Observations and field notes
Recording lived experiences

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Introduction

Observation is a widely used method for data collection in the field of applied linguistics, especially for those involving qualitative research designs. As a foundation research methodology in social sciences (Angrosino & Rosenberg, 2011; Bratich, 2018), it provides researchers with the opportunity to collect ‘live’ and first-hand data from naturally occurring situations around language (Cohen, Maion, & Morrison, 2011). Observation has its origin in ethnographic studies where researchers describe language related events and language behaviours of people such as language teaching and learning experiences, activities, interactions, and various types of communications in relation to emotions and attitudes in different naturalistic contexts such as homes, schools, communities and workplaces. When using the methods of observation, it is critical to decide what to observe or record, how to record and what to present from the rich field notes taken by researchers, and in what ways observation can be used to triangulate with other methods.

This chapter provides a discussion of key aspects of observation by reviewing definitions of observation, different types of observation and the purposes for which they can be used. It further discusses what, when, where and how to observe by studying illustrative examples and examining the role of the observer. The discussions are substantiated by addressing how to produce written accounts as field notes and provide ‘thick descriptions’ of what are observed. Finally, the chapter concludes with a discussion about the advantages and disadvantages of using these tools in the field.

Key aspects

Observation can be defined as “the systematic description of events, behaviours, and artefacts in the social setting chosen for study” (Marshall & Rossman, 1989, p. 79). Within the field of applied linguistics, it can be defined as systematically observing events, interactions, behaviours, relationships and artefacts related to and around language(s) in a given social setting.
Observation was first established in studies of anthropology and sociology (Jorgensen, 2015; Emerson, Fretz, & Shaw, 2011). Early work emerged from anthropologists such as Franz Boas, Edward Sapir, Margaret Mead and Bronislaw Malinowski, who established the field of cultural and linguistic studies with emphasis on descriptive ethnography of non-Western cultures. Because ethnography seeks to describe cultural phenomena that reflect language ideologies, language practices, language habits, human behaviours, emotions and knowledge, it is difficult to define explicitly what constitutes an ethnography (see Wei, this volume). For some people, it is “a family of methods involving . . . richly writing up the encounter, respecting, recording, and representing . . . the irreducibility of human experience” (Willis & Trondman, 2000, p. 5). For others, it is “a particular method [that] involves the ethnographer participating, overtly or covertly, in people’s lives for an extended period of time, watching what happens, listening to what is said, asking questions” (Hammersley & Atkinson, 2007, p. 1).

While these definitions emphasize the importance of recording lived experiences and encounters of individuals, they do not highlight the critical aspects and practicalities of how to record the experiences. Observation is not a random exercise. Cohen et al. (2011) argue that observation is not just ‘looking’, it is always systematically ‘looking’ and ‘noting’. Researchers always come to a research setting with a set of research questions which guide them to choose what to observe (Spradley, 1980; Ciesielska, Bostrom, & Ohlander, 2018). Therefore, it is vital to discuss a few essential features of observation.

- **Physical place**: the actual physical settings, such as classrooms, homes, community centres, playgrounds or institutes. Typically, this involves observing environmental facts of the research location, for example, the number of books available, furniture arrangement in the classroom, different language recipe books in a home, CDs in different languages, pictures and decorations, etc.
- **Social actors**: the people involved, including pupils/teachers, heritage language learners, grandparents/parents, policy makers, community leaders, ‘(non)native speakers’, EALs, multilingual learners, etc. (the social categories of people tend to indicate the status and power relationship between the research participants)
- **Interactions**: language use, including interlocutors and the topics involved in interactions, for example, medium of instruction, teacher/pupil talk, verbal/nonverbal/facial expressions, tones/voices, formal/informal languages, translanguaging (emojis, visual semiotics). Interlocutors are language users who are involved in interactions (who communicate with who?). Topics are related to activities which include grammar teaching, EMI policy, food, emotions, disciplines, etc.
- **Sequences**: routines, rituals and episodes of events/activities (Ciesielska et al., 2018), for example, the frequency of non-official language(s) used in classroom teaching, group-work activities, bedtime book reading at home, or the number of hours allowed for TV watching and internet use per day, or the rituals of a typical culture-related celebration such as Christmas, Chinese New Year and Ramadan
- **Time**: observations require long-term engagement to record the processes of language-related activities and events. Typically, researchers choose some observation periods strategically (focus on highly concentrated activities), or select regular observations cut across a longer period of time (e.g., once a week for a semester, twice a month over a year).
Types of observation

As a useful research means for gathering rich and in-depth data, observations can be identified on a continuum from highly structured to unstructured (Cohen et al., 2011; Mackey & Gass, 2005; Patton, 2015) as follows:

- Highly structured observation
- Semi-structured observation
- Unstructured observation

Before I move on to give examples of each type of observation, it is important to classify the role of researchers in observation as their presence and involvement can affect the types of data and at times the quality of data. In general, the role of researcher can be categorized as the following (Cohen et al., 2011; Hammersley & Atkinson, 2007):

- The researcher as complete participant who immerses in the research context and becomes a member of the community. While the researcher may obtain insider knowledge by identifying herself/himself with the political, religious or cultural view of the researched community, s/he may also, as a result, lose the objective analytical ability.
- The participant observer (partial participant). In this role, the researcher may or may not be a member of the researched community who gains ‘insider knowledge’ through a long-term involvement in the community life. Although clearly seen as a researcher by the community, the role as participant-observer allows access to deeper information with little obtrusiveness.
- The researcher as non-participant observer has little involvement in any form of interaction and activities in the research community. As an outside observer, the researcher is not covert, but mostly unnoticed by the community. Examples may be observing a lecture together with a large group of students or observing a space where people practice debating skills in a foreign/second language.

Although researchers may choose to take on different roles in their research field, the majority adopt the role of observer-as-participant. Depending on the purpose of research and the roles of the researcher, different structures can be used to gather the data required. In the following, I provide a discussion of two types of frequently used observation in the field of applied linguistics: structured observation and participant observation.

Structured observation involves using a predetermined observation scheme to collect data confirming or refuting the hypotheses of a research project. It has been widely used in second language classrooms. Researchers use the method to gather “in-depth information about such phenomena as activities, interactions, instruction, events and the types of language that occur in second and foreign language classrooms” (Mackey & Gass, 2005, p. 186). The observation scheme is usually based on a number of categories or elements, of which the frequencies, patterns and presences can be noted or calculated to facilitate the comparisons between settings. In the 1980s and 1990s, the Target Language Observation Scheme (TALOS; Ullman & Geva, 1985) and the Communicative Orientation of Language Teaching (COLT; e.g., Spada & Frohlich, 1995; Lightbown & Spada, 1990; Lyster & Ranta, 1997) were adopted either in original or modified forms to record classroom activities, participant organization, topics, interactions and pedagogical contents in a wider range of classrooms.
In a study of curriculum reform in Singapore (Curdt-Christiansen & Silver, 2013) a colleague and I looked at a particular curriculum policy in English literacy, Strategies for English Language Learning and Reading (STELLAR), and how it was implemented in lower primary schools. We used an online observation scheme together with video recordings to explore which aspects of policy reform have taken hold and which teaching practices persist despite top-down efforts to change them. Involving 20 classrooms across ten schools, we developed the scheme based on three overarching categories of classroom observation: material adoption, classroom physical arrangement and participation patterns.

When developing the online (instant in-class) coding scheme, we first took into consideration the research goals and used a ‘match-mismatch’ perspective to evaluate what had been implemented and to identify factors that could explain if or why a planned curriculum had not been implemented. The observations were compared with STELLAR guidelines and lesson plans to determine the extent to which teachers employed new approaches, followed lesson plans, implemented suggested activities and used recommended resources.

We next reviewed studies of classroom interaction (Nystrand & Gamoran, 1991), social environment of learning (Burnett, 2002) and classroom participation (Reder et al., 2003), from which we developed a coding scheme to map participation structures, details of the learning environment and interactional opportunities offered for extended language use and language-rich classroom experiences (Silver, Pak, & Kogut, 2010).

Following that, we conducted several training sessions for all researchers and research assistants (RAs) involved in the project. Since the coding was done online and required instant coding from a laptop, researchers and RAs needed to be very familiar with the Microsoft Excel spreadsheet, in which they moved from one activity to the next. Figure 28.1 shows the online coding scheme.

As shown in Figure 28.1, the coding scheme is divided into two parts. The first part consists of seven categories, including framing, participation pattern, student engagement, classroom management, environmental warmth, teacher style and promotes learning. Of these categories, white (non-coloured) cells were required to be filled online (in class) as the lessons proceeded, whereas coding of shaded cells could be done later based on video recordings.

The second part consists of an activity coding scheme, which also includes seven categories: activity type, skill focus, artefacts/tools, documentation, teacher assessment of student learning, knowledge classification, depth knowledge and knowledge manipulation. It should be noted that when the teacher moved from one activity to the next, the RAs would open another sheet (indicated as PP2, PP3, etc.) to record what they observed in the categories.

In addition to the discrete categorical coding system, a video camera and two audio recorders (one for the teacher, one for the children) were also used to capture classroom activities as well as teacher talk and children’s interactions during group work. These recorded observations allowed researchers to confirm and complete the final coding. Then the completed coding sheet from each visit to a classroom was saved in the university’s database for the project with clear indication of the source and time of data collection. Finally, the data were posted on the research team’s Microsoft SharePoint drive.

While the structured observations did indeed provide the researchers with a large amount of rich data, they did not provide them with opportunities to learn about the children and their teachers, nor did they offer them a chance to interact with the participants on a deeper level. Although the project generated interview data and one of the RAs had taken field notes, there was insufficient time for immersion in the schools and taking on the observer-as-participant role. As a result, the information gained from the schools and teachers remained largely ‘outsider knowledge’.
<table>
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<th>Activity 1</th>
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<td>Type</td>
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<td>Theme/Topic</td>
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<td>Mathematics Sub-Skills</td>
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<td>Artefacts/Tools</td>
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<td>Other</td>
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<tr>
<td>Enjoyment</td>
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<td>Student's Tool:</td>
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<td>Student's Produced work:</td>
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<td>uses non-punitive strategies</td>
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<td>4</td>
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<td>Process/Product</td>
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<td>Quality</td>
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<td>Stated Teacher Rationale for activity:</td>
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<td>encourages collaboration</td>
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<td>tolerates errors</td>
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<td>promotes creative thinking</td>
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<td>promotes problem solving</td>
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<td>On-going assessment</td>
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Figure 28.1  The online coding scheme
Participant observation

In contrast to structured observations, participant observations are much more open-ended in nature, and research questions tend to emerge as the investigation goes along rather than being predetermined hypotheses (Jorgensen, 2015; Heath & Street, 2008). ‘Participating’ in the context of applied linguistics indicates active involvement in people’s social life around languages. When participating, researchers acquire direct access not only to different domains of language use but also to the participants’ experiences, thoughts and relationships related to language use in these domains. While participant observation can yield powerful and informative data through ‘thick descriptions’, there are four critical issues that need to be addressed, outlined next (Atkinson, 2015; Boccagni & Schrooten, 2018; Lincoln & Guba, 2000).

**Sketching the field.** Before entering the field, it is necessary for the researcher to review relevant literature related to the topic of the project. While the researcher should have an open mind and a flexible stance, s/he should not have an empty mind. Pre-existing research can provide references that facilitate the ‘logic of discovery’ by delimiting the field. Unlike using preconceived hypotheses, sketching the field with “sensitising concepts” (Boccagni & Schrooten, 2018, p. 213) can help researchers to narrow down and select the research field rather than to be lost in the wider setting.

**Gaining access to the field.** Obtaining permission to access a suitable research context can be rather complex depending on the gatekeepers’ attitudes towards the project and the impact on the well-being of the participants. It also depends on how well the participants receive the researcher. Often, the researchers need to negotiate access to the site with regard to when, where and what to observe. Even with permission to observe, the initial period should not be used for collecting data but for getting to know the setting and the participants (Taylor, Bogdan, & DeVault, 2016). Gaining entry, however, may become easier if the researcher is a member of the researched community and has some insider knowledge of the community. Florence Bonacina-Pugh (2012), for example, discussed issues of access to multilingual schools in France. As a member of the school staff with knowledge of multiple languages, she negotiated access to study ‘practiced language policy’ in classrooms for newly arrived migrant children. Yingying Mu (2018), an ethnic Miao from the south-west of China, studied a multilingual village in a remote mountain area. Her knowledge of the local languages and her family connections with the village leader made it possible for the villagers to welcome her to live with them and ask questions about their language ideologies.

**Establishing trust and rapport.** Not all insider members can gain deeper knowledge about the participants. In my study (Curdt-Christiansen, 2006, 2009) of a Chinese community in Montreal, I observed how a group of Chinese immigrant children developed literacy skills in Chinese, English and French in their homes and heritage language school. Although I was a member of the Chinese community and had easy access to the community and the heritage language school, in the beginning of the project I did not gather in-depth information from the homes and in class. In my reflection, I wrote:

Although I was well received in their homes, I felt I was an intruder disturbing their routines, spending whole afternoons watching and interviewing the children and their parents. Sometimes, as a courtesy, they invited me for supper. As time passed, I felt more and more uneasy going to their homes. This may in part be attributed to my upbringing, in which ‘only taking’ without ‘giving’ is considered unethical. Thus, I decided to shed my ‘researcher’ mask and become an ‘ordinary’ parent just like the other parents, participating in discussions about issues of ‘our children’. Gradually, the ‘children topics’ extended
to more intellectual investment and emotionally sensitive topics such as divorce matters and family crises. My role as a ‘researcher-listener’ evolved to that of a ‘participant’. Thus, the home visits began to shift location between their places and mine. The interview sites moved from homes and school to movie cinemas and picnics. The interviews themselves became ordinary frequent telephone conversations, which were less formal, more intimate and free flowing.

It was through an extended period of contact with the families, sharing experiences and information, that I gained trust from the parents who allowed me to enter their homes and observe the literacy practices of their children. Jorgensen (2015, p. 10) rightly points out:

Collecting truthful information requires considerable skill in cultivating rapport, making friends, and sustaining trusting relationships with people in the field. Simply put, people who do not know you or trust you are not likely to be cooperative in providing much data, especially truthful information about the deepest meanings and inner workings of their daily lives.

As such, when establishing rapport, researchers need to pay particular attention to the following aspects:

- Communicating a feeling of empathy for participants
- Sharing their own true experiences to gain the participants’ trust and interest
- Establishing common interests through socialising
- Making themselves available for friendship and help
- Sharing in participants’ symbolic world, culture and perspective
- Learning to speak the participants’ language of a particular community
- Be humble, but not passive, indifferent and dispassionate
- Conducting informal conversations rather than formal interviews

Triangulating with other methods of data collection

Participant observation is often used together with other methods of data collection. Triangulation is typically considered a way of identifying ‘blind spots’ and gathering insights from other sources of data collected through different methods.

Formal or informal interviews. Throughout the process of investigation, observations are paired with interviews. These interviews can be formal and informal (see Rolland, Dewaele & Costa, this volume). Formally, the researcher can devise a set of structured questions through which in-depth information and life histories can be collected. The formal interviews can be conducted at the individual level as well as the group level (or focus group discussion, see Galloway, this volume).

Very often, during the course of a research journey, researchers would ask a lot of questions, of which many are informal and casual. These informal conversations can take place at dinner tables, during a lesson break and in a café, through means of telephone, email, video-conferencing or any number of current apps (elaborated next). Åsa Palvianinen (2019), for example, uses social media as her research tool to collect interview data from her participants in Finland to understand what roles social media play in family communications.

Collecting artefacts and documents. It is important to note that a holistic view of a research community cannot be achieved without collecting relevant artefacts, documents and other forms of human communications. Taking the earlier structured observation (Curdt-Christiansen &
Silver, 2013) as an example, in addition to the coding scheme and video/audio-recorded classroom teaching, we also collected children’s work in classroom, textbooks and teaching resources used, photos of classroom environments as well as policy documents as sources of data to understand the process of policy implementation.

Gathering verbal/non-verbal interactions through digital devices. Traditionally, researchers rely heavily on field notes to record interactions and interviews. With the development of new technology, digital devices have become irreplaceable tools to capture detailed and authentic data. Some modern devices such as mobile phones and tablets are easy to set up and use without being intrusive. They can be convenient and handy when unexpected critical moments arise and where field notes are insufficient to capture all details of the incident. But ethical issues should be considered with caution (see De Costa et al., this volume). If participants are not informed of the purpose and content of the research, these devices should not be used.

Conducting team research. Team research involves two or more field-researchers studying the same or a similar research site (Taylor et al., 2016). Using basic participant observation techniques, the team members can bring their own research perspectives into the field of study and employ different strategies and tactics when approaching a research topic. The different approaches to recording and observing the same research setting can provide the team with a deeper understanding of the research issue and a broader picture of the research setting. Zhu Hua and Li Wei (2018, unpublished) have used the method to observe a community event in a family language policy (FLP) project involving five researchers. In order to understand what role the ethnic community plays in relation to FLP, the researchers observed a Polish photography exhibition. While there were similar observational points made by all five researchers, there were also differences between them in terms of their focus on who came to the exhibition, what ideologies were behind the exhibition, and what languages were used by people. In short, team observations bring together people from different backgrounds with different social and research perspectives. Such differences can enrich research activities with thick descriptive data from all angles. In the next section, techniques and issues of what and how to record by means of field notes are discussed.

Field notes

When researchers are immersed in a research site over an extended period, they are able to connect the dots of scattered events and incidents to make a holistic view of the researched site, community or individuals. The art of taking field notes or recording how languages are used and how they evolve and function to serve the relevant purposes of people’s lives is not easy and straightforward. When discussing field notes, two major issues need to be addressed: how to take field notes and how to keep the field notes.

Taking field notes. Participant observation is not an observation without field notes. To catch the dynamics of a research situation, people’s relationships with each other, life ways and the role of language, researchers need to generate ‘thick descriptions’ to document the ways of speaking, writing, conversing, acting and believing (Heath & Street, 2008). Observations depend highly on the recordings of complete and detailed field notes. Spradley (1980, p. 78) recommends a checklist of the content of field notes:

- Space: the physical setting
- Actors: the people in the situation
- Activities: the sets of related acts that are taking place
- Objects: the artefacts and physical things that are there
• Acts: the specific actions that participants are doing
• Events: the sets of activities that are taking place
• Time: the sequence of acts, activities and events
• Goals: what people are trying to achieve
• Feelings: what people feel and how they express this.

While the checklist is comprehensive, one of the important elements of field notes is missing from the list, namely reflection. As social-science researchers, applied linguists raise questions and react to situations when they do not share the culture of the participants or have a perspective different from that of their participants. Therefore, the checklist should also include reflections that record “the researcher’s feelings, interpretations, hunches, preconceptions, and future areas of inquiry” (Taylor et al., 2016, p. 85). These personal reflections, projections and reminders should be recorded separately from the field notes. Some researchers arrange their field-note pages in several columns, writing logistics in one, field notes in another and reflective memos in a third.

Heath and Street (2008, p. 77) suggest that the component of field notes for language researchers should include at least the following three elements:

1. Running account of events in real time
2. Notable short phrases uttered by interlocutors so that audio or video recordings can more easily be coordinated with field notes
3. Changes in audience, routines, rituals and features of context that co-occur with shifts in language and modes

In my own field studies, I tend to arrange my field notes into three columns: observation notes, methodology notes and reflection notes. Observation notes include my detailed and concrete observations of what I saw, heard and tasted. Methodology notes included my schedule of site visits and interview notes, including to whom I was going to talk and what questions I was going to ask. Reflection notes included what Richardson (2000) refers to as theoretical notes and personal notes. They were my personal reflections of what I thought about certain issues in my research, my speculations over what my participants’ intentions could be, and possible explanations of a particular behaviour in terms of a theory that I could apply. Table 28.1 is an example of my field notes from a project on immigrant children’s literacy practices (unpublished).

There is no doubt that researchers develop their own different ways to record their observations, be that jotting down key words and symbols, logs and diaries, or notes and maps. Field notes, as the most essential element in observations, should be treated meticulously and comprehensively.

**Keeping field notes**

Many experienced observers have noted that typing up field notes requires a tremendous amount of time and self-discipline. Although they believe that key words, maps, sketches and even short-interactions have been recorded, the initial level of description need to be written down as soon as they return from the field. A few useful and common guidelines are recommended by scholars and experienced field researchers (Hammersley & Atkinson, 2007; Heath & Street, 2008; Taylor et al., 2016).

1. Field notes should be typed up immediately upon returning from the field. Typing up the initial fragmentary notes serves the purpose of reconstructing the field experience.
Table 28.1 25 August 2000, Visit to Yida’s House

5:30 p.m.:
Came late, supposed to be at Yida’s at 4:30 p.m. While I am parking the car, Yida and her little sister, Linlin, are returning from the library. In Yida’s hand is an English book, *Little Women*. They greet us in Chinese. It’s my first time to visit them in their new house located in the West Island. We enter the house. Very new. Danlu (mother) is making ‘baozi’ (Chinese buns). Yida shows us around. There are three bedrooms upstairs. It seems that all the furniture is new (got confirmed later). Kids jump on the bunk bed in the children’s bedroom. I go downstairs to talk to Danlu. This part of the house has not been furnished much; the old dining table I saw in their apartment before has been moved in here. The living room (connected to dining room in open concept) is furnished only with a love seat sofa. All walls are painted yellow which gives a fresh flavour of spring. Danlu likes the new house very much. We chit-chat about the quality and price of the house.

6:00 p.m.
Went downstairs to the basement where the kids are watching TV. Quite a big basement with two sections. One is for TV and another for computer and books. Bookshelves are divided into three sections (drawing). Talk with Yida about her new school. She likes it but has not made too many friends yet. I ask her what books she has read recently; ‘detectives’ and ‘mysterious’ she answers. She is still busy with her violin. “Professor Li (her violin teacher) says that I need to practice more in order to outperform in competition”. She tells me that she is lazy from time to time and has to hide herself in the bathroom to read books instead of practising. Schoolwork is easy for her. She doesn’t need to use much time on her homework. For Chinese language mom and dad have a strict rule: practise five characters every day.

6:30 p.m.
A friend of Yida’s from her previous French school (LUNE) comes together with Yida’s father, Dr Pan. They miss each other so much, hug, hug and hug. They greet each other in French, then go immediately upstairs to talk. I meet a friend of Danlu’s from China (came in with Dr Pan). We chat about how to maintain children’s Chinese. Danlu’s friend suggests we should delay the children’s contact with the outside world. Yida always acts like a little grownup. Where did she learn to have a sense of adult responsibility?

7:00 p.m.
Dinner is ready. Grownups are at the dinner table. Children sit together around the coffee table. Yida takes care of the children, helping Linlin and other children to get food and drink. All conversation is in Chinese among the kids. However, when Yida talks to Baijie, it is in English; with her friend from LUNE, in French.
Memories can deceive us if we do not expand the notes that are made quickly during the fieldwork. It also serves as a reflective practice because while typing up the notes, questions, emotions, reflections and insight would emerge which can be helpful when going back to the field to collect more data.

2 Field notes should be tagged, labelled and entered into the computer and saved in at least two different databases.

3 Field notes should be grouped into different files on a weekly or monthly basis depending on how often fieldwork is conducted. A short summary or conceptual memo (Heath & Street, 2008) should be written about the generic ideas that emerged from the weekly observations and queries raised from reflections.

4 Log digital recordings. The log or filename should include time, place, key speakers, field notes and the primary artefacts. An example of this is shown here:


It goes without saying that observations are powerful tools for gaining insight into people’s everyday life in different situations involving languages. The methods can provide researchers with the most detailed and comprehensive data to understand the process of language learning/teaching, language change and language use in any social context. The different forms of observation allow researchers to have not only direct access to observable settings and events, but also ‘lived through’ experiences with everyday mundane routines and activities.

Like all other research methods, observation also has caveats and disadvantages. Regarding structured observations, it can take a long time to develop a coding scheme even though it can be adapted from existing studies. It also takes time to practice the coding. The most serious concern, perhaps, is the intrusiveness during the observation. Although the researchers’ goal is to collect data as unobtrusively as possible, their presence can affect participants’ behaviour to an extent. Furthermore, observations allow researchers to see activities undertaken by participants, but not the motivation for their actions. These limitations can be resolved by combining observations with other data collection methods such as interviews, stimulated recall and participant observation.

Regarding participant observation, it is costly both in time and effort. Gaining access and building relationship with participants is time consuming. Although researchers can gain rich data from the field, their observations tend to be selective and subjective. This is because the researchers/observers decide where to look, what to look at, when to look, how to look and whom to look at. In this respect, observations are determined by personal experiences and interest. Despite these limitations and caveats, observations are useful research methods. When used together with other tools of inquiry, they can yield powerful and meaningful data.

References


Observations and field notes


