

## Observational Field Notes

During any observation, introduce yourself to the people you wish to observe. Give an honest explanation for your motives and how you will use the information gained from your observation. Obtain verbal permission from all involved parties and record their names (and contact info if possible). If specific parties do not wish to be recorded or wish to remain anonymous or pseudonymous, you must honor those wishes. Above all else, practice honesty and transparency so your study treats all parties ethically, humanely, and with respect.

During an initial observation, you might try to let the subjects of your observation forget about you, as though you are observing from the perspective of a fly on the wall. During subsequent observations, you might want to get more involved via “participant observation,” joining in the activities, watching more closely, and even asking questions. Of course, you might only be able to observe a particular site or population once. Either strategy can be effective; decide carefully which approach will work best in each scenario.

It’s your choice if you wish to type or write your notes; typing is faster but more conspicuous, making it more difficult to obtain accurate observations. Writing also makes it easier if you need to draw diagrams, etc. for your own reference. If you write, type up all of your notes as soon as possible after this observation so you can capture everything as accurately and thoroughly as possible.

Remember that your observations need to be concrete and specific. Use quotations or even diagrams when necessary.

You can organize your notes for your reference in whatever way works best for you: by topic or concept or just chronologically. Ultimately, you want these notes to be an easy reference for you to look back on. Consider writing everything out and then re-organizing things conceptually when you type it all up.

Remember to write down:

- Date, time, and place of observation (YOU MUST GET THIS.)
- Names whenever you can (as well as any other relevant details about the people being observed)
- Specific facts, numbers, details of what happens at the site
- Specific details regarding the site itself and how that affects human interaction
- Sensory impressions: sights, sounds, textures, smells, and tastes
- Personal responses to the fact of recording fieldnotes (How do the members of this site respond to your presence as an observer? How do you feel observing at this site?)
- Specific words, phrases, summaries of conversations, and insider language (Write down direct quotes whenever possible but try not to interrupt so you can “catch up.”)
- Body language or other non-verbal cues of people you observe
- Concrete examples regarding other markers of identity (clothing, behavior, reactions toward members within the group and outside the group)
- Questions about people or behaviors at the site you’ll want to ask when you return
- Page numbers to help keep observations in order

Type up all of your notes as soon as possible to capture all of it as vividly and accurately as possible.

Again, organize your notes in whatever way will serve you best, but make sure they are organized in a logical fashion and that the final version of your notes is understandable to you later on in your process.

## **10 Principles of Ethical Interviewing and Observing**

1. **Accuracy:** Your job is to present factual—not fabricated—information. Do not misrepresent the intended meaning or message of your interviewee or of the people you observe. Also, recognize and acknowledge that your study might not be representative of this entire subculture, population, etc.
2. **Fairness:** Present facts, not indictments; do not surprise your interviewee or observation subjects with the final product. Don't let interviewees give anonymous indictments of others.
3. **Completeness:** Tell the full story; reflect the true complexity of the world.
4. **Honesty:** You must be genuine and candid with everyone with whom you work on the project.
5. **Independence:** Ensure your primary allegiance is to the issue at hand, not yourself or anyone else.
6. **Impartiality:** Be aware that you might introduce or encounter personal bias or strong disagreements with your interviewee or observation subjects. Consider if you are being impartial in your representation of them. Consider if they are being impartial in their representation of others.
7. **Transparency:** Give your interviewee, your observation subjects, and your audience tools to follow up on your work, fact check, etc.
8. **Accountability:** This is your work, not anyone else's, so take responsibility for it.
9. **Respect:** Everyone deserves to be treated with dignity and compassion, even those with whom you may disagree. You cannot pick and choose to whom you give respect. This involves not just your interaction with your interviewee and observation subjects but also the way in which you represent them.
10. **Excellence:** Do excellent work; marry important truths with engaging narrative.

—Adapted from Smith, Jonathan, “The Art of Interviews,”  
Visual Approaches to Global Health,  
Yale University Summer Session, 2019.

## Interviewing Tips

Go into this interview with clear goals for what kind of information you're hoping to get and/or how this interaction will help you answer your research question, but be open to new insights gained, new avenues to explore, etc.

Ideally, you'll record the interview using your phone or some other similar device. If you do record the interview, ask permission of your interviewee first. Then, while recording, get their explicit permission to record this material along with their name and other pertinent details and with your statement of the time, date, location, etc. Even if you record the interview, you should still take notes, but having a recording to listen back to helps take care of some of the groundwork for you. Once the interview is over—but before the interviewee leaves—double check to make sure the recording was successful. Then, after the interview, immediately revisit your notes and the recording to clean up your notes and add to them using the recording while the material is still fresh in your mind. (Ideally, you'd create a full transcript of your interview to use moving forward and then add additional notes to that transcript.)

If you can't or don't record the interview, take especially extensive notes. You might have to ask the interviewee to slow down or repeat phrases. You might also have to be comfortable with long pauses in between questions, but you should not try to type/write down everything that's being said. As soon as the interview is done, revisit your notes and clean them up/add to them while the experience is still fresh in your mind.

Ideally, you'd conduct pre-interviews to get to know your interviewees better and establish a rapport. There probably isn't enough time to do that in this project, so before you jump into your interview, take some time for small talk to put your interviewee (and you) at ease. Ask them something completely unrelated to the interview but easy to answer. This gets them talking and more willing to open up. You could also consider sharing some info about yourself. Talk about the weather. Or your respective plans for the weekend. Put them at ease.

Be honest about the use of this content, including the fact that your paper will be presented to the class, video-recorded, and posted onto our course website as a video and as a transcript. Get explicit permission to use their words and their name (or explicitly find out if you can use their words but only anonymously or pseudonymously). But be sure to write down (in your own private notes) their name, year of study, role within this subculture or location, contact info, and any other pertinent details. Ideally, you'll also record this info and their permission statement.

Your interview is a conversation, so be human about it. You should acknowledge and respond to your interviewee's answers. Be prepared to adapt, change the order of your questions, or introduce new questions, especially follow-up questions when you want more info or clarification or if your interviewee says something intriguing, etc.

End the interview with the "big question" that addresses the main take-away from the interview. Let them sum up the interview. This is often the source of some of the most intriguing/significant content.

Thank the interviewee for their time. Give them the url to the course website (<https://tarheels.live/writinginhealthandmedicinesp2021/>) and an idea of when they can expect to see the project posted. Ideally, run your draft past them for their approval before your final submission. At the very least, be sure they have access to the final, posted draft.

In your final project, you will mostly be paraphrasing your interviewee and observation subjects. As in all cases, you should only use direct quotations when they have stated something better or more succinctly than you could OR if you are interpreting their specific word choice or use of language. There will be times when you should certainly examine their word choice, etc. but a lot of what is said will still need to be paraphrased or summarized. But still be sure to give credit where credit is due; make it clear when you are quoting and/or paraphrasing their words so your audience can differentiate between your ideas and the ideas of the people you have interviewed.

When writing your paper, always be careful to represent the message and meaning of your interviewee and observation subjects accurately and honestly.