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# Enhancing the Value of Qualitative Field Notes Through Purposeful Reflection

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## Enhancing the Value of Qualitative Field Notes Through Purposeful Reflection

### Abstract

This commentary outlines the efforts taken to provide doctoral students with purposeful reflection questions to help them enhance the value and utility of qualitative data. It is based upon experiences teaching a doctoral level qualitative research methods course for students enrolled in an executive format doctoral program. Reflexivity of the researcher, reflection, and research design decisions are discussed. Suggestions for purposeful reflection questions are also discussed and listed in four categories. The categories of purposeful reflection questions include (1) Research Setting Access, (2) Examining Norms and Cultures, (3) Positionality of Research Subjects, and (4) Positionality as an Observer. These four categories of questions provide a paradigm that could help many qualitative researchers take a more systematic in-depth approach to the collection, transcription, and analysis of field notes and other forms of qualitative data.

### Keywords

Field Notes, Reflection, Data Validation, Positionality

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## **Enhancing the Value of Qualitative Field Notes Through Purposeful Reflection**

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Professors of qualitative research methods seek new methods to help novice researchers embrace their philosophical lens, personal epistemology, and bias as they embark on their first efforts to collect, interpret, and analyze qualitative data. Students as novice researchers, seem to be in conflict with their ideologies regarding data validity, trustworthiness, or credibility.

We recently co-taught a doctoral level qualitative research methods course for students enrolled in an executive format doctoral program. The course included both K-12 and higher education practitioners with various career experiences including instructional and school leaders, student affairs professionals, and postsecondary faculty. Throughout the course, we sought methods to help students think more deeply about their qualitative field notes thus developing their critical thinking skills. Our efforts were motivated by the desire to help doctoral students more truly understand the research phenomenon they would investigate, develop a robust data source for triangulation purposes, and perhaps, most importantly, improve qualitative data validity and reliability. This commentary outlines the efforts we took to provide our students with purposeful reflection questions to help them enhance the value and utility of qualitative data.

### **Reflective Practices in Qualitative Research**

#### **Reflexivity and the Researcher**

The value of using reflective practices in qualitative data collection is documented in the literature base (Oliver, Serovich, & Mason, 2005; Ortlipp, 2008) and in reflexivity, enabling researchers to share their background and provide insight into how a researcher both interprets data from the study and explains what was gained from the study (Creswell & Poth, 2017). It is important to define what is meant by reflective practices in empirical research. Reflective research is related to how the researcher interprets empirical data; no data source is in itself neutral. All data is being interpreted by the researcher via measurement, observation,

interviews, or analysis of secondary data. A second element of reflective research is more retrospective. It is focused on the effect of the research on the researcher (Attia & Edge, 2017). There are many approaches to reflectivity in empirical research, and each pathway or approach carries strengths and weaknesses. These are often determined by opportunities and costs. The researcher must determine what type of reflective practice they will engage in so that they can make a deliberate choice about the type of research in which they will engage (Finlay & Gough, 2003).

Guillemin and Gillam (2004) asserted that reflexivity in research impacts the kind of knowledge produced and how that knowledge is generated. In speaking of ethical decisions in qualitative research, Guillemin and Gillam argued that a reflexive researcher is aware of factors that influence the research and can “step back and take a critical look at his or her own role in the research process” (2004, p. 275). As professors of qualitative methods to a group of novice researchers, we share this same concern. Although we had spent time in class helping students to identify, articulate, and own their interpretive lenses and implicit bias, we struggled with the process of getting many students to fully become aware of their positionality. Many of our students were scholar practitioners and thus struggled with the process of managing the impact of their positionality on data collection, analysis, and interpretation. We knew that our students needed a means by which to think more critically about the data they had collected, specifically through observations and field notes. Bourke (2014) offered advice about how to manage positionality as a qualitative researcher, specifically the management of insider and outsider roles. Bourke suggested that the researcher’s positionality should be addressed with all participants and that the researcher cannot operate off assumptions related to physical attributes. Bourke also suggested that qualitative researchers be clear about motivations for data collection with themselves and their participants.

There have been increased emphasis on the role of reflexivity in qualitative research in the published literature. For example, Jootun, McGhee, and Marland (2009) asserted that reflexivity should occur throughout the study and thereby assist with making the qualitative data collection process open and transparent. Gabriel (2015) further commented about the consciously reflective researcher who is aware of the impact of their work in the field and how the research portrays underlying values. Ultimately, the consciously reflective researcher will emerge as different subjects. Berger (2015) argued that “the researcher must remain constantly alert to avoid projecting his or her own experience and using it as the lens to view and understand participants’ experience” (p. 330). Berger also advocated the use of three practical measures including the use of a research log, repeated review, and peer consultation. The use of repeated review after a lapse in time allows the researcher to “view the same material through a ‘new lens’ and identify where one’s own experience interfered with accurately understanding interviewee’s report” (2015, p. 330).

It was our concern that students would merely gloss over field notes and would fail to take adequate time to allow the notes to become critical to the reflective process that should be utilized by qualitative researchers throughout the research process. Valandra (2012) argued that reflexivity can be useful to qualitative researchers while conceptualizing a study, while implementing a study, and while analyzing and writing a study. We concur and posit that with field notes in particular, reflective practices can prove to be useful to help qualitative researchers make meaning out of the data they have collected through empirical processes. We see greater reflective processes as an effort to examine positionality.

We were concerned that our students needed tools to make their field notes richer and thus a robust data source. It is our concern as qualitative researchers that field notes are often seen as a lesser form of qualitative data and are merely used to claim that data triangulation has occurred for validity purposes. The need for acceptable methods to triangulate data was documented by Mathison (1988) who explained that data may converge, be inconsistent, or be

contradictory. Creswell and Miller (2000) asserted that triangulation is a validity method where the researcher seeks convergence among multiple and difference sources of data. While only the researcher's lens is utilized, the method provides for corroborating evidence. The practicality of triangulation as an analysis technique was emphasized by Leech and Onwuegbuzie (2007) who called for at least types of data analysis tools to triangulate data. Given the documented importance of triangulation as a data validation strategy, we felt it was important to offer suggestions to improve the quality of field notes as a data source that could be triangulated by researchers.

### **Research Journals**

We concur with Ortlipp's (2008) statement that using reflective journals allows the researcher to make their experiences, opinions, thoughts, and feelings visible. It was our concern that our students, like others in classes we have each taught before, would simply gloss over qualitative data, particularly their field notes. We felt very strongly that students might decide that field notes are a secondary, less informative, or less valuable component of qualitative data. Orange (2016) explored the use of reflective journals among doctoral students who are learning qualitative research and cited that many do not use journals in their reflective practices. Orange stated that structured guidelines and prompts may improve details contained in reflective journals, thereby increasing the level of engagement in research.

Cruz (2015) examined how she dealt with subjectivity of the qualitative research process through self-reflexivity. Citing both explicit (conscious subjectivity) and implicit (not so conscious), Cruz explains how the use of field notes facilitated a self-reflective process of the implicit dimension that enabled the development of "a new sensitivity to be alert of my own assumptions" (2015, p. 1725). Cruz urged researchers to be "constant and systematic" (2015, p. 1733) throughout the reflective process. Like Cruz, we wanted our students to embrace both their explicit and implicit subjectivity through a process that allowed them to apply logic and reason to become more comfortable with qualitative data. It was our desire that students as novice researchers embrace their positionality in qualitative research. We posit that qualitative researchers' ability to understand their positionality is connected to their understanding and embracing of their explicit and implicit bias. Qualitative researchers should be aware of their positionality throughout the design, data collection, data analysis and reporting of the study. Awareness of one's positionality enables the researcher to exercise proper reflective practices to ensure accuracy of research findings.

### **Reflection and Research Design Decisions**

Mruck and Breuer (2003) explained that reflection serves to disclose presuppositions, choices, experiences, and actions during the research process. They posit that these discussions are of necessity "because without such reflection, the outcomes of the research process are regarded as 'characteristics of objects,' as 'existing realities,' despite their constructed nature that originates in the various choices and decisions researchers undertake during the process of researching" (Mruck & Breuer, 2003, p. 192). As qualitative researchers, we have often seen a disconnect between the methods utilized and the novice researcher. Rather than a full contextualized understanding of the phenomenon, some qualitative researchers—particularly novice researchers—fail to understand the naturalistic components of the research environment. The context of the setting is often misunderstood, misrepresented, or otherwise distorted.

In their 2002 critical examination of reliability and validity techniques for qualitative research, Morse, Barrett, Mayan, Olson, and Spiers (2002) called for paying attention to rigor

throughout the research process. They proclaimed that “the researcher’s creativity, sensitivity, flexibility, and skill in using the verification strategies determine the reliability and validity of the evolving study” (p. 20). We posit that integration of purposeful reflection, grounded in robust researcher reflexivity, can help improve study validity and reliability—thereby strengthening the quality of research produced. As more advanced methods to ensure validity and reliability of qualitative data are called for and implemented, we argue that purposeful, in-depth reflection can assist qualitative researchers in meeting standards of qualitative data validity and reliability.

### **Observation and Field Notes**

Maxwell (2012) argued that “observation can enable you to draw inferences about someone’s perspective that you couldn’t obtain by relying exclusively on interview data” (p. 94). We were very careful to advise our students to not think of observations and the field notes yielded as merely a required secondary data source for triangulation or other data validity needs. We wanted our students to understand the value of field notes and understand as Kawulich (2005) explained that field notes serve as a record of activities or ceremonies observed and informal discussions from the field. We wanted our students to understand the value of ceremonies and traditions in many qualitative research settings. We did not want them to misinterpret the phenomenon under investigation or not have the proper context to analyze interview data because they failed to understand the dynamics, activities, or ceremonies in the natural research setting. This was a concern for us because we had both worked with novice qualitative researchers in the past who struggled to understand the context in which research was being conducted and missed valuable insights and understandings from the data collected.

We also wanted our students to be comfortable with the various types of field notes. Neuman (2011) identified types of field notes used in qualitative data collection. Types of data included jotted notes (short memory triggers), direct observation (written immediately after leaving the field), inference (reflecting social relationships, emotions and meanings), analysis, (methodological strategies and theoretical notes), interview notes (information about interview location and interviewee), and personal journal (personal feelings and emotional reactions). Our efforts to utilize reflection with our students was intended to help students develop field notes that could be used for inference purposes. This process would in turn support the creation of analytic notes and yield insightful qualitative data to ensure a complete understanding of the research setting and phenomenon. Neuman (2011) cautioned researchers to ensure that inference be separated from the other process so that the researcher keeps observations, inferences and beliefs separated. We agree that such a separation must exist for data validity and reliability purposes; however, we feel that this separation often creates a mental barrier among researchers, particularly novice researchers who are unable to reconcile the objective and subjective to ascertain the underlying meaning or context and not misinterpret data.

### **Positionality of Research Subjects and Positionality as an Observer**

The reflective questions related to positionality that we present provide a method for the researcher to examine positionality of the research subjects and themselves as observers. We view that reflection about positionality between research subjects and researcher provides a means for researchers to embrace both their explicit and implicit subjectivity about the occurrences within the research setting and from within themselves. While we do not claim that it is possible for researchers to fully understand the positionality of the research subjects in their setting, we posit that our questions would enable researchers to manage the bias that accompanies explicit and implicit subjectivity. We posit that the researcher can best understand

the positionality of research subjects through careful and critical reflection of their own positionality including taking ownership of their interpretive lenses and bias. While many of our students are familiar with the types of research settings in which they would conduct their research, we cautioned them to not make any assumptions based upon their experiences from similar settings. To do so would discount the phenomena experienced by the subjects in which they conduct their research. A closer understanding of positionality is a mechanism by which to prevent that possibility.

### **Our Approach to Purposeful Reflection**

To guide students through more rigorous critical reflection of what they observed, we provided reflection questions that were meant to allow students to recall both the tactical (hands on) experience of observing and explore the abstract (reflective) insights about what is occurring in the research environment. We felt that our students needed to be prompted to examine the research setting more critically. The work of Alvesson and Sköldbberg (2017) supports our strong disposition that our students as novice qualitative researchers needed to examine their research more critically. Alvesson and Sköldbberg (2017) identified four elements of reflective research that are listed and explained below.

1. Systematics and techniques in research procedures that ensure well-reasoned logic for interacting with empirical evidence.
2. Clarification of the primary of interpretation as a means to connect with theory and pre-understandings.
3. Awareness of the political-ideological character of research which are usually not neutral, but highlight the dimensions of construct, political and ideological conditions.
4. Reflection in relation to the problem of representation and authority so that researcher's claim to authority and texts claims to reproduce some extrinsic reality are not undermined.

### **Purposeful Reflection Questions**

The following are the purposeful reflection questions that we provided to our doctoral students. These questions were informed by both our personal experience as researchers and the challenges we saw with other novice graduate student researchers in the past.

#### *Research Setting Access*

- Did you enter the research setting with any expectations?
- How easy was it to enter the research setting?
- Did you have to become a member of the group to enter?
- How did you exit the research setting?

#### *Examining Culture and Norms*

- What were the norms in the setting?
- How would you describe the culture of the setting?
- Was there a display of power in the setting? Who controlled it?

- Did you notice the composition of the people in the setting (e.g., gender, race, social class, etc.)? What did it tell you about the dynamics within the setting?

#### *Positionality of Research Subjects*

- What roles did people play? What actions were aligned to those roles?
- Were there groups? Subgroups? In group? Out Group?
- Were you a part of any group as the observer?

#### *Positionality as an Observer*

- How did you feel before, during, and after the observation?
- Did people realize you were observing others? Were you observed?
- What was your vantage point as an observer? Did you yield any vantage points to your research subjects or co-researchers?
- How did your vantage point impact your insight and understanding about what you observed?

### **Discussion**

We present our reflection questions in four categories as means by which to reframe how researchers view field work in qualitative data. While we do not claim that our questions are comprehensive, we feel that they are succinct enough to allow researchers, including novice and experienced alike, to begin to examine research environments more critically to deduce meaning and properly represent the phenomenon experienced by research subjects. We assert that these questions can help researchers to manage bias, both implicit and explicit, and moreover ensure that the research setting is not misunderstood, misinterpreted, or misconstrued.

#### **Research Setting Access**

Access to research settings has been an issue that research methodologists have written about extensively (e.g., Rossman & Rallis, 2016; Seidman, 2013). Our reflection questions about this very common practice among qualitative researchers is meant to uncover bias by examining expectations, reconciling struggles with access and rapport, and measures taken to properly exit the setting. We posit that the researcher should pay careful attention to dynamics how they negotiate and maintain access to fully understand and represent the phenomenon within.

#### **Examining Norms and Cultures**

We have come to value the importance of cultural norms within qualitative research settings, particularly those to which we are not members. With that in mind, we sought to help our students understand the value of ceremonies and traditions in the naturalistic environments in which they would conduct their research. Perhaps most importantly, from an ethical perspective, we did not want our students to misinterpret the phenomenon under investigation. To properly understand the phenomenon, we wanted our students to understand the dynamics, activities, or ceremonies in the natural research setting to the best of their ability. The majority of our students were novice researchers and practitioners in education leadership or higher



education as well. We cautioned them to not make assumptions about any of the occurrences within the settings in which they would conduct their research. We cautioned them to identify the evidence that explains the phenomena that they will study. Our reflective questions regarding norms, power, culture, and dynamics are intended to empower the researcher to look beyond the surface by immersing themselves into the inter-workings of the research setting thereby allowing them to embrace the contextualized meanings within.

### Conclusion

While this article chronicled our efforts to help students enrolled in a doctoral level qualitative research methods course embrace the observation process through the collection of robust field notes and use reflexive practices to improve meaning of this form of qualitative data, we assert that these techniques could be used by experienced researchers. The guided questions we offer are not universally applicable to all research settings; however, they do present a model that could be used in various settings. We assert that the categories of our questions including (1) Research Setting Access, (2) Examining Norms and Cultures, (3) Positionality of Research Subjects, and (4) Positionality as an Observer, provide a paradigm that could help many qualitative researchers take a more systematic in-depth approach to the collection, transcription, and analysis of field notes and other forms of qualitative data. We encourage others to take adequate steps to ensure that the naturalistic research setting is not misunderstood, misinterpreted, or misconstrued when presenting research results to expand upon the body of knowledge. In an era where reflexivity of the researcher coupled with the enhanced understanding positionality, it is important that qualitative researchers further embrace and apply methods and techniques that further ensure the credibility of the researcher and the value of the data that is collected through observations in the field. We feel that our questions are designed to engage researchers in effective reflective practice so that they challenge predispositions about research topics, research subjects, initial interpretations of data, and recognize bias and further understand how their positionality informs their research practice.

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