Alaskan villages, a comparison of fresh produce prices across seasons would be useful.

It is also important to take a broad view of health and health care within the community. While the exact components relevant to a study may depend on the theoretical framework, the availability, acceptability, and accessibility of health care can be examined. The physical location of clinics and hospitals is relevant, along with information about how your target population regards the institution and its practitioners. Worth noting is any similarities and differences between the characteristics of the health

care providers and the target population, including language, race, cultural identification, socioeconomic status, or other relevant characteristics such as obesity or clothing. The accessibility to facilities by participants is also important. Accessibility varies by the population characteristics but can include hours of operation, proximity or public transit, parking availability, and accepted payment methods.

The availability and use of alternative or complementary health modalities may also be of interest. The presence and community opinions of alternative healers or practitioners and complementary therapies or medicinal preparations may be relevant and not readily apparent. The opinions of both participants and health care providers surrounding alternative or traditional healing may differ and cause tensions relevant to qualitative health research.

Detailed field notes about the overall study setting assist the researcher in a robust understanding of the participants' lives, contextualizing their response to the phenomenon of interest. Whereas we provide a rough guide to begin field note creation, previous literature on the topic of interest, qualitative and quantitative, as well as participant comments can inform additional data collection.

Field Notes About Interviews and Focus Groups

Field notes about interviews and focus groups can be generated at multiple times (Mulhall, 2003). Many researchers unobtrusively take small, keyword-based notes based during the event, while maintaining participation and eye contact with participants. These short notes can be helpful in remembering important aspects for creation of a detailed field note following the interaction. Ideally, a comprehensive field note is created shortly after the conversation ends, as the researcher's memory is fresh. However, additional critical reflection can be included later. Connections and interrelationships among study data components and iterative refining of interview questions often require additional time and reflection.

Field notes can be collected in a variety of formats, including written, dictated, and even visual sketches. Taking small notes during the interaction can assist your memory but should not interrupt the flow of the moment or distract you or the participant. Following an interview of focus group, we suggest dictating the field notes while referring to our content guide (Supplementary Online Content 2). This allows for a free-flow of ideas, unimpeded by writing and grammar, and will allow the transcript of the field notes to be placed adjacent to the interview transcript for ease of use. Any method of field notations is acceptable if they assist the researcher in

noting information important to analysis while protecting participants.

Begin by noting the study and principal investigator's name as well as the date and time of the interview. Also include the participant's study identification number if linking field notes with any other documents such as demographic information. After these identifying details are completed, field notes can proceed in any order. We have organized the guide from general to specific, but researchers should adjust the flow and content to meet their needs and ensure pertinent items are included. Following transcription, the field notes can be rearranged and organized.

Setting. Include the location of the interview, both geographic location and type of setting. For instance, "The interview took place at 625 Church Street in the Nashville public library conference room." As relevant, describe how the location is related to other points of interest. For example, in a study of homelessness, it would be noted that the public library is a few blocks between a men's shelter and a tourist district and is a common place for homeless men to spend the day.

Describe the room where the interview took place, the location of the participant compared with the interviewer, and any relevant room features or items. If needed, add a sketch of the room where the interview took place. The weather may be important to include, especially if extreme or atypical for the season.

Describe any people present and note whether they consented to have their comments included in the study. Reasons nonrecruited others are present at the interview or focus groups may be important as well. For example, if in a study of family coping following the death of a child, a woman brought her preschooler to the interview because of his extreme anxiety with parental separation.

Participants. Describe the overall appearance and demeanor of participants, noting any baseline nonverbal behaviors. Examples of baseline nonverbal behaviors include hand wringing, dermatillomania, or lack of eye contact. There may be demographic information not collected directly from the participant that can be recorded as well. For instance, physical features, clothing, or accessories may indicate or bestow high or low social status. Also, note the interaction of the participant and the larger environment and others in the room.

Interview. Discuss participant response to the interview as a whole, noting any overarching nonverbal behaviors. Then go through each question individually, noting pertinent behaviors not captured by recording or previous notes. Note any changes to the interview questions and the reasons the questions were adapted for this setting.

This section may be the most robust of the notes to capture important details.

Critical reflection. After noting pertinent details of the interview, spend a few moments intentionally reflecting on the whole of the interview and your performance as a participant in the narrative and as an interviewer. Critical reflections may come easily immediately following the interview or may unfold over time. Although it is important to spend time focusing on reflection soon after the interview (Elo & Kyngas, 2008), information can be added at any point to create a comprehensive documentation useful in later data analysis (Berger, 2015).

Qualitative research acknowledges the role of the researcher as an instrument within the research, shaping the results (Berger, 2015; Thoresen & Ohlen, 2015). Critical reflection after each interview or focus group encourages the researcher to assess their performance, biases, and feelings (Mauthner & Doucet, 2003; Watt, 2007). The process of reflection through field note creation encourages interview technique improvement and refinement of study approach and questions (Elo & Kyngas, 2008; Watt, 2007).

Many qualitative methodologies encourage ongoing analysis of data throughout the study to enhance trustworthiness, permit emergent design, or assess for saturation (Charmaz & Belgrave, 2012; Elo & Kyngas, 2008). Immediately following the interview or focus group can be a good time for tentative analysis, while the emotions and nonverbal behaviors surrounding the discussion are still fresh. While this process is ongoing throughout the study, collection of these first reflections can be valuable in guiding later stages of reflection and analysis.

Integration of Field Notes With Study Data

Field notes can improve the depth of qualitative findings. How they are used is highly dependent on the researcher. As long as participants are protected, researchers can use, archive, and disseminate field notes in a variety of ways.

Following transcription of the interview or focus group and/or the field notes, some researchers use the field notes to “add back” critical nonverbal content into the interview or focus groups transcript (Sandelowski, 1994). For example,

When I found out I was HIV+, I didn't acknowledge it for six months. I didn't tell anyone. [long pause while looking at his feet] Not even my wife. [Voice breaks at the end of the sentence, looks out the window for 2–3 minutes, swallowing frequently, trying to maintain composure] . . . I regret every minute of my silence [clenches fist].

If adding back nonverbal content, use a standard notation system that clearly marks when you have added back content or commentary. Creation of a key is very helpful for later use (Sandelowski, 1994).

Other researchers keep their field notes as a separate document but link with interview or focus group data via a date or participant number. Whether or not the content is added to transcripts, field notes should be stored with study data and protected from disclosure in the same manner as interview/focus group audio and transcripts. If content is later released, notes should be de-identified and participant rights protected as outlined in the consent form (Tsai et al., 2016).

Field notes can be valuable when examining data at a later date or providing data to other researchers for secondary analysis or metasynthesis (Hinds et al., 1997). Field notes are a component of data collection and analysis, requiring the same level of professionalism as face-to-face interactions. However, field notes may contain personal information about the researcher. How participants are described, tentative thoughts on analysis, and critical reflections can be very revealing (Ottenberg, 1990). Just as participants are influenced by their context, researchers are a product of their experiences and larger society (Berger, 2015; Ottenberg, 1990). It is important to assume that your notes may be examined by other researchers, those performing oversight of your work, or even a court of law and to create a high-quality, professional document that demonstrates respect for participants. While field notes can be redacted prior to release, the value of full disclosure likely outweighs potential embarrassment and risks.

Discussion

Our work complements previous literature on qualitative methods and provides guidance in the creation of field notes to contextualize an entire study and generation of notes following an individual interview or focus groups. Building on the work of previous researchers and current qualitative methodologies, we provide both text instruction and guides to assist researchers in documenting larger context for analysis, later data sharing, and metasynthesis. The guides are general enough to be compatible with a variety of qualitative and mixed methods approaches, and allow for customization based on methodology or needs of the research team.

We acknowledge our approach may not be appropriate for all qualitative research, and we encourage researchers to explore the literature detailing their chosen methodology for specific guidance. However, there is a dearth of concrete information to guide students and new researchers in the creation and incorporation of field notes in qualitative and mixed methods research; these guides fill

a need until more methodology-specific guides can be developed. Targeted field note guides could build on this work and include more prescriptive approaches to field note generation and incorporation. Qualitative health research is highly dependent on context. Creation of detailed field notes for interviews and focus groups, as well as for the study as a whole, ensures that the depth of context can persist with the data to allow robust research consistent with qualitative approaches.

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