

Tips and Tools for Taking Notes during Community Engagement Sessions

This protocol is intended for use with your community engagement session. The first page includes information about the role of the notetaker and some tips for notetaking. The remaining pages provide a notetaking sheet that can be tailored to your community engagement session.

Role of the notetaker

As a notetaker, you will use a structured template to capture key moments and observations during the community engagement session. Your role is to serve as a second set of eyes and ears to identify important details the facilitator may miss while leading the session. You may also be asked to help keep time to ensure all questions are addressed. Each section of the protocol will include suggested times to assist with timekeeping.

Notetaking tips

Recording responses

Whenever possible, document participants' statements in their own words. This ensures accuracy during analysis and provides direct quotes for reporting. If appropriate, and with participants' consent, consider audio recording the session. You can then reference the recording to or fill in any gaps in your notes or create a transcript.

Contextual notes

In addition to capturing what is said, take note of contextual details such as participant demographics (e.g., number present, roles), group dynamics (e.g., if someone dominates the conversation), or notable reactions (e.g., tension around certain topics). Both spoken and unspoken observations are important for qualitative analysis.

Post-session review

Within 24 hours after the session, review and clarify your notes, expanding any abbreviations or shorthand so they can be easily understood by others. Upload the finalized notes to a secure storage location for analysis.



Sample Notetaker

Session information

Date and time: _____

Facilitator(s): _____

Notetaker(s): _____

Group participants

Name	Organization, role	[Other salient characteristics]

Questions

Section 1 topic: [_____] ([_] minutes)	
<i>Facilitator instructions. [Insert facilitator instructions here.]</i>	
Question	Notes
Q1:	
Q2:	
Q3:	

Closing (_____ minutes)

Thank you for your input. Before we close, is there anything else you would like us to know?

Thank you again for your valuable input. As a reminder, our next step is to analyze this data and use it, as possible, to inform [_____].

Finalizing data collection

- Add any additional comments within 24 hours after the meeting.
- (If setting is virtual) Paste the chat log at the end of the notetaking document.
- Review and synthesize key takeaways as a group.

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