Post-Exercise Discussion

For some people, this is the book’s hardest exercise. It’s worth the effort. In the best tradition of John Dewey, there’s nothing like learning by doing. I haven’t found a better way to focus attention on the challenges that lie at the heart of fieldwork.

Let’s look at what’s involved in an exercise like this. On the spot, possibly while watching a species you knew nothing about, you had to come up with (1) your own agenda for the session and (2) your own way of trying to achieve that agenda, including (3) a way to capture what you saw. Afterward, you also had to come up with (4) a way to write it all up.

The clarity and appropriateness of these decisions is precisely what determines the quality of one’s fieldwork. Newcomers may have moments of trepidation because of how immediately apparent and unavoidable these decisions are during and after their time in the field. What do I pay attention to? How do I keep track of what I see? How should I summarize this? If you experienced multiple moments of hesitation in deciding how to forge ahead on any of these questions, that is excellent. Awareness of the decisions we have to make is critical to successful fieldwork.

Imagine if you had a plan along all these lines before you started your session. For the rest of this book, you will be preparing yourself to do exactly that—to come up with a good plan for what to do each time you go to the field and for what to do afterward, when you are processing and writing up what you’ve seen. By the time you finish all the
exercises, you should be better able to (1) envision a daily agenda and a creative way of operationalizing it; (2) get the kind of data you desire; and (3) effectively write up (or, better, re-present) and communicate your findings to others.

Of all the questions and decisions in this first exercise, the most important is the decision about what you will pay attention to when you’re in the field. Everything depends upon and flows from the clarity of your daily scholarly agenda—your specific conceptual and analytic interests drive the mission you give yourself as you operationalize and collect data related to them. You can have extraordinary technical skills as a fieldworker but without an agenda driving the use of those skills, it is difficult (if not impossible) to get meaningful data from your time in the field. The lack of agenda is why students commonly feel a bit lost with this exercise, unsure what they should have focused on or if what they got was in any way useful or “right.” You would not be able to make progress toward a larger, compelling whole if you continued this way.

This is the “garbage in, garbage out” lesson for fieldworkers. The quality of what we get out of the field on any given day is a function of what we put into it before our fieldwork starts. Planning the day is everything. Fieldworkers have to be creative and flexible and able to change their plans on the fly. But the more thought we put into each session in the field—the better our plans are to begin with—the more easily we’ll be able to adapt and even change those plans altogether. You’ll still have something tangible to show for it afterward too. This is how one makes progress as a fieldworker, one productive day at a time.

Perhaps the biggest concern that emerges from this first
exercise—especially for novice fieldworkers—has to do with field notes. This concern centers on a variety of related questions. What are field notes? How do they function? How do we take them? What are the different forms in which they might be taken, including photographs, sketching, or filling in data templates? What is the difference between data and other note-worthy elements? How might we keep track of immediate versus longer-term interests? How long we should watch versus record what we see? How many notes should we take? To these, I add one more: what do our field notes reveal about us and our development as fieldworkers?

The rest of this discussion is dedicated to these important questions. Novice fieldworkers tend to worry nicely about their field notes. More experienced researchers may have to work to see and possibly reconsider all the decisions they’ve already made in how they handle their notes. Whichever you are, I encourage you to spend time reflecting on your field notes from this point forward.

Let’s start by considering the definition of “field notes.” The term commonly refers to two different but related sets of notes. The first set of notes is what Emerson, Fretz, and Shaw (1995) call “jottings.” These are the scribbles we make in real time, during our observation sessions. The second set of notes—what Emerson and colleagues call “field notes”—is a more cohesive write-up of one’s jottings. It is written as soon as possible after completing a session in the field, to flesh out the more cryptic jottings as accurately as possible.

I differ from Emerson and colleagues in that I use the term “field notes” to refer to “jottings”—our scribbled, notes-in-the-field, taken in the heat of battle. For me, these are the quintessential “field notes.” Whenever I use
the term “field notes” throughout the rest of this book I am referring to those jottings, our original capturings taken in real time while in the field.

I refer to the more complete expansion of in-the-field notes that fieldworkers typically produce later on as your “write-up” or “written-up field notes.” We will not discuss them at length, as others already do a great job of that, and I will not ask you to produce this second set of notes although you may wish to do so. Instead, for each exercise, I’ll ask you to write a report on what you did while in the field and what you learned from it. This report often incorporates a fleshed-out version of a student’s scribbles-in-the-field, but not always. It will depend on the exercise and your reporting style. Some students present data summaries only, while others include a fully written-up version of their entire session in the field. Do whatever you find useful.

This report encourages you to think of your trips to the field as a series of pedagogical, self-reflective sessions. In writing each report, you will no doubt turn some of your field notes into more complete, narrative summaries. However, you probably won’t expand on everything, creating fully transcribed and carefully detailed versions of your field notes in the ways fieldworkers normally do. For our purposes, it’s not necessary. It’s more important to spend your time thinking about your overall process as a fieldworker.

For many researchers, field notes are composed of almost entirely words. You should not limit yourself in this way. Observation data should include visual note-taking like quick sketches, no-fuss photographs, rough-hewn diagrams, and other methods that let us better capture data and context and help us recall it later. These can be
highly effective methods/tools for communicating one’s findings to others as well.

In fact, field notes serve at least three functions. Their most obvious and straightforward purpose is as mnemonic devices. Your notes are re-presentations of your data, your interpretations of your data, and anything else that happened while you were in the field that you found noteworthy. Your notes help you reconstruct your in-the-field experience.

Field notes can serve a second purpose as well. Since they are the closest capturings we have of our data, some people reference their field notes in formal arguments to validate their conclusions. Just as a physicist might show a graph of the data collected in an x-ray scan to justify her conclusions, an ethnographer might include an excerpt from his field notes—a chart, a quote, a photograph or sketch—to do the same.

In these exercises, your field notes will serve a third purpose. They will function as a critical diagnostic tool, helping you develop a better understanding of yourself as a fieldworker. Over time, your field notes can offer a remarkable window into your transformation as an observer, recorder, sense-maker, and storyteller. We can use them to trace our journeys as fieldworkers.

This connects to another cluster of concerns for researchers new to field notes, centered on the issue of for whom our scribbled-in-the-field notes are written. Field notes exist primarily to serve your purposes and yours alone. It is up to you if you decide to show them to anyone else. The beginning of a process through which we capture and begin to make sense of what we observe, our field notes should consist of the quickest, most accurate ways to capture information so that we can easily recall it when
we finally sit down and engage it more fully.

Given our different skill levels, this means that different information may be best captured through different forms of re-presentation. If the fastest, most accurate way for you to capture something is to sketch it, then do that. Sometimes, a single photograph will jog your memory most effectively.

If you’re lucky enough to be multilingual, then you might find that some observations are most quickly and accurately tagged through one language, others through a different one. Don’t hesitate to use whichever language works best for you in your note-taking. You can put everything in one language during your write-up. Let your field notes be tailor-made for you.

Do whatever works to help you capture information in the field. But remember to give yourself opportunities, like these exercises, to practice taking data in ways that challenge you. Plan sessions in the field when the data do not count so you can practice newer ways of capturing it. Acquire as big and diverse a toolkit as you can for getting the job done.

Many fieldworkers don’t draw, for instance. Some can be resistant to trying. If, however, you’re sitting in the field, doing one of these exercises, and you find yourself thinking, “Darn it! I wish I could draw!” then do so, right then and there. It doesn’t matter if, say, your hasty gorilla sketch looks like the symbol pi or if your painstaking, one-hour-long line drawing looks like a mutant from a Godzilla movie. Either that pi symbol will capture something for you far more effectively than words could, or it won’t. You’ll either learn something unique about that gorilla from the process of drawing your mutant, or you won’t. You have nothing to lose from trying.
No one else has to see your experimental scribbles, sketches, or lousy photos. No one else has to see the heavy underlining, the multiple question or exclamation marks, or all the stars you used to signal your internal dialog. Your excited commentaries, “Did I really just see what I thought I did?!” or “Holy Cow! This is really important!,” are only for you. No one else has to see your honest brackets with nothing but a question mark between them, either—or however you indicate to yourself that you didn’t see what happened just then. If you try something new in your note-taking and it doesn’t work, then you’ve learned that you need to try a different approach—or to practice more. And you’ll have already started to do both.

The most vital elements for you to focus on are the data and any important contextual constraints you had in getting it. Most fieldworkers also want to keep track of anything that strikes them as interesting or important while collecting their data. Add anything else you wish to your notes, as long as you clearly distinguish between what you observed and whatever else you write down. It’s the data you should be interested in, first and foremost.

What, exactly, is your data? Your data consist of the actual things you observe, including the time and place in which they happen. Your data may be captured in many forms, recorded strictly in the field, or fleshed out in stages when you have time to elaborate. The important point is to always remember that your data are what happened, and when and where it did so. Anything else is something else. It is not data.

Because we often strive to capture the fullness of our experience in our field notes, they often include a variety of contextual elements like thoughts about what just happened, questions about the meaning of something we saw,
ideas for the data we’d like to get next—all kinds of musings. These notes can be hugely relevant to our work. They can be the whole point of taking data (as in, sudden realizations because of what we just saw.) But for the purposes of this book’s approach to observation-based research, feelings, impressions, interpretations, and contextual matters do not constitute “data.” In fact, one of your goals should be to get better and better at recognizing the difference between what actually just happened and your interpretations and applications of it. The ability to separate data from reaction is what brilliant careers in science—natural, social, behavioral, and all the professions to which they have given birth—are founded on.

This is why it is so important that you develop a system to keep these things separate from and subordinated to the acquisition of data—both in your notes and in your mind. All of these other matters provide important details and insights to help you interpret the data and tell your story later. While they can be the end goal of your mission, your primary focus should be getting the raw data and keeping it separate from these other elements, so you avoid confusing what actually happened with your interpretations and uses of it.

This view of one’s experience in the field and what appears in one’s notes requires many of my students to do a gestalt trick. Many students tend to prioritize their thoughts about what they see, over careful descriptions of what, exactly, they saw. Initially, their notebooks are filled with detailed reflections on what they observed but not much about what actually took place. There may be lots of close thinking, which is good, but the field is too incidental to the process.

There is an easy fix for this problem. Simply make the
data your primary reason for being in the field. Let all your thoughts *about* the data fall into place behind, alongside, and otherwise separated from it. It helps to develop a visual mechanism in your notes for keeping track of the difference between something observed and your thoughts about it. This is a matter of good scientific practice.

Again, the thought can be a question about what an observed fact means. It can be a reflection about how what you just saw relates to something observed at another time. It can be a postulation about what might have happened while your view was blocked and you could not see the subject. Whatever the thought is, find a way to demarcate that for yourself, so that when you look at your notes it is instantly clear whether a given note is about something that you actually saw or about something you thought. Write your thought as a question. Put it in brackets. Underline it. Whatever technique you choose, you need a personal convention so you can clearly, visibly differentiate what you have seen in the field from your thoughts about it. This, alone, will help you become a more disciplined, scientific observer, able to better separate empirical reality from your interpretations of it.

What should you take notes about? Whether words or line drawings or anything else, the point of field notes is to quickly capture what seems significant to you while it’s happening. These notes are gold no matter how messy and cryptic. They will help you recall moments and details that might elude you otherwise. They serve as placeholders, keeping a spot in your memory warm until you can sit down and make fuller sense of what you saw.

This is why your scholarly agenda and your mission for the day are so important. They help you decide what is significant. If something you see is related in any way to
your mission for the day, then it is data and you should make note of it. You don’t have to understand why it seems significant—you can always figure that out later. Trust your gut. Intuition is a fieldworker’s best friend. The feeling that something may be related to what you’re interested in can be based on previous experience and/or a connection you’re making of which you are not even aware. That feeling should not be dismissed. You’ll develop more confidence in your ability to identify data as you gain experience and expertise. This is one of the signs of being an authority on something—having a good sense of what is and isn’t relevant to a problem at hand—and being able to articulate why.

Don’t forget to note the things that seem normal, commonplace, predictable, and, well, boring. Part of the trick of good fieldwork is learning to be as excited by the everyday and taken for granted as we are by the special, the novel, and the new. It is the element of cognitive salience to our scholarly agendas that determines what goes in our notes, not the element of exoticism. No detail is too small, no interaction, too routine. As long as something seems relevant to your mission for the day, it should be in your notes. Your challenge is to see the mundane as the exciting discovery it can be.

Another hallmark of an outstanding fieldworker is one who is simultaneously immersed in the specifics of a particular field on a given day while also being aware of and looking for more general patterns of behavior. Every session should be seen as a potential touchstone that can inform our larger, possibly career-long questions and interests. Again, the trick is to find a way to clearly, easily keep larger themes and interests separate in your notes from your data and your mission for the day. The judicious
use of highlighters in your notes and the creation of theme-driven, synthetic documents to which you add excerpts over time also might help you identify and weave themes and interests across different projects.

This first exercise may have introduced you to another core concern about field notes: How do you figure out how much to watch and how much to write while you’re in the field? Specifically, this is the issue of the duration of each activity as you switch back and forth between them. We typically may only watch or document what we see. Many students start this course believing that they watch and take notes “at the same time.” This is only possible, however, when we are making the most minimal of notes, perhaps blindly scribbling numbers onto a table in our notebooks while literally not taking our eyes off our subjects. Mostly, students who describe themselves as watching and writing “at the same time” are actually alternating very rapidly between these activities, in an irregular fashion.

For observational fieldwork, you should generally watch as long as you can while still being able to comfortably document what you’ve just seen. Document what you saw as quickly as you can, too, so that you can resume observing as soon as possible. The basic problem is this: if you watch for too long, you’ll forget important details or sequences by the time you start—and eventually finish—writing it down. You’ll also forgo watching new things for a longer period, because you’ll be busy writing down the older stuff. If you watch too little, you may not see important details, a whole sequence, or vital contextual information that would shed important light on your little snippet of action.

This means that the duration of our observation time
and note-taking times will vary across a given session as well as across different sessions in the field. Sometimes there’s an awful lot going on at once. Sometimes it’s a slow day. Sometimes you can’t keep up with what you’d normally manage because you’re under the weather or distracted. Change the amount of time you watch and the amount of time you write as needed.

Experiment to find a good balance between the length of your observation and writing periods. This book includes exercises based on interval research, in part to draw your attention to this important aspect of fieldwork. I strongly suggest that you begin by consciously separating your observation periods from your note-taking periods, observing for short, frequent durations. Shorter observation periods are more memory-friendly. They also let you more quickly note what happened then return your attention to the action. More frequent data points are generally better for capturing the sustained thread of the action, too. This approach is also less likely to result in frustration and generic, glossed-over data that lacks specifics.

This principle applies to note-taking in any media. However, the time it takes to document what is going on varies across all the forms of note-taking we might use, and each has trade-offs. For instance, photography is a super-fast way to record what you see. With current low-to-mid-priced DSLR cameras, one can easily capture hundreds of images in an hour. This might seem a wonderful option for fieldworkers worried about missing things while writing them down. However, for most researchers, such an approach results in an overwhelming amount of superfluous data and, while taking all these photos, it is virtually impossible to mentally process any of what is going on. You would have to push off all the analysis—the
most important part of our work—to a later time, when you could go through and think about each photo. Unless all the shots captured essential information that you wanted to carefully code for a time series study, it would be much better to take photos selectively and sparingly, using the time in the field to encounter, explore, and think about what you’re seeing.

A number of fieldworkers rely on lengthy, sometimes automatic video recordings of what happens in their research site in lieu of selective documentation in real time. This results in the same problem. Actually watching and analyzing what’s going on gets pushed off to another time, if it happens at all. When researchers do look at it later, they stare at a screen to do so instead of observing in real time at the actual location.

I find that looking through the viewfinder of any type of camera severely limits my natural field of view and alters my experience in the field. When photographs are essential, I prefer to work as part of a team. Design ethnographer and gifted photographer John Dominski and I work this way. For analytical photography, two sets of eyes are much better than one, especially if one set has a full, unencumbered field of view and the other stays focused on capturing the world through the lens.

Unlike photography, one needs a substantial amount of time to visually capture what one observes with a careful line drawing. The subject may very well move before the drawing is complete. Just as with photographic and video imagery, one must balance the trade-offs, and be strategic in when and how one uses the advantages of a sustained drawing for capturing data and insights. If the subject is sleeping, or sitting at a desk for a prolonged period, for instance, one might be able to minimize the amount of
data and insights one must forgo while producing the drawing. One could also rely on fast sketches whenever possible rather than painstaking, detailed drawings.

There is one more aspect to the question of “how much should I write?” People have very different ways of taking handwritten notes, from the amount of notes we take to the forms in which they appear. Some researchers are parsimonious, with notes that look more like spare lists of keywords—possibly in multiple languages—and partially drawn cartoons. Some produce ways of quickly recording and summarizing what they see via tables, charts, and other templates that let them write very few words. And then there are researchers who produce the equivalent of a Victorian journal with fully formed and grammatically correct sentences that go on for pages.

Wherever you fall on a long list of diverse options, remember: you should have enough recorded in your notes so that when you write up your report for the day’s exercise, you can do it without being frustrated. Take enough notes so you can remember exactly what happened. The task at hand, the nature of the field, how well you pay attention, and how well your memory works will all influence how much you need to do this.

This brings me back to the diagnostic function of your field notes. As you proceed with these exercises, try to look at your field notes in a curious, dispassionate way. They can help you discover how you think, how you work, your fallback assumptions and techniques, and the edges of your comfort zone. They can show where you are in your journey as a fieldworker—even a particular kind of fieldworker, trained in a certain discipline or profession—and how you have changed over time. Your field notes can be a remarkable tool for self-discovery.
When you look at what you did for this first exercise, for instance, what do your field notes reveal about what you were drawn to—and possibly why? If your notes seem wildly out of sync with what you would normally find fascinating in this situation, remember to give yourself permission to pursue what you find interesting in the way that you do so. We often start off trying to second-guess and fulfill others’ expectations. However, if your goal is to do fieldwork in a more innovative and potentially effective way than your teachers (including yours truly), you’ll need to absorb and learn everything you can from them and then move beyond it. We should incorporate others’ expectations to surpass them. Follow your own nose in deciding what path to follow—or what trail to blaze.

In that vein, when you look at your notes, can you tell what your personal goals were for the observation session? Was it simply to get a feel for what’s going on? Was it to collect systematic data of some kind? Do your notes reveal anything about what you can handle in terms of the observational venue or challenge you selected for yourself, as opposed to one you might try in the future? Keep in mind that you may need to select a different field site, given your goals, if you continue to feel frustrated by a possible mismatch.

Your notes may also reveal if you’re struggling to find the right balance between watching and note-taking. They may provide clues about how comfortable you are in relying on memory alone for details—and how hard-pressed you might be to convince others of what you saw because of it. As you write your reports, keep an eye out for the possibility that you are trying to remember too much, relying on notes that are too few. If that’s the case, decrease the duration of your watching and give yourself
more time to write up what you just saw.

Overall, when you look at your field notes, what kinds of collecting, recording, and re-presenting skills could you add to your current bag of tricks to strengthen what you already do well? Start by cataloging the choices you see for how you recorded what you saw. Did you use only words or did you use more visual forms of note-taking too? Did you use any digital technologies, collecting visual or auditory information via some device? What do you learn by comparing the techniques—and possibly languages—you used to capture what you were seeing? Are some more effective for you in certain situations than others? The choices that multilingualists make in their field notes are fascinating, often seeming to reflect the language used when the individual first learned about a concept or action—sometimes the mother tongue, sometimes the language spoken at a school of higher education.

What do you learn by comparing the techniques you used to capture data with those you used to communicate it to others? It’s not just the difference between these modes of communication that are interesting; it’s also whether or not there is a cost to giving up what you did in your note-taking phase when you moved into the report-writing phase. Do you think you gained or lost anything in the translation process as you fleshed out and typed up—perhaps even computer modeled—your findings? Nuances captured in our scribbles and our messy sketches may be lost when we turn them into nice, tidy computer renderings, although these cleaned up, digital versions may well allow us to better communicate our intentions to others.

Was there anything that, in hindsight, you didn’t notice or make a record of while you were in the field that you regretted later on? It’s as important to note how you react
to and treat information when you discover it’s missing as how you respond to it when it’s present. If you realized something was missing, what was your reaction? Did you try to reconstruct the information another way? To fudge it over and either ignore its absence in your write-up or make up something plausible to fill the gap? Did you decide simply to remember the frustration and dedicate yourself to getting what was missing next time? The last is your best choice. I would far rather see a student’s notebook with a page dotted with blanks and question marks than with feasible but made-up claims and camouflaged suppositions. If you do fill in any blanks with things that you did not directly witness but seem plausible, be clear that’s what they are. Your best guess can be really important sometimes, as long as you indicate that’s what it was.

One very simple thing that affects what we see and what we miss is our field of view. Did you include your location and position in your notes? If you are close to your subjects, you will be able to see facial expressions, nuances of body language, and micro-elements of how certain things are done—but only by one or two individuals, perhaps. If you are farther away, you might be able to see overall patterns of movement and activity among a larger group and area of space. Comings and goings are best seen with a wider lens, and you might notice these matters by sitting farther away from your subjects. Did you find yourself changing your viewpoint during your session and did the things you were interested in, or the ways you addressed them, change accordingly? Do not forget to make a note whenever you shift your viewpoint. This, too, will help you make sense of your data as well as what you are drawn to at different times.

Whatever you did for this first exercise, you might
think of it as a baseline in how you capture and share what you’ve seen—possibly a starting point for a stronger, more complete fieldworker’s toolkit in the not-too-distant future. As you progress through these exercises, respond to them freely, meeting each challenge with as much creativity as you can. It will not do the body of scientific knowledge much good if all we do is keep cloning ourselves. This is fine for passing on canonical knowledge and ways of thinking. It’s not so great for generating new content, new methods, and new approaches.

Take one more look over your report for Exercise 1. Now, pay special attention to the things you did well. I do not expect anyone to do any of the following in this first exercise. However, it’s a very good sign if your report included:

- Some contextual information, including details like where you were, what was going on around you, the time, the temperature, the feel of the place, how many subjects you observed, who and where they were, and so forth
- The time that something happened
- The duration of an activity
- Any other kind of measurement
- Descriptive details of the environment and the objects found in it
- How something happened, not just what, generically, it was
- Information conveyed via a sketch, diagram, or photograph instead of words
- Mention of something that changed for you, as an observer, and that affected your ability to watch what was happening
• A time you took a guess at what was going on—and indicated that it was a guess
• A question for yourself, clearly indicated as such
• An observation about yourself, and your process, as a fieldworker
• A differentiation between your raw notes and what you might have added to them later on, while writing your report (e.g., this could be as simple as including scanned copies of the raw field notes with your report or, in the report itself, using different fonts or colors, etc., to indicate what was a raw note and what was additional material, added afterward)
• An indication that you recognized that you had attributed a motive or emotion to a subject without really knowing if that’s what she or he thinks/feels

The rest of the exercises will give you tasks that are much more specific, becoming more difficult as they proceed. I’ll address the conceptual, mechanical, and communication challenges associated with each to systematically develop your sophistication in all these parts of the fieldwork process. I hope the exercises will not only help you develop some new skills but also to convince you why a more directed, well-planned, and focused mission for each day in the field can be so useful for any fieldworker.

You may now wish to take a look at some sample responses to this exercise produced by my previous students. Along with a few brief comments about each response, you will find their responses at http://global.oup.com/us/watchingclosely.

Note

1. In general, the reason you normally would take the time to write up
your field notes is that weeks or months down the road, you will be much better able to remember what happened on any given day if you read the second, “written-up” set of notes than if you looked at your original scribbles. If we are working on teams and have agreed to share our daily insights from the field, this written-up, fleshed-out version of our notes is often mandatory. Our field notes are unlikely to make sense to anyone else on the team.