

## **Note taking: A lesson for Novice Qualitative Researchers.**

Margaret Tinny Muswazi<sup>1</sup>, Edmore Nhamo<sup>2</sup>

<sup>1</sup>(Department of Health Sciences, Faculty of Science and Technology, Zimbabwe Open University, Bag MP 1119 Mt Pleasant Harare, Zimbabwe)

<sup>2</sup>(Department of Health Sciences, Faculty of Science and Technology, P.O Box 3550 Bulawayo, Zimbabwe Open University, Zimbabwe)

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**Abstract:** *Although the information can be used in other circumstances, the intention of this manuscript is to assist students and other people who are beginning to get involved in qualitative research on how to take notes. It clearly shows that note taking is not composition writing or a word to word transcription of what is said by someone as may be common with students in many lectures. It shows that note taking is the strategic selection of information that can be used to remember the scenario existing at the time in question. Information was collected through document analysis of well known authors on research such as Denzin and Lincoln; Best and Kahn; Gall, Borg, and Gall and others, as well as from observation and experience of the authors. The paper discusses taking down written notes, tape recording and videotaping as forms of note taking. The advantages and constraints posed by each form and against the other are highlighted. The conclusion made is that resources and expertise permitting, videotaping becomes the best mode of note taking.*

**Keywords,** *Note taking, novice qualitative researchers, tape recording, videotaping, written notes.*

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### **I. Introduction**

This write-up will begin by stating what a couple of authorities believe is note-taking and then go on to address other issues relating to the same. Best and Kahn (1998) say note-taking is putting materials in a form that can be recalled and used in the future. They say that notes will result from speeches, lectures, class discussions, conversations, from solitary meditation and from reading references. They also say that when writing term papers and research reports notes resulting from reading are most significant. In addition, they advise that note taking should be systematic in order that what is read is not forgotten quickly.

Gall, Borg and Gall (1996), say that one can use a laptop to keyboard notes directly into the interview guide. To emphasize the importance of note taking to researchers, Ostrower (1998), suggest that inexperienced researchers should be given notes taking training before they go into the field so that they can start research as early as possible. Saunders (2003), who also calls it a notebook of ideas points out that it is one of the usual methods for preserving information collected in interviews and which can be hand-written directly onto the copy of the interview guide. Lastly, Wolfinger (2002) makes it more applicable and says that note-taking is a very important process in ethnographic research.

Good field notes should be descriptive to include verbal portraits of the participants, a reconstruction of the dialogue, and a description of the physical setting as well as accounts of particular descriptions of the observer's behaviour. Notes should also be reflective enough to include reflections of methods of data collection, analysis, reflection of ethical dilemmas and conflict as well as reflection of the observer's frame of mind and emerging interpretations. Notes should be detailed and concrete i.e. not vague and over-generalized. It is important that they include visual details when appropriate. Gall et al (1996) advise that there is no need to limit notes to words only and that they can also include sketches and diagrams.

### **Uses of Notes**

Notes can have many uses in research. Raimond (1993), in Saunders (2003), points out that notes are useful when you compare projects as you use them to get an idea of what project to do or not do. Notes are unique to yourself and they can help you understand as mentioned above, projects, as you compare them. Your notes will help you identify what you would like to follow or not follow. They can also help you set parameters against which to evaluate possible research ideas. This means therefore that even when two people are reviewing the same projects, their notes may not be the same because they may be looking for different things in the projects. Sometimes even when they are looking for the same things, they may differ in what they consider important and essential; thus their notes may be different hence the uniqueness being referred to in Saunders (2003).

## II. How to write notes

Several suggestions of what to include and what method to use for note taking are offered by various authorities. Below is a selection of suggestions considered useful for this paper:

- ✓ Include the topic, complete bibliographic information and summary (Charles, 1988). You cannot always be assured to find the sources of the information you obtained some time ago e.g. from the internet as it may be removed by the time you go back to it so, the advice to include bibliographic information for instance, should be taken seriously
- ✓ Even if you are not able to make complete field notes right away, you should at least try to write a summary of the sequence of events and noteworthy statements
- ✓ You can use this summary to stimulate your writing of a more extensive set of notes
- ✓ Skim the reference source before taking any notes so that you can decide what materials to take down (Best and Kahn, 1996)
- ✓ Use 4 inch by 6 inch (10cm by 15cm) index cards which can easily be sorted by subject headings. Cards are a better option to sheets of paper and they should be of the same size and they can be easily reorganized into various categories (Best and Kahn, 1986; Charles, 1988).
- ✓ Larger cards may have the advantage of carrying more notes, but may be less convenient to carry around.
- ✓ File each note card under a definite heading and place the subject heading at the top of the card.
- ✓ Include only one topic on a card for the flexibility of organization and filing
- ✓ Be sure that notes are complete and clearly understandable for they are not likely to be used for some time after they have been taken.
- ✓ Do not plan to recopy or type your notes as it wastes time and increase the possibility of error and confusion.
- ✓ Keep a supply of note cards with you at all times so that you can jot down ideas that come to you while waiting, riding the bus or listening to a lecture or discussion (Saunders says researchers can also get ideas while they sleep) *like musicians claim they dream about lyrics* (mine).
- ✓ It is also advisable to make photo static copies so that they can be examined more efficiently at home.

Denzin and Lincoln (2002) give examples of how to use cards. They say for instance that, you can organize your cards by author name or alphabetically or by topic. They give the following bibliographic information for journal articles:

1. Author's name - last, first, middle initial
2. Date - year and month
3. Title of journal article
4. Publication - underline title of the journal or agency that published the document
5. Volume of the journal, underlined
6. Page numbers of the article

Denzin and Lincoln (2002) suggest listing the following bibliographic information for a book:

1. Author's name – last, first, middle initial
2. Date of publication – year (in brackets)
3. Title of the book (underlined)
4. City – where published, plus state if not a major city
5. Publisher – name of company that published

Authorities talk about several types of notes e.g. note book, footnotes, field-notes etc. For example Best and Kahn (1989) classify reading notes as quotation, paraphrase, summary and evaluation. Note book and field-notes have already been addressed earlier. Footnotes have been treated by different authorities in varying ways. Oliver (2003) refers to them as additional material, which may be inappropriate to place in the main text. Oliver says footnotes can be supplementary to principal arguments of the text, may consist of additional specialist references, may be put at the bottom of the relevant page, may be put at the end of the thesis or, may be put in notes at the end of each chapter.

Addressing the issue of selection of where to place footnotes, Oliver (2003) suggests that it may depend on the individual or university preference. One can use superscript numbers in the text alongside the issue to which the number refers and numbering should proceed sequentially throughout the chapter and recommences for the next chapter. Lastly, Oliver (2003) adds that additional materials may be placed at the bottom of the page, footnotes may be collated in numerical order at the end of the chapter and may also collect

all notes at the end of the thesis while arranging them in order of chapters. Therborn (1982) further suggestions are that you can type these notes immediately prior to the final list of references for the thesis. However, some readers find superscript numbers disturbing as they try to read especially when they are attached above words.

### **Advantages and disadvantages of note writing**

Note writing like other methods of note taking has some advantages, chief among which is that it facilitates analysis. Information is already classified into appropriate response categories by the interviewer, (Gall et al 1996), and it is readily accessible. However, there are also some disadvantages. Note writing may prevent the respondents from giving information for sensitive and confidential issues because they do not want it recorded. In an attempt to maintain the respondents' comfort, sometimes the interviewer may have to delay note taking until the end of the interview or after the respondents have left. There is a risk though that the interviewer may forget important details especially those that differ with those of the interviewee's.

In some settings an observer taking notes on tablet or notebook might distract participants or cause the observer to miss important aspects of events. Note taking might disrupt the effectiveness of communication between the interviewer and the respondent. Gall et al (1996), say that when questions deal with simple factual information, respondents expect their answers to be written down and may appear upset if they are not. For example, if a researcher is studying a particular culture, and a respondent makes a claim he/she feels he/she has authority over, such as claiming that in their culture, they do not view the dead, but the interviewer does not write the information down, the respondent is likely to be upset or offended. Also if issues being dealt with are of a rather sensitive or confidential nature, respondents may be perturbed by note taking.

### **III. Video Taping**

Microfilming and microfiche is also a good idea (Best and Kahn, 1989). Many good libraries offer this facility. Today, many people carry mobile phones with them and most of these have a camera feature built in them or even small digital cameras. These can help in capturing large chunks of information in a short space of time and you can deal with this material at a more relaxed time.

When we consider the disadvantages of note writing, particularly where it comes to the laborious work that has to be done, the disruptions it can cause during say an interview, the inconveniences to communication between interviewer and respondents, the omissions of detail that can happen etc., we will understand Charles' (1988) concern that there are challenges in recording focus group data as people may overlap when speaking, making it difficult to say who said what. In such cases, videotaping is a more efficient option.

Videotaping may be referred to as consolidation (Denzin and Lincoln, 2005). The mobile phones and small digital cameras referred to above can come in hand. It is useful for recording field notes, interviews, codes, memos, annotations, reflective remarks, diagrams, audio and video-recordings, demographic variables and structural maps of the data and the theory all in one place. It can be a tremendously powerful support to the analysis process. Denzin et al (2005) says videotaping allows the researcher to move from one intellectual activity to another with minimum effort. Denzin et al (2005) emphasizes that while he/she does that, the researcher is able to both free up large amounts of energy for the critical tasks and help him/her to see and keep track of connections that might otherwise easily fall through the cracks.

### **Advantages of Video Taping**

You can have two or three researchers plus a moderator attend and take focus group notes at the same time (Wilkinson, 1999). In addition, the researchers may focus their notes on different aspects e.g. non-verbal behaviour, group dynamics and emergent themes. Videotaping is important to capture non-verbal data. It accurately identifies speakers and all they say, thus it addresses the challenges raised by Charles (1988) above. Recording provides access to nuances of the discussions which may ordinarily be omitted in note taking. It has the ability to replay the session during analysis as well as allowing you to transcribe focus group discussions accurately long after they have happened.

### **Benefits of Video Taping**

Videotaping has many benefits in itself as well as when it is compared to note taking. The benefits are as follows:

- ✓ It has the ability to produce large amounts of data on the topic in a space of short time.
- ✓ It can allow access to topics that might be unobservable.
- ✓ It can ensure that data directly targets researcher's topic (there is no chance of confusing who said what).
- ✓ It provides access to comparisons that focus group participants make between their experiences.
- ✓

#### **IV. Tape Recording**

Gall et al (1996) describe tape recording as one of the two most usual methods for preserving information collected in interviews. They also confirm that it has more advantages over note taking. You can tape record speeches, lectures and conversations of participants in a study among other occasions. Gall et. al. (1996) advise that telephone interviews can be recorded by means of connecting a duplex to the phone and the tape recorder. The device will facilitate recording as soon as the phone is picked up and that you may need to transcribe such conversations by using a typewriter or word processor. More common today is the use of the computer and other gadgets similar to it for that transcription as the typewriter has become a thing of the past. Gall et. al. however give a warning that recording phone conversations is illegal if one of the parties involved is not aware that it is happening, (research ethics). So, it means before tape recording takes place, all the parties involved need to be made aware and possibly give their consent for it.

#### **Advantages of Tape Recording**

The following are some of the advantages of tape recording in qualitative Research:

- ✓ Most importantly it reduces the tendency by the interviewers to unconsciously Select data favouring their biases.
- ✓ Provides a complete verbal record.
- ✓ Can be studied much more thoroughly than notes.
- ✓ Speeds up the interview process as there is no need for extensive note taking.
- ✓ Two or more trained data analysts can listen to the tape or read the transcript and code it independently (Gall et. al., 1996).

#### **Disadvantages of Tape Recording**

While tape recording has been seen to have many advantages, it seems that it also has some disadvantages, some of which are listed below:

- ✓ The presence of a tape changes the interview situation to some degree.
- ✓ With personal issues, respondents may be reluctant to express their feelings freely if they know that they are being recorded (Gall et. al., 1996).
- ✓ The interviewer should explain carefully the purpose of recording and gain confidence of the respondents so as to minimize any undesirable effects of having the interview recorded.

#### **V. Conclusion**

It has been noted that note taking in qualitative research can be done in a variety of ways and can also be used in a variety of ways e.g. for beginning researchers. Note taking can be done during interviews, during and after focus group discussions and during observations. Three categories of note taking were identified viz note writing, tape recording and videotaping. It has also been pointed out that all three forms of note taking has both advantages and disadvantages, and note writing seems to have more negative effects on the data collection method than the other methods discussed here which are tape recording and videotaping. For instance, its inability to capture all detail especially in focus group activity as well as its disruptive tendencies in interviews, have been cited as major disadvantages to the researcher and may be even to the participants as well.

It has been made clear in this paper that videotaping is a method which can take in much more detail than note taking and tape recording separately, but which also may require some expertise. It has been shown as well that while tape recording is a method which is able to record more than one person speaking at a time, it has been pointed out that it may also have some legal implications so precautions should be taken.

#### **VI. Recommendations**

The paper makes the following recommendations for consideration by novice qualitative researchers:

- ✓ Resources permitting video taping should be the preferred method of note taking as it offers more advantages than all other methods.
- ✓ Sponsorship for the purchase of video and tape recorders should be sought in order to enable beginners in qualitative research to capture all the necessary details as they collect data (assuming that some researchers may find the cost unaffordable).
- ✓ Researchers should affiliate to relevant research groups both within and outside their institutions where they can access some of the equipment when they need it as well as the training for it.

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