Tool 3.23: Sample Note Taking Protocol for Small Group Sessions

Why is this tool useful?

This tool outlines a sample protocol for taking notes during large group meetings such as community visioning sessions ([see Tool 2.3](#)) or town hall meetings where participants break out into small groups. It is important to take detailed field notes at such meetings so you can capture the input of community members and this input can later be transcribed and used as qualitative data in your research project. It is helpful to develop a note taking template for consistency. Note that facilitation and note taking are two distinct roles: a facilitator helps the conversation move forward while a note taker listens, takes notes of the discussion, and does not interfere with the conversation. This sample note taking protocol should be customized to fit your organization and community's needs.

Before the meeting begins…

☐ Make sure you have a notebook or laptop on which you can take notes.
☐ Make sure you have talked with the small group's facilitator and read the facilitator's guide so you know the plan and agenda for the discussion.
☐ Make sure you read this note taking protocol and ask any questions you may have to the meeting organizer!

Before the small group discussion begins…

- **Identify yourself to the group** – e.g. *"I'm a note taker helping to document the visioning process. We are taking notes to make sure that what you share today gets captured and so we can include your voice in any proposals we make to the City about this issue. We will not identify you by name unless you want us to."* (Feel free to put into your own words)
- Make sure you sit somewhere central where you can hear everyone in the group, but also out of the way so that you do not block anyone's view or ability to participate.
- Review the small group discussion questions to make sure they are clear to you.

During the small group discussion (When taking notes…)

- Notes should be as **clear and organized** as possible.
- **Be specific** - notes should document what is being said as specifically as possible.
  - However, you do NOT have to capture every word verbatim (unless you hear a great quote!) and can shorten and abbreviate what is being said when needed.
    - For example, if someone says "I think there should be affordable housing for everyone in the Bronx." A strong note would read *"Participant wants*

affordable housing for all in the Bronx," while a weaker note would read *"Affordable housing important."*

- o If you use short hand or abbreviations, be sure it is something you will be able to decipher later when you type up your notes.

- **Write down important or interesting quotes** exactly (or as much as you can remember), in quotation marks.

- **Indicate whether participants agree or disagree on an issue, if relevant**.
  - o If discussion arises about a particular issue and all participants are in agreement, indicate this in the notes (e.g. *All think that local hires are important.)*
  - o If there are dissenting viewpoints, capture those as well. (e.g. *Three think that new housing should give priority to Bronx residents, three think that new housing should be for any low income New Yorker).*

- **Note questions that come up during the discussion.**

- **Do not interfere with any activities of the meeting/discussion**. The note taker's role is to listen carefully, and document what is being said – not to participate or influence.

- **Check in with your biases and assumptions.** Be sure you are writing down what is said by participants in the group, not your own opinions or interpretations of what is said.

After the meeting…

- Type up your notes as soon as possible after the meeting. The longer you wait, the more you forget.

- Make sure to include the date and your name and contact information somewhere on the notes.

- Please also write-up some overall impressions from the discussion or themes that emerged, please do so but make sure to clearly mark them with the heading "Themes/overall impressions"

- If there are questions that come up during the discussion, put them in a separate section titled "Questions." These questions can also be included in the body of the notes if they were part of the discussion.