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Analyzing Field Sites

Learning Objectives

After reading and reviewing this chapter, researchers should be able to

1. Describe methods of conducting and documenting observations of social life in natural settings,
2. Demonstrate familiarity with participant observation of social life, and
3. Explain the analytic processes involved with field notes.

Introduction

One of the best ways to analyze life is to witness and experience it in all its rich detail. **Participant observation** is the researcher's method for watching and listening to people act, react, and interact in natural social settings, most often during everyday matters but sometimes during special circumstances. As humans go about their lives, researchers analyze people's movements, conversations, and environments to discern what, how, in what ways, and/or why they do the things they do. Researchers document their routines, rituals, and rules for reference and analysis, along with interpretations of their roles and relationships with one another.

Systematic participant observation has its roots in anthropology when different world and national cultures were studied in the early 20th century and documented in writing and sometimes photography and film (Brinkmann, Jacobsen, & Kristiansen, 2014). The goal of these studies was to present just enough rich data to give readers a sense that they were there at the sites themselves. The traditions of those early

methods have evolved, but the basic goal remains the same: to observe and analyze humans as they live their lives in a variety of social settings.

Participant observation is not necessary for every qualitative study. In fact, most qualitative research with adults uses interviews to obtain participant perspectives (Roulston, deMarrais, & Lewis, 2003, p. 646). It can be wise, however, to observe people first at a specific site where they work or gather who may be interviewed later. It can stimulate specific questions for the interview (discussed in Chapters 4 and 5) and better inform the researcher about the participant's five Rs and cultural milieu. Also, studies whose topics or research questions focus specifically on the dynamics of human interaction, or settings where interviewing is not possible with those observed, lend themselves to this data collection method.

Participant observation can be conducted in conjunction with interviews and other data collection procedures to enhance the total database or **data corpus**, also referred to as an **archive**. Sometimes what participants offer during interviews contradicts what they say and do in natural contexts. This leads researchers to more carefully analyze and reconcile the discrepancies. Participant observation can also stimulate topics or specific questions for continued fieldwork at a later time.

Two new terms require brief explanation here: method and methodology. A **method** is how you go about doing something. A **methodology** is why you're going about it in a particular way. The "how to" ways of participant observation are described below and include techniques such as writing field notes and recording audio and/or video of natural life. The "why" of participant observation is to provide the researcher a real-time, uncensored view of the social world to more credibly analyze how humans go about their lives. Consent processes for and the ethics of conducting participant observation will be discussed in Chapter 8. In this chapter, we focus on method.

On Culture

Culture and its related terms—subculture, microculture, counterculture, and so on—are a bit slippery to explain. Even anthropologists have no consensus; hundreds of definitions for the core term exist, and the culture concept today is perceived as unstable, random, and unpredictable. Many descriptions, however, include knowledge as a key component of what culture is: "*knowledge that is learned and shared and that people use to generate behavior and interpret experience. . . . It is social knowledge, not knowledge unique to an individual*" (McCurdy, Spradley, & Shandy, 2005, pp. 5–6; emphasis in original).

Culture is not a static "thing" that can be observed directly. Rather, it is an ever-evolving process, system, abstraction, concept, and even performance. Culture is constructed and interpreted by researchers through observing groups of people's particular actions, language, social practices, and routines (i.e., their norms and traditions), tacit or hidden rules for conduct, and rituals and ceremonies that produce and reproduce what the group "is" during a particular span of time (Chirkov, 2016;

Duhigg, 2016; Gobo & Molle, 2017). We characterize culture broadly as the participants' site-specific ways of working and living with others:

As individuals we have multiple affiliations, whether voluntary or not, with different groups of people. Our types of belonging shape and are shaped by our social interactions with [others]. Researchers observe the particular forms of acting, reacting, and interacting that happen in particular settings in order to document in what ways these occur. The composite combination of unique interactions and the values, attitudes, and beliefs embedded within them help us identify and formulate what is “cultural” about the specific site and its members. (Saldaña, 2015, p. 101)

To clarify the sometimes hazy difference between society and culture, the latter is part of the former. Charon (2013) defines a **society** as “a social organization of people who share a history, a culture, a structure, a set of social institutions, usually a language, and an identity” (p. 340). The people within a society assume or perform its cultures.

One of the ways a fieldworker describes a culture is through what anthropologist Clifford Geertz (1973) promoted as **thick description**, an approach that does not imply lengthy narratives but a written interpretation of the nuances, complexity, and significance of a people's actions. By focusing on selected but rich details of what researchers experientially witness, they can reflect on and hopefully render an account that provides insightful knowledge for readers about a social group's interrelationship dynamics. C. J. Pascoe's (2007) ethnography, *Dude, You're a Fag: Masculinity and Sexuality in High School*, explores not just male homophobia but also the spectrum and interplay of heterosexuality, homosexuality, gender, race, bodies, sex, identity, and their interwoven ritual performance and reproduction in high school culture.

Researching a people's five Rs offers a template for documenting unique aspects of their ways of life, and participant observation is a most suitable method for conducting **ethnography**, the study of a culture. Ethnography is not the sole focus of this book, but the fieldwork components described below offer guidance for research in that genre, discussed further in Chapter 6. In this chapter, classroom culture is profiled through examples.

Observation Settings

Participant observation happens somewhere, and it is the “where” (and people populating that “where”) that provides optimal opportunities to gather data to inform a research study. If one's topic is teaching and learning, a classroom is an ideal site. Health care studies might observe patients in hospitals, clinics, or in their homes. For studies of immigration issues between the United States and Mexico, observations of border patrol agents working in California, Arizona, New Mexico, and/or Texas might be in order. Recent studies in qualitative inquiry have even explored the

technological worlds of online gaming and social media as digital cultures. Perhaps the site itself intrigues you and motivates an extended study, as the street vendors on New York City sidewalks did for sociologist Mitchell Duneier (1999). A setting of natural social action, reaction, and interaction provides detailed moments for observation and analysis.

Finding a place and space

Sometimes the physical setting itself is important, and other times it's the specific people who just happen to be living or working in a particular setting that determines where researchers go. Regardless, researchers first look for and scout out possible locations for fieldwork. **Fieldwork** is the research act of observing social life in a specific setting and recording it in some way for analytic reference. Being a fieldworker, or “in the field,” is a researcher's placement and immersion among particular people in a particular environment for close examination.

Public places such as shopping malls and restaurants contain large collections of people, but these people are clustered in small groups without a single focus of attention for everyone. These open-ended settings require researchers to continually scan and mingle among the crowd to observe the varying pools and flows of social action. Ambient noise and multiple simultaneous conversations can also make listening difficult.

Large gatherings like concerts and sporting events, or smaller settings like offices, however, are close-ended with a central and more purposeful focus for attention by the participants and are thus generally easier to observe and document. However, some close-ended settings like small elementary school classrooms can have a myriad number of activities to document. Fewer people does not always make participant observation easier, but the collective or majority reactions to a central point of action are easier to take in.

Madden (2017) wisely notes that “the field” is most often not a single bounded location but a multisite network that is “part geographical, part social, and part mental construct” (p. 52). Most people interact in a number of different settings. For example, children's social worlds usually include their homes, school busses, several classrooms, lunchrooms, playgrounds, stores, streets, friends' houses, parks, perhaps extracurricular activities in commercial gyms or soccer fields, and so on. Some children may interact with others through mobile devices and apps such as FaceTime and Snapchat, or virtually with peers through online video gaming. One female researcher observed and interviewed a female adolescent as a case study at the student's school, a community center where she took classes, and in the teenager's bedroom, which gave the researcher a unique opportunity to look at the furnishings, decor, and mementos the student collected.

Access

This brings up the topic of **access** for participant observation—a researcher's ability and permission to observe at a particular site. A female researcher in a teenage girl's bedroom was possible because she received permission from the girl's mother.

But a male researcher might not have received such access. Access comes from **gatekeepers**—people with the authority to grant permission and facilitate the researcher's entry into particular field settings. Adult gatekeepers at schools might include principals, teachers, and parents. Even children themselves might function as gatekeepers if the leaders of cliques approve and support (or do not) a fieldworker's presence among their circle of friends. Gatekeepers can sometimes be key participants themselves because they can either consent to or reject the researcher's presence in their lives. Publicly accessible spaces such as coffee shops do not have gatekeepers, but they do have rules: anyone who enters must display proper dress and decorum and, more often than not, must patronize the business by purchasing something.

At field settings requiring gatekeeper review, researchers should meet with those individuals and explain the purpose of their study. They should present themselves professionally yet humbly as people who value the opportunity to learn from an experience and to benefit others who could be interested in their research topic. They must negotiate any understandings, ways of working, and restrictions (e.g., no review of filed paper documents, no intrusive distractions to participants during work). Students observing for a research methods class project should openly admit that and offer that the field experience is part of their educational development since their primary goal is to learn about, from, and with others. Some settings require that fieldworkers maintain some sort of credential like a fingerprint/security clearance card or successful completion of a volunteer training program before they work with particular groups. Written and signed letters of agreement explaining the project guarantee fewer misunderstandings and miscommunications between the researcher and the site's primary gatekeepers.

The Observer's Frames

Participant observers bring who they are into the field site. And they must adopt various roles, positions, standpoints, and perspectives as they watch others conduct their lives. This section explores some of the frames or stances of the observer in relation to the participants and the purpose of the study.

Lenses, filters, and angles for fieldwork

Participant observation databases consist primarily of both narrative and visual materials, but what does one specifically look for or at? Researchers are like cameras and their eyes like **lenses**. The way researchers perceive social life can be influenced and affected by their own significant demographic attributes such as gender, age, race/ethnicity, sexual orientation, socioeconomic class, and/or occupation. Lenses might also consist of the particular research methodology or disciplinary approach employed for a study (educational, sociological, psychological, etc.).

Cameras also have **filters** covering their lenses that let certain wavelengths in and keep others out. The filters that cover a researcher's lens might consist of a set of personal values, attitudes, and beliefs about the world, formed by her unique personal

biography, learned experiences, and individual thinking patterns. Researchers' identities as human beings will influence and affect what they observe in the field site since we tend to interpret others' experiences based on our own. Filters also consist of particular theoretical perspectives or **standpoints** within a discipline—for example, feminist, critical, emancipatory. Some educators, for example, might place more emphasis on schooling as guided by sets of national standards, while others prefer more student-centered and individualized instructional designs. Researchers' filters can literally prevent them from seeing/noticing elements in field sites, so it is important for researchers to be aware of their own filters.

Cameras are also placed at particular **angles**, suggesting not just panoramic and close-up views but also a researcher's relational **positionality** as a peripheral, active, complete, and/or covert member, in addition to her interpretations of social action she sees and hears at the **micro-level** (local and particular), **meso-level** (cultural, national, or mid-range), and/or **macro-level** (global, universal, or conceptual) of life. Researchers zoom in and out throughout the course of observations to get varied perspectives of the social scene, varying from insider to outsider, from intimate to distant, or from emotionally invested to neutrally detached.

The lenses, filters, and angles of researchers' personal worldviews work in conjunction with their research topics and questions to help guide and focus fieldwork observations (see Figure 2.1). A female researcher and a male researcher may observe and interpret a women's support group differently. A gay man and a heterosexual fundamentalist Christian man might observe a gay pride festival in very different ways. An older Hispanic and a young African American may interpret U.S. immigration issues differently, and so on. This is not to suggest that researchers with particular demographic backgrounds are more competent or better qualified to observe the nuances of social action among similar people; on the contrary, sometimes an outsider to a social group can perceive things that an insider takes for granted. Researchers should, however, always consciously reflect on how their standpoint and positionality influence and affect what is interpreted through their lenses, filters, and angles.

Subjectivity, the researcher's personal and unfettered perspective, is unavoidable in qualitative research. It is a human dimension that is both an advantage and liability to fieldworkers. Subjectivity permits researchers to respond to data in ways that generate emotion-laden and meaningful interpretations about the social world. If research consists solely of subjective opinions, however, such as first

FIGURE 2.1 ● A fieldworker's positionality has a lens, filter, and angle, comparable to a camera.



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impressions, gut feelings, and personal biases, the work loses credibility with audiences. A respectful balance between facts and feelings is necessary to ensure a trustworthy account of the investigation. An honest disclosure of the researcher's lenses, filters, and angles, in addition to some of the methods we describe below for field note analysis, better guarantee a more substantive report.

Observer membership roles

Adler and Adler (1987) identify three researcher positions or membership roles for participant observation: peripheral, active, and complete; roles may also be covert. When in a **peripheral role**, the researcher maintains a fly-on-the-wall stance, literally off to the side of what he or she sees and hears, not participating directly in any activities observed. The researcher witnesses and documents social life as it occurs. Some methodologists refer to this role as naturalistic observation rather than participant observation. This role serves best when it is important to focus attention exclusively on interaction as it happens, or when one must maintain an unobtrusive presence.

When in an **active role**, the researcher takes a stance midway between peripheral and complete roles. The researcher in an active role occasionally participates in the action of the field setting. This provides firsthand experience in what participants are doing, such as office work in a corporate setting. The participation is not full-time but instead is part-time to permit other necessary researcher tasks such as document review or peripheral observation.

When in a **complete role**, the researcher is a co-participant personally immersed in the social world studied. He or she lives the same experiences as those observed for a lengthy duration. An example might be an educator who both teaches her class and observes the children at work for a research study on learning. Another example is Barbara Ehrenreich's (2001) riveting account of her stories as a minimum wage earner in *Nickel and Dime: On (Not) Getting By in America*. Ehrenreich took on such complete roles as a restaurant server, housecleaner, and big box store clerk to learn firsthand about the types of work people in these positions do and their meager wages for living.

Ehrenreich also assumed a **covert role** for her fieldwork—that is, she did not inform all the people she worked for that she was documenting her (and their) experiences for research and investigative journalism purposes. Such disclosure might have restricted her access to the sites and prevented her from learning the behind-the-scenes intricacies of minimum wage work. Most compelling, her complete participation in the tasks of server, housecleaner, and store clerk with their degradation and unlivable salaries provided her irrefutable details about the conditions of low-wage workers.

Covert participant observation has been conducted in studies about mundane factory work, university dorm life, sexual activity in men's restrooms, drug abusers, and biker gangs. A covert position provides access to hidden facets of social life such as illegal activities. It is a strategic choice when the phenomenon of interest cannot be studied as in depth as it can through other methods such as interviews. This can sometimes have embarrassing and even dangerous consequences for the researcher if participants discover they were being observed by an outsider. If a researcher's study

is subject to institutional review by a university, for example, her oversight committee might not permit covert research due to ethical issues and liability concerns.

A researcher's role as a peripheral, active, complete, and/or covert member during fieldwork should be the one that offers the best angle or perspective on social life and gives her the best insight into the phenomenon studied. See Pink et al. (2016) for newer digital ethnographer roles such as *remote* and *virtual* (p. 134).

Purpose-driven observations

Researchers also use the purposes of their studies and their accompanying research questions as frames for what gets painted in the life picture. If the goal of one's research is to study customer-clerk communication in retail stores, her observations focus primarily on these two roles as they converse, not necessarily on customers shopping on their own as they walk through store aisles. But listening to conversations among clerks themselves in the store's private break room might also provide insightful awareness on what people in these roles say out of customers' earshot. Also, the interactions between sales clerks and customers will vary greatly from dollar stores to high-end department store chains. A single question can lead researchers to multiple but comparable sites to compare participant actions, and this generates a more substantial database for analysis.

One's research question might suggest that the lens of observation focus on a particular person as a case study, such as a teacher. Limiting observations to her classroom is certainly a viable choice, but to get a broader perspective of a teacher one would need to observe her interactions with colleagues in a variety of sites such as a faculty lounge, with her principal at an area faculty meeting in the school library, with her children's parents in the school office, with her students on a field trip, and even—with permission—with her family in her home after school hours, as Tracy Kidder (1989) did during a year-length study of a fifth-grade teacher. As with multiple sites about the same research topic, researchers should observe a case or the same group of people in multiple social settings for a more three-dimensional rendering of the participants' lives.

The first days of fieldwork can be overwhelming. Even with a specific research agenda, the dizzying array of social life happening can be too much for researchers to take in. Fortunately, it does get easier with time. New researchers find their bearings and settle in after a few days and have a clearer sense of purpose for observations.

Field Notes

Memory is a sometimes unreliable substitute for credible, tangible evidence. Social life is filled with such meticulous detail that no one can keep all that happened recorded accurately in his mind. Observations are best documented in some way through writing and/or visual methods for recall and analytic reference. Field notes accomplish these goals; as some researchers staunchly attest, "If it's not in the field notes, it didn't happen." There is no standardized way to take field notes, but we offer methods that have worked best for us.

Written documentation of analytic observations

Field notes are most often for the researcher's eyes only, a private database of observation experiences. Thus, they can range from sketchy, handwritten journal entries to detailed narratives typed on a laptop. What a researcher chooses to share from them through publication or presentation is her choice. We offer though that the better written one's field notes are, the better their data will be for reflection and analysis.

Some researchers prefer to handwrite their initial, real-time observations, then transfer and elaborate on them with a desktop computer. Others prefer to type observations directly into a program on a laptop as they watch and listen as a step-saving method. Depending on a fieldworker's setting, she might not have access to electric power or battery life when needed, and the sound of laptop typing/clicking could distract participants at the site. Also, her particular site or membership role might not permit her to take field notes as she is participating in the social action of interest. Thus, she documents her observations and experiences later, preferably as soon as possible while the memories are fairly fresh in her mind. Regardless of how or when one takes field notes, there are some specific ways we offer to write them.

Front matter

Document the day and date, specific location of the observations, and start and end time of fieldwork at the beginning of each day's or section's notes. Though it will come after the observations and analytic reflections have been conducted, caption or headline the specific field note set with a descriptive or evocative title: "First Day Observations," "Having a Bad Hair Day," "A Glimmer of Hope," or "What Was He Thinking?" Most often helpful to also note are any necessary participant demographics such as the number of males and females, ethnic ratios, age ranges, and so on if those data might be pertinent to the research agenda or analysis. A field note heading might look like this:

January 21, 2020 (Tuesday)—"Group Murals"

Escobar School, Art Classroom/Studio, 9:00–9:40 a.m.

Period 2 Art Class (Carol and 22 third-grade children—13 girls, 9 boys, all Hispanic [2 boys absent today for testing])

The setting

The first time observations occur in a particular setting, narratively describe and, if equipment is available and permission is granted by gatekeepers, photograph the site for analytic reference and embed the photo in field notes. Descriptions of the setting needn't be so detailed that the photograph becomes irrelevant. Highlight general points, such as amount of space, organization, maintenance, and key items, as pertinent. Document the setting in neutral ways first, using factual descriptors to

identify salient features such as architecture, furnishings, and so on. Then record sensory experiences and visceral impressions. Odors are particularly noticeable in some environments, and wall colors and lighting can influence and affect participant dynamics. Some researchers even consider the site itself an active participant with a distinctive character or **geo-identity**.

Below is an excerpt from a set of field notes Saldaña took while observing at an urban, elementary magnet school for the arts. This brief narrative describes a visual art classroom:

The entire classroom smells of wax crayons. Tables and chairs look slightly worn but well maintained. North wall windows allow natural light to stream in.

Rack labels by the entry door: “Detention Forms,” “Attendance Files.”

On display on the south wall are laminated collages, laminated still lifes in colored pencil. On the shelved counter beneath are plastic tubs with teachers’ names on them to keep student class work together.

Various media supplies are moderately organized in the east wall’s four gray cabinets: paper bags, paper plates, construction paper, white paper, colored paper, crayons, markers, colored pencils, scissors [child and adult sizes], etc. One cabinet door’s handle is broken from overuse. Another door is dented in, making it look slightly warped.

Multiple posters are posted on the cabinet doors: “The ABCs of Happiness,” “Classroom Rules,” “Earth: one house, many rooms,” “De todas las cosas que llevas prestas, tu expresion es la más importante,” “My Declaration of Self Esteem,” “I am me,” “Fire Drill Rules.”

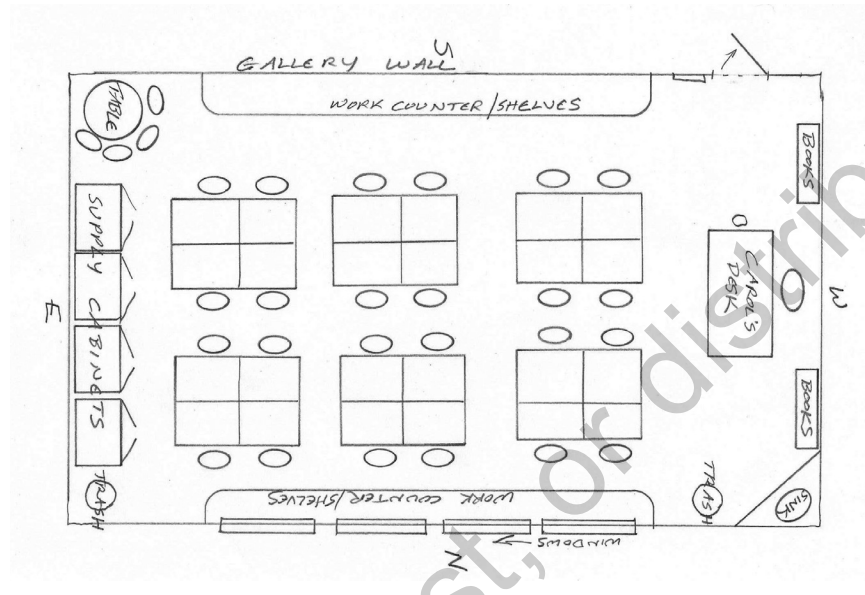
Despite the walls painted “institutional white,” the room has a sense of warmth where children’s creativity is valued through “ordered fun.”

It is also helpful if a **ground plan** or bird’s-eye view of the field site is hand-drawn to label and assess its accommodation of furnishings, spatial relationships, and foot traffic. This might or might not be useful in future analyses, but it helps to have it in your beginning notes for reference (see Figure 2.2). Some prefer to use software for drawing a ground plan, but we find that, for personal field notes, hand drawing it with basic shape templates to approximate scale goes much faster. Finished and cleaned ground plans are appropriate for publications and presentations. Also, some environments such as classrooms might periodically rearrange furnishings for the particular action needed. Simply document what is a typical day’s layout of the space, with any special notes placed in the margins.

Jottings and write-ups

Social action, especially in some sites like school classrooms, happens quickly. When we observe, we create **jottings** or brief, hastily handwritten notes with simple descriptions of action and participant quotes (one of the most neglected items of a beginning

FIGURE 2.2 ● A pencil sketch ground plan of an elementary school's visual art classroom.



researcher's field observations). Jottings are used as an outline for more-elaborated notes made on the researcher's own time.

The actual handwritten field notes themselves are illegible to most other readers, but a direct transcription of the jottings Saldaña wrote as he observed a teacher's classroom is below. Note the use of shorthand (C for the teacher, Carol; Ks for kids) and the use of quotation marks to indicate what was spoken by participants in this "messy" sketch of social action:

C holds up mural "Let me show you what another class did"

C raises hand, Ks do; 1 boy claps

"The people at your table are the people in your group—you will work on a mural"

Ks get poster boards

3-4 children tables

Ks speak English Spanish as they work

C walks, help tape

“Work together as a team.”

More walking

“Now you have to decide what kind of mural you’re going to make”

Kids talking, C “You can talk but quietly, OK?”

Girl: “¿Dónde poner el sky?”

C, “Good job, guys.”

This 94-word set of spontaneous jottings was cleaned up and enhanced later that day into a 232-word field note narrative passage or **write-up** (with an additional 172 words of interpretive commentary, discussed later). The jottings jogged Saldaña’s memory of what he saw and heard, which enabled him to better detail the classroom action he observed. This shorthand helps the researcher observe efficiently and trigger later recall. Notice the straightforward, descriptive, present-tense language used to document the social scene, and the occasional insertion of what participants actually said, in quotes:

Carol shows her class a sample mural: “Let me show you what another class did.” She holds up four sheet-sized poster boards taped together for one lengthy mural that a small group developed and colored. Carol raises her hand to get the children quiet and the children raise their hands and stop talking. One child responds with a clap, but Carol says that response is for another class. She continues: “The people at your table are the people in your group—you will work on a mural.”

One student from each table group is asked to come to the front of the classroom to pick up poster board sheets. During small group work (3–4 children at each table), all children switch back and forth between English and Spanish but the predominant language in small group work is Spanish. Carol walks around the classroom and helps groups tape their four pieces of poster board together. Carol says, “Work together as a team. . . . Now you have to decide what kind of mural you’re going to make. . . . You can talk but quietly, OK?” In one group, a girl holds the poster board sheets together while a boy tapes them. One girl asks her team in Spanglish: “¿Dónde poner el sky?” [“Where do we put the sky?”] Carol continues walking among the children and says to them, “Good job, guys.” . . . [observations continue]

We strongly recommend transferring and/or enhancing jottings into field notes as soon as possible. Many research methodologists recommend finishing them on the same day observations are made while the memories are still fresh. Some even advise not conducting any additional observations until a day’s field notes have been completed.

Observer's comments

Bogdan and Biklen (2007) recommend the addition of **observer's comments (OCs)** throughout field notes. Broadly speaking, OCs are a way of separating researchers' feelings from their empirical observations. They document the subjective impressions of what's going through a researcher's mind and can serve as analytic jottings of the observations in progress. OCs might also consist of relevant sidebars or follow-up reminders for fieldwork. The purpose of OCs is to provide a forum for interpreting participant subtexts and researcher reflections on the social action witnessed.

As an example, below are the field notes of Carol's art class with indented and italicized OCs interspersed throughout them. OCs should get inserted whenever your researcher's instinct feels the need to comment on a particular passage or memory. As an additional formatting tactic, anything actually spoken by participants is bolded to separate the three forms of data:

Carol shows her class a sample mural: "**Let me show you what another class did.**" She holds up four sheet-sized poster boards taped together for one lengthy mural that a small group developed and colored.

OC: Not a bad little piece of art! I'm impressed with what third graders can do. Take a picture of it later for my notes.

Carol raises her hand to get the children quiet and the children raise their hands and stop talking. One child responds with a clap, but Carol says that response is for another class.

OC: That was funny! But it's bad teaching practice for a school to have so many different management techniques in place for children—no wonder he was confused about what to do.

She continues: "**The people at your table are the people in your group—you will work on a mural.**"

OC: I hate working in small groups, but I guess that's me as an adult. Children need to learn how to get along.

One student from each table group is asked to come to the front of the classroom to pick up poster board sheets. During small group work (3–4 children at each table), all children switch back and forth between English and Spanish but the predominant language in small group work is Spanish.

OC: I appreciate how Carol's not being strict on "English only" in her classroom. It's a nice inclusive way of working. I wonder what the music teacher's stand is on this—talk to him later.

Carol walks around the classroom and helps groups tape their four pieces of poster board together. Carol says, "**Work together as a team. . . . Now**

you have to decide what kind of mural you're going to make. . . . You can talk but quietly, OK?"

OC: Nice side-coaching on her part. She seems relaxed, in control.

In one group, a girl holds the poster board sheets together while a boy tapes them. One girl asks her team in Spanglish: “**¿Dónde poner el sky?**” [“Where do we put the sky?”]

OC: I haven't heard Spanglish all that often thus far from children at this school. Keep your ears open for this as I go on.

Carol continues walking among the children and says to them, “**Good job, guys.**”

OC: “Good job” is so overused—even teachers themselves make fun of that phrase when they shop-talk together at professional development workshops.

OCs can be inserted during jottings, as field notes are written up, or later as they are reviewed and thoughts enter the researcher's mind. Most OCs are interpretive commentary at a rudimentary level of analysis and can be considered somewhat as warm-ups for analytic memo writing, discussed later in this chapter.

Time stamps

If time is or becomes a critical variable in a study, researchers should add time stamps in the margins of their written field notes. Time stamps note the beginning, ending, and duration of specific moments or units of action. An example from the art class field notes is condensed below:

9:00 a.m.	Attendance and announcements.
9:04 a.m.	Carol shows her class a sample mural: “Let me show you what another class did.” . . . She continues: “The people at your table are the people in your group—you will work on a mural.”
9:07 a.m.	One student from each table group is asked to come to the front of the classroom to pick up poster board sheets.
9:09–9:17 a.m.	During small group work (3–4 children at each table), all children switch back and forth between English and Spanish. . . . Carol continues walking among the children and says to them, “Good job, guys.”

Time stamping field notes can reveal surprises such as how long it takes certain actions to occur, or how much necessary time is devoted to (or wasted on) selected aspects of daily life. Research studies in education, for example, have noted through such methods the often inequitable balance between teacher-centered instruction and learner-centered activity. Minute-by-minute time stamping is not always

necessary for qualitative fieldwork, but it is most appropriate when the processes of social action suggest that their duration influence and affect participant reactions and interactions in some way. Be cautious of letting boredom or impatience with fieldwork skew perceptions of the passage of time. Time stamping keeps fieldworkers grounded in how long it actually takes for things to happen.

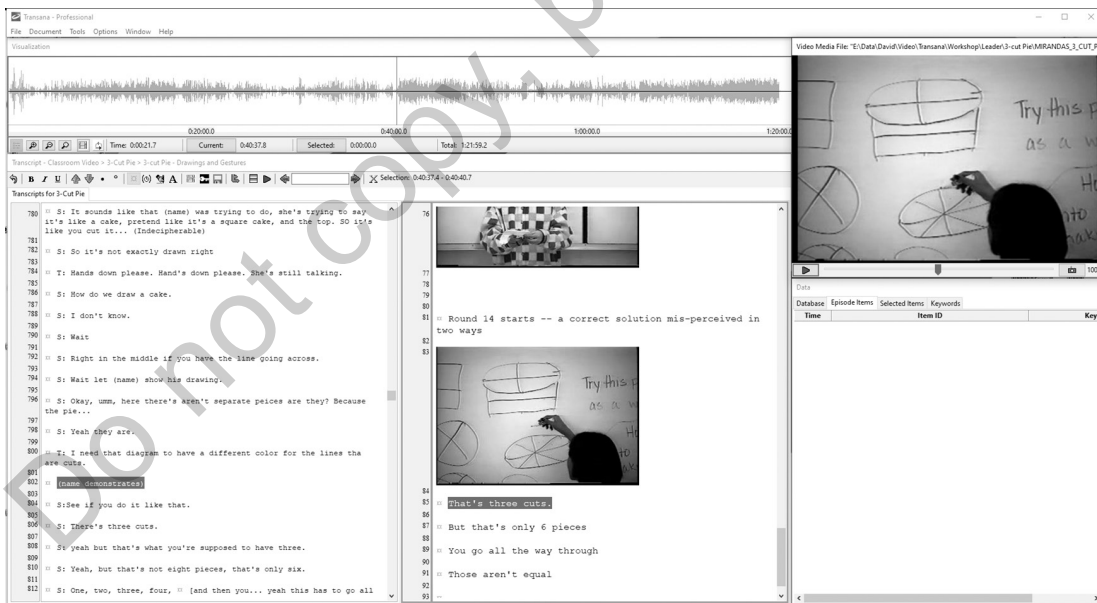
Technical Matters of Fieldwork and Field Notes

We now address a few technical matters that researchers should consider in their on-site observations, write-ups, and data management.

Audio- and video-recording

Digital technology has made the visual and aural documentation of fieldwork quite easy. Some field researchers audio- and/or video-record the field site's action while concurrently writing jottings. Later, they flesh out their field notes while listening to or watching the recording to more accurately document what participants said and did. Recordings become particularly indispensable when studies focus on conversations between participants or their physical mannerisms and movement with others through space. Figure 2.3 is a screenshot from Transana software, just one of several programs that can access recorded video, enabling analysts to later transcribe, code, and annotate their data.

FIGURE 2.3 • A screenshot from Transana video analysis software.



Courtesy of David K. Woods, Transana, www.transana.com

Participants should always be made aware of when their actions and voices are being recorded, but gatekeepers and participants might not permit recording out of self-consciousness or for privacy purposes. The presence of a digital video camera might also intimidate or unduly influence and affect the natural actions of participants (though some eventually become accustomed to its continuous use over time). If permitted, stationary camera placement should be off to the side and angled to capture as much general action as possible, or strategically focused on an area of immediate interest. Handheld recording devices such as a mobile phone or tablet permit the researcher to walk around to pan and scan the setting's action as needed.

We have found that occasional audio-recording serves well for participant observation documentation. One out of every seven to ten clock hours of fieldwork is recorded and transcribed **verbatim** (word for word) to provide a more thorough set of field notes for reflection and analysis. If researchers know ahead of time that a potentially rich opportunity for dialogic exchange might occur, they should be sure to record it. The detail offers them the ability to carefully scrutinize moments of conversational interaction and possibly detect broader patterns of action.

When recording, sometimes nothing more than the mundane will be captured; other times a particularly significant moment of interaction will not get recorded at all. As long as researchers themselves are present as the primary research instruments, however, the experience occurs for general recollection. Researchers should be cautious of unthinkingly recording something to serve as a liaison for their own eyes and ears. Digital tools are supplements, not substitutes, for human experiences. A camera captures visual and aural details, but it cannot generate interpretive meaning.

Fieldwork clock hours

Research methodologists vary in their recommended number of clock hours for participant observation in order to collect a sufficient amount of data for analysis. Some offer that a minimum of 20 clock hours will give an adequate breadth of experiences. Others recommend 30 to 40 hours, with many ethnographers strongly suggesting a minimum of 12 to 18 months' worth of daily fieldwork to become intimately familiar with a culture.

There is no standardized minimum amount of time to spend in the field, though we are admittedly suspect of studies that make sweeping claims after just 5 to 10 hours of observation. The number of hours a researcher spends watching and listening to natural social action should be sufficient to provide her with enough documentation for a substantive analysis and to give her a core understanding of the phenomenon. Some researchers identify **saturation** as a metric for concluding fieldwork—an intuitive feeling that, despite collecting more data, they are learning nothing new about the site and its participants. When one's field notes seem to consistently repeat what has already been documented, the fieldworker should reflect on whether sufficient data have been collected to move on to another stage of the research endeavor.

Do not, however, confuse saturation with boredom. If a researcher becomes fatigued with the sometimes mundane aspects of observation, he can change settings if possible to learn something new. If he is observing one teacher's classroom, for example, he might observe school life in other locations of the facility such as the library/media

center or central administration office area. A change in field note focus might also be in order. Rather than documenting general observations about collective social action, he can hone in on one particular individual for a day and track her interactions with others. Figure 2.4 shows excerpts from a **fieldwork observation log** that records the days and dates, time blocks, number of clock hours, locations, and general content observed at various sites. This log helps researchers account for their fieldwork and better ensure that a variety of settings and activities has been observed.

FIGURE 2.4 • Excerpts from a fieldwork observation log.

DAY/DATE	TIME BLOCKS	CLOCK HOURS	LOCATION	OBSERVATION
Thu., Feb. 2	8:00–9:45 a.m.	1.75	Martinez School Neighborhood	Neighborhood Homes, Streets
Thu., Feb. 2	9:45–10:00 a.m.	0.25	Martinez School Main Office	Literature Rack, Office Matters
Mon., Feb. 6	7:45 a.m.–3:00 p.m.	7.25	Nancy's Classroom	Periods 1–7, Lunch, Occasional Conversations with Nancy
Tue., Feb. 7	7:45–11:00 a.m.	3.25	Nancy's Classroom	Periods 1–3
Wed., Feb. 8	7:45–10:00 a.m.	2.25	Nancy's Classroom	Prep Time, Periods 1–2
Wed., Feb. 8	10:00–11:00 a.m.	1.00	Nancy's Classroom	Interview 1 with Nancy
Thu., Feb. 9	8:15–10:00 a.m., 12:00–1:00 p.m.	2.75	Nancy's Classroom	Periods 1–2, 5
Thu., Feb. 9	1:00–1:30 p.m.	0.50	Martinez School Auditorium	School Assembly
Mon., Feb. 13	11:50 a.m.–12:55 p.m.	1.00	Nancy's Classroom	Period 5
Tue., Feb. 14	7:50 a.m.–12:50 p.m.	5.00	Nancy's Classroom	Periods 1–5, Guest Artist
Thu., Feb. 23	8:45 a.m.–12:30 p.m.	3.75	Linder School Auditorium	Speech Tournament
Fri., Feb. 24	8:50 a.m.–12:00 p.m.	3.00	Linder School Auditorium	Speech Tournament
Mon., Feb. 27	11:45 a.m.–12:45 p.m.	1.00	Martinez School Main Office	Interview with Principal
Wed., Mar. 1	11:50 a.m.–1:00 p.m.	1.00	Nancy's Classroom	Period 5
Thu., Mar. 2	3:25–4:30 p.m.	1.00	Martinez School Library	Faculty Meeting

Field note files

Separate electronic records for each day's set of field notes can be organized and labeled by date, site, and/or by specific participant groups observed. This method is helpful for organization and management of the data corpus. But we have found that, for small to moderate qualitative studies, also maintaining all field notes in one large, dedicated file expedites data retrieval and analysis. The master file enables scrolling fairly quickly through the document to edit and condense multiple sets of field notes to their most salient passages; to cut and paste comparable or related moments together for pattern and category development; to employ rich text, color, and supplemental comment features to code data; to keep written observations and analyses together for more-grounded findings; and to highlight noteworthy passages for later insertion into a final report.

Software used for field note data storage can range from basic text editing programs such as Microsoft Word to specialized qualitative data analysis software (discussed in Chapter 10). Microsoft Excel is a particularly useful program for studies including extensive numeric data for statistical computation and their graphic display, but that software is generally best for mixed-methods studies such as surveys or evaluation research. Overall, use a familiar and comfortable program that permits users to play around with the particular forms of data collected.

Sometimes "Aha!" moments of insight occur at unexpected and inopportune times. Because you may not always have immediate access to a computer, keep a small paper notepad and something to write with or a digital audio recorder or other handheld device nearby at all times for brief jottings or reminders. Paulus, Lester, and Dempster (2014) recommend the cloud-based note-taking system Evernote as a digital tool for quickly documenting, then later retrieving, reflections (pp. 21–22).

Keep electronic files and paper documents private and protected to ensure participant confidentiality; use passwords to protect electronic files and keep paper documents in locked filing cabinets. Of course, always save and back up all work. Several cautionary tales can be found in the research literature about irreplaceable data stolen or lost on malfunctioning hard drives or in the cloud.

Analyzing Observations of Social Life

There are several methods for analyzing qualitative field note data. We discuss two of them in this chapter: reflection and analytic memo writing.

Qualitative researchers do a lot of thinking, and **reflection** is personal, mental immersion in the data, their meanings, and the study as a whole. **Reflexivity** is individual reflection on one's own relationships with the data, the participants, the nature of the study, and even with one's self as a researcher. Think of reflection as looking outward, and reflexivity as looking inward. Both of these play a critical role when the researcher as an analytic instrument mulls over the data and their implications.

Some researchers document their thinking in the form of written journals, as supplemental field note entries, or even as recorded conversations with the participants as they shop talk about the study. We have found that personal and private quiet time

to focus exclusively on the data and to reflect on “what it all means” is the best way to achieve some sense-making and meaning-making about life as it was observed. Reflection’s goal is to consolidate or to join together the disparate thoughts in one’s mind into a coherent whole. And though reflecting is analyzing, it does not always lead to a well-articulated analytic outcome. We cannot teach readers how to think, but we can offer some general things to consider in this regard.

Reflecting on action, reaction, and interaction

Remember that one of the analytic tenets of this text is to observe people in action, reaction, and interaction. Briefly, this suggests researchers conduct their observations and reflect on them with these general goals in mind:

- Analyze what people want or want others to do;
- Analyze how people *react* to their own actions, their given circumstances, or to what is said and done to them; and
- Analyze strings of action and reaction that compose significant interaction moments.

Now consider the following questions as an exercise in analytic reflection:

Focusing on Carol, the elementary school visual art teacher, what did she want and want her students to do throughout the course of the moment documented in the field notes?

How did both Carol and the children *react* to each other’s actions throughout the moment?

How would you characterize the interaction dynamics between the art teacher and her students during this particular moment?

Ideally, responses to these questions go beyond mere repetitive description and into the minds of the participants. Carol wanted the children to work in small groups to create group murals, but a researcher might infer that Carol also wanted to carefully manage her students’ behavior through attention-getting tactics, physical proximity, and positive reinforcement. The children’s collective hand-raising reaction to Carol’s hand signal suggests an effective classroom management strategy at work. As for the interaction dynamics between teacher and students, they seem pleasant and organized, and Carol does not distance herself but mingles among the children as they work, suggesting either on-task monitoring and/or concern for her children’s progress. However, also noticeable is that Carol speaks to her primarily Spanish-language children only in English. Unknown at this point is whether she does so deliberately to enhance their English-learning skills, or whether she is deficient in Spanish.

Notice that much of the analysis depends on your ability to **infer** or to fill in the blanks and elaborate on given field note details. The narrative was hopefully just

enough to give you a sense of being there by recalling your own elementary school experiences, even if you are not in the field of education. Visual and aural memories of the nuanced actions from Carol and her students would be fresher in the fieldworker's mind since he was actually there. He also has knowledge of Carol's ways of working with her other art classes, affording him the ability to compare this class with her younger and older groups. Nevertheless, the purpose of this section is to emphasize that observing and analyzing actions, reactions, and interactions are just some of the primary goals of fieldwork.

Reflecting on routines, rituals, and rules

Social life consists of everyday routines peppered with the occasional ritual, all occurring within and driven by sets of rules. When conducting participant observation, reflect on the routines, rituals, and rules suggested by people's actions, reactions, and interactions. This analysis brings researchers closer to determining the patterned and significant in people's lives.

Return to the field note excerpt of the art teacher's interaction with her class. What can researchers infer are the routines of this teacher and the students? What might they assume are the actions that most likely happen in this particular classroom on a regular basis? The teacher's specific instructions for art projects and her walking among students during independent work might be routines, as is the Spanish-language conversation among students during independent group work. Though not in the field notes, other classroom routines consist of actions such as taking attendance and cleaning the tables for the next class's use.

Now consider the rituals that seem to suggest significance because of their occasional use. To the observer, the art-making is one ritual because it consists of "tribal" (i.e., small group) creation and effort. It is also ritualistic because each small group's microculture (i.e., collective decision-making process of its membership) will be embodied and exhibited in an artifact.

Finally, reflect on what known and tacit rules operate in this classroom. Observe socialized habits, actions of compliance, and the exhibition of power by the participants. Perhaps one of the most apparent rules is the teacher's raised hand to signal the class that quiet and attention are needed. A tacit or socialized rule is the children's automatic acceptance that the people sitting at their table compose their assigned small group. Though not in the field notes, a poster hangs in the classroom that lists specific student expectations and consequences for misbehavior ("Be respectful and kind toward others," "Keep your hands and feet to yourself").

Reflecting on roles and relationships

Routines, rituals, and rules are what people do. Roles and relationships generally hone in on who people are, based on and exemplified by what they do. As researchers observe social life, they infer the roles or characteristics people assume (or are endowed with by others) and how their statuses influence and affect relationships. Analyses of these components of social life tend to focus on the qualities of

individuals—aspects such as their emotions, values, attitudes, and beliefs. A person's actions, reactions, and interactions in particular circumstances or moments also say much about the quality of that person, as do the routines they establish, the rituals they take part in, and the rules they create and adhere to (or breach).

When observing life, attribute descriptive characteristics to people in their roles. It's one thing to be “a teacher.” But it's more specific to say “a white novice teacher” and even more precise to identify her as “a white novice teacher whose pedagogical focus seems centered around classroom management more than the content of her art lessons with elementary school children at this point in her career.” For describing and analyzing relationships, more evocative language seems in order to articulate the back-and-forth, give-and-take nature of the interactions: “Carol is an artist learning the craft of teaching. She exhibits a professional yet motherly demeanor with her students, rendering a carefully managed, secure environment for creative expression.”

Fieldworkers should always stay open to the surprising, intriguing, and disturbing aspects of social settings (Sunstein & Chiseri-Strater, 2012, p. 115). As an example, Saldaña once accompanied another novice teacher he was observing to her car in the parking lot after school. He casually glanced inside her automobile as they continued talking and noticed the floors and seats fully covered with junk food wrappers. He later learned that this teacher suffered from an eating disorder, compounded by the stress of her new job. Life is not always mundane, smooth, and conflict-free. Fieldworkers will often find the anomalous moment or unexpected incident that throws the sometimes tedium of participant observation off balance. These glitches are rich opportunities for further exploration and can be compared against the patterns of regularity documented thus far. Their appearance in the social world can signal an underlying and unresolved issue, a hidden agenda at work, or simply a new and undetected pattern thus far. These also provide opportunities to observe how participants handle moments of disruption, which reveal much about their values system and the interpersonal dynamics of their roles and relationships.

The reflections above focused on thinking. Now we discuss writing about thinking.

Analytic memoing of field notes

An **analytic memo** is an extended researcher commentary stimulated by field notes (and other data such as documents and interview transcripts). Think of memos as sites for researchers to “dump their brains” freely in their own words about what they've observed. They are reflective narratives that expand and expound on observations by taking researchers' thinking and writing up a notch. With memoing, researchers attempt to transcend the descriptive nature of their field notes and venture into richer analytic connections and insights.

“What is going on here?” or “What is happening here?” serve as open-ended prompts for reflection after observing a slice of natural social life. But those questions can seem too broad for some to tackle at first and suggest summary rather than synthesis, so 14 specific prompts are provided to help focus initial analyses (Saldaña, 2016). During or after field notes have been composed, the researcher reflects on and writes about

1. The participants' actions, reactions, and interactions;
2. The participants' routines, rituals, rules, roles, and relationships;
3. How the researcher personally relates to the participants and/or the phenomenon;
4. What the researcher finds intriguing, surprising, and/or disturbing;
5. Code choices and their operational definitions;
6. Emergent patterns, categories, themes, concepts, propositions, and assertions;
7. The possible networks and processes (links, connections, overlaps, flows) among the patterns, categories, themes, concepts, propositions, and assertions;
8. An emergent or related extant theory;
9. Any problems with the study;
10. Any personal or ethical dilemmas with the study;
11. Future directions for the study;
12. The analytic memos generated thus far (called meta-memos);
13. Tentative answers to the study's research questions; and
14. Passage drafts for the final report of the study.

If writing is thinking, then composing a memo is a processual form of analysis. Writing the memo condenses real-time, lengthy observations into richer passages of meaning. To some research methodologists, analytic memos are the transition techniques between data collection and the final report.

Examples of analytic memos. A memo is stimulated most often by the particular contents of a set of field notes. Reflection on what actually happened keeps researchers grounded in the realities of the setting while transcending them to higher or deeper levels of meaning—a compound form of reflection we label **highdeep thinking**. The art class field note excerpt serves as an example of how to compose memos about the phenomenon of interest: a white novice teacher's experiences with urban Hispanic youth.

We find it best to compose the memo first, then determine which of the 14 prompts might have been addressed. This is because memos, like front matter for field notes, should be labeled with their date of composition and a representative title that captures both the content and the focus of the analysis. Below is one memo that zooms in on a pattern of action, reaction, and interaction observed in Carol's teaching. Note its informality and unabashed honesty:

January 21, 2020

REACTION PATTERNS: CLASSROOM (MIS)MANAGEMENT

Carol's "on your feet" work is relaxed and controlled with this class, but Periods 3 and 6—the classes from hell—are when she lets the children's erratic energies get to her and she picks up on their vibe. I've often said that a visiting or one-class-at-a-time teacher inherits the classroom culture of another teacher's children. Carol's best efforts to manage Periods 3 and 6 are thwarted by their home teacher's poor management styles.

Part of Carol's solution may just be continued professional development and on-the-job learning. She's trying to use the same management techniques—a pattern of teaching—with every single class, when a class-by-class management approach may be needed. I wonder if it's my place to offer that suggestion to her. She may take offense to it or be embarrassed, but my intentions are to help her out. I even caught myself giving a stern look to some boys in Period 6 when they were horsing around and they stopped and got back on task. If a pattern isn't working, it's got to be changed. Rules just aren't meant to be broken—they're meant to be revised.

This next memo focuses on the interactions and relationships observed between the participants:

January 22, 2020

RELATIONSHIPS: WHITE TEACHER/BROWN STUDENTS

Interesting is how Carol seems to see the two-language classroom as a "given." She doesn't enforce an English-only policy of any kind; she speaks however she can (her knowledge of Spanish is very limited) and lets the students speak however they feel comfortable. Perhaps visual art to her is a "universal language" that binds them together. What children create with their hands is important. She praises their process and products. There's also a valuing of their original ideas. She didn't mandate what the content of their murals should be—she left that decision to the group, empowering them with creative choice, something children have very little of these days.

Memos should incorporate observational evidence such as participant quotes or descriptive moments of interaction to support the researcher's analytic constructions. This memo tackles the primary research purpose of the study:

January 23, 2020

RESEARCH QUESTION: A UNIVERSAL LANGUAGE

The purpose of this study is to determine in what ways a white novice teacher instructs a predominantly Hispanic school population. Carol, as

the case study, is still focused on the routine expectations and demands of teaching as a profession. The language barrier between her and her students has compounded some of the difficulties she has communicating with them. But the universal language of a smile and pleasant, affirming voice (“Good job, guys”) seems to have created a loving relationship between most of them. She’s rarely seated at her desk while children work; she’s continuously roaming the classroom and dialoguing with them. Perhaps Carol, as a visual artist, relies on images to communicate her teacher self. I’ve noticed how strongly gestural she is with her hands in front of a class, but less so with teacher colleagues.

Memos serve as a transitional database, of sorts. They transform the raw data of fieldwork into more condensed forms. The collective memos then become the new material for the analyst’s synthesis and high-deep reflections on the phenomenon of interest. The process is one way to transcend the local and particular of a site and to progress toward more general and transferable meanings.

An occasional **meta-memo** integrates the accumulated memos to date to compose an even richer composite of the field experience. Like the game *Three for All!* described in Chapter 1, the meta-memo below brings the three reflections from January 21, 22, and 23 together (CLASSROOM (MIS)MANAGEMENT, WHITE TEACHER/BROWN STUDENTS, and A UNIVERSAL LANGUAGE) to think about what they might have in common—that is, to pattern and unify them:

January 24, 2020

META-MEMO: UNIVERSAL AND UNIQUE COMMUNICATION

It seems it doesn’t matter what language they speak—children are children. And when teachers from one culture work with children from different cultures, the universals must be found. These universals consist of nonverbal affirmations, vocal tones of pleasantries and respect, comfortable proximity, and communication through a medium—like visual art—that transcends language barriers.

But all classes are not the same. Each classroom is a subculture unto itself. Some are composed of smooth routines, and others are composed of disruptive rule-breaking. A universal pattern of classroom management techniques does not translate from one classroom subculture to another. The subtle dialects must be discerned and new vocabulary learned to communicate and create a more productive mini-social world.

For more on the intricacies of analytic memo writing, see Emerson, Fretz, and Shaw (2011) and Saldaña (2016).

Closure and Transition

Participant observation is just one primary way to analyze life. Its advantages include documenting social actions as they naturally happen and utilizing the researcher's mind to reflect on and interpret their meanings. Across time, researchers' collective experiences with fieldwork accumulate

to help them infer and inductively analyze social patterns and their interrelationships.

People create and use products of varying kinds. The next chapter focuses on analyzing the documents, artifacts, visual images, and digital materials of our social worlds.

Resources for Participant Observation

The following resources offer additional guidance regarding methods of participant observation and field note analysis:

DeWalt, Kathleen M., and Billie R. DeWalt. (2011). *Participant Observation: A Guide for Fieldworkers*, 2nd edition. AltaMira Press.

Emerson, Robert M., Rachel I. Fretz, and Linda L. Shaw. (2011). *Writing Ethnographic Fieldnotes*, 2nd edition. University of Chicago Press.

Sunstein, Bonnie Stone, and Elizabeth Chiseri-Strater. (2012). *FieldWorking: Reading and Writing Research*, 4th edition. Bedford/St. Martin's.

Analytic Exercises for Participant Observation

1. Locate an interior public space (e.g., a shopping mall, restaurant, department store, gym) where a moderate number of people gather for a particular purpose. Sit and/or walk around and observe the actions in the space for 20 minutes without taking any field notes; simply watch and listen. Then, go to a private place to work and write or type out as much as you can recall from the observation experience.
2. Do the same exercise as 1 above, but write down jottings as you observe. Then, go to a private place to work and flesh out the field notes and add periodic OCs.
3. Do the same exercise as 2 above, then compose three separate analytic memos triggered by your field notes, and finally compose a meta-memo about the three.
4. Draw a ground plan of one room in your current residence or a portion of the indoor site you observed for exercise 1. In a separate narrative, describe the general look or geo-identity of the setting.

Sample Field Notes for Analysis

Excerpts from a set of Saldaña's field notes on observing a junior high school drama teacher, Nancy (a fictitious name or **pseudonym** to protect the participant's identity), and her class are included below. Note the use of personal shorthand (N = Nancy, G = girl, B = boy), the italicized and indented OCs, and the bolded quotes. This observation was audio-recorded, but only notable passages were transcribed.

Review the field notes and compose three separate analytic memos based on what you infer and interpret from the action described.

February 28, 2005 (Monday)—“Collaboration”

Escobar School, Drama Room, 11:50 a.m.–1:00 p.m.

Jr. HS Theatre Class (Nancy, 9 Hispanic girls, 5 Hispanic boys, all 8th graders)

Before 12:00 noon class, a few students start to enter the room.

N: “Who’s a dancer in the jukebox scene?”

G: “Ms. N. what are we doing here today?”

N: “I don’t know, I thought we’d just hang around.”

OC: Friendly banter, the kind she’s noted for.

There is a discussion on the cheerleading competition from last week. **N: “Hey, I think we did a good job on that . . . our girls did really good.”** Students begin standing around N’s desk. N continues to ask individuals, **“OK, whoever’s in the jukebox dance needs to go to dance. Are you in the dance? If you’re in the dance you’re supposed to go to dance.”** 2 Bs bounce balls by the desk.

N: “We have to work on *La llorona*.”

G: [in an anglicized dialect] “La horona.”

N: “Is anyone here in the jukebox dance?”

B: “I am.”

N: “No you’re not.”

B: “I am, I think.”

N: “You don’t know if you are?”

About seven students are clustered around N’s desk.

OC: Students could be talking to peers away from the teacher but they gravitate around her. That’s a sign of love/like.

Class begins on time. **N: “The rest of us let’s put two tables in a big square and sit together. Move it, move it.”** Students connect two tables and move chairs around the table format and sit.

OC: Tables shifted for each period reflect the flexibility of N.

Jose comes in late. **N: “Where were you, Jose?”** He explains that he was in the playground.

N: “No, I need to have a pass before I’ll let you in this class.” He leaves.

A five-page, two-sided first draft outline of *La llorona* is distributed to the class around the table. There is no pagination on the script, they are not collated, and the first and last pages of the script are on opposite sides of the same page. N has a stapler and gives students explicit instructions on which page is first so it can be laid face down with other pages following.

OC: *N usually has her act together. I wonder if her illness for the past two days kept her from having this text prepared?*

N: “This is the script so far.” A student comments on the typos. **N: “OK, so I can’t type. . . . We are going to read through this. . . . There are some places where it needs narration. . . . If you were these characters, on stage, what would you add to the script? You have to think how would these people speak. They wouldn’t say, ‘Hey homie.’”** The group laughs.

Jose returns to the classroom. He has no pass. There is a 30-second discussion about his tardiness. Jose states that the playground monitor told him he had 15 minutes left before the next class.

N: “Didn’t you get the clue when everyone else came in . . . that you should come in?” She insists that Jose get a pass from the monitor. He leaves.

OC: *Nancy is firm about the procedure. Although Jose tries to state his case, he does not back-talk to Nancy rudely but acquiesces.*

OC: *Refer to play script artifact for text.*

N reads the opening stage directions from the script. N says they’re going to use tin luminarias with Christmas tree lights in them because they can’t use candles on stage. She continues reading stage directions. There are marimba and guitar music playing. She explains the term *crescendo* as “gets louder” for the group.

OC: *N’s script starts off with a bang. There’s a nice mood set and theatricality to it.*

N: “Does that kind of give you an idea of what we’re starting with? So we start off with these *La llorona* figures. They’re going to have these white streamers on them and they’re going to be moving, and we won’t be able to see their faces but we’ll see these things moving and then we’ll hear the chimes.”

OC: *N has already conceptualized some of the staging of the piece. Again, time efficient, thinking through things ahead of time.*

N assigns people to read selected lines although there are no dialogue indicators on the play script. The opening scene is the set-up for a birthday party. N asks, **“OK, what can we add in there because this is a surprise party for this girl, let’s say she’s 13 or 14. What else can you say? ‘Surprise, Happy Birthday, Maria.’ What else would her friends say to her?”**

OC: *This script is a framework, yet she’s allowing students to give input—to flesh out and take ownership of the piece. Even though there’s a product as an ultimate goal, N is still concerned with improvisational process.*

G: “It doesn’t sound right.”

N: “What doesn’t sound right?”

They discuss the age of the person having the birthday. N asks the group, **“What age should we make her in *La llorona*? 15? OK, we need to add something in Spanish, OK? I know you guys know Spanish.”** One girl says, **“I don’t.”** A few students share **“Feliz**

cumpleaños." N asks them how cumpleaños is spelled; N: **"I know how to spell 'Feliz.'"** She writes it in her script.

Jose comes in with his pass and gives it to Nancy. He joins the group and N asks him to share a script with someone so time won't be wasted collating another.

OC: *Time again.*

N reads a line from the play: **"Maria, the most beautiful of all girls in the world, just like the Maria of *La llorona*."** A G says it's a **"corny line."** N: **"What should we change that to?"**

OC: *N states no offense at a student's honesty, but instead asks for an alternative line. Open, accepting.*

One G is confused and thinks the birthday girl is the character of *La llorona*. N explains the character will be playing her in the play-within-a-play. A student asks who will be playing the character. N looks through her papers. One student laughingly says **"Soledad."** N: [jokingly] **"Soledad. Ran away. *La llorona* went to the river."** [students laugh]. N: **"Sonia is gonna be the *La llorona* of the rap version."** A student asks if there will be two stories. N asks them to get back on the script for an alternative line. She explains how the transition should be subtle. N: **"We just can't go, 'Let's do the play of *La llorona*!' and start doing the story on stage."** She explains how the transition is to work.

N asks how the next line is to be spoken; N: **"OK, who can read this in Spanish because I don't know what I wrote, Mrs. Garcia told me."** The students read, **"*La llorona* era muy linda."** N: **"What does that mean?"** A few students translate for her and there is banter.

A B thinks another line is not right: **"You have grown up to become a beautiful young woman."**

N: **"OK, so what can we put for her dad? If it sounds funny what could we put?"**

B: **"Cause Mexican dads, they don't say that."**

The Bs jokingly suggest other things. N: **"OK if your dad was on the off-chance telling you you're beautiful, how would he say it?"** Gs giggle. N: **"I know, it's a stretch, it's a stretch."** Girls offer some lines.

N: **"How would he say it in Spanish? What's a term of endearment in Spanish, like 'beautiful.'"**

B: **"Que linda esta, mi hija."**

G: **"Yeah, like that!"**

N: **"What is that?"**

B: **"I don't know."**

OC: *He probably does and doesn't. Sometimes there are catch phrases that you know are appropriate but don't know the exact translation.*

[field notes continue]