

Best Practices When Conducting Observations

PRESENTED: January 2020 **REVISED:** September 2020



PREPARATION

1

Remember the purpose of your observation.

Use the data to teach and improve program delivery. You are also there to learn! Approach observation with a feeling of appreciative inquiry.

2

Decide how you will capture the data.

Possibilities include installing a video camera in the room, observing in person, or observing in person AND capturing audio with a smartphone.

3

Observe unannounced.

Get an authentic view of how the program is being implemented.

4

Observe frequently.

Ideally, observe between 10% and 33% of sessions to get an overall impression of the program delivery. Observing regularly has the added benefit of de-stressing the facilitators. Observation and feedback as part of regular program practice create a culture of continual improvement.



OBSERVATIONAL PERIOD

5

Maintain positive-to-neutral composure and body language.

Facilitators may look to you for feedback on the session while it is ongoing. A consistent and positive appearance will reduce focus on you and put it back where it belongs—the participants.

6

Assess fidelity to the curriculum, delivery, and engagement with participants.

Note context and any irregularities or special circumstances to be taken into account such as fire alarms or particularly distracting participants.

7

Use an observation form.

Note time, date, location, and observer. Take notes and write down your impressions. This form should be for your use only. You can discuss your observation once you have had a chance to think through the session.

8

Bring a copy of the curriculum.

Don't rely on your memory while you are observing.

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AFTER OBSERVATION

9

Save constructive feedback for a later discussion.

Think through the session, prioritize discussion points, and be prepared to suggest improvements.

- Answer "How did I do?" questions by reminding the facilitator you need time to process notes first.
- Mention one or two points that impressed you (if any).

10

Thank the facilitator.

Thank the facilitator for allowing you to observe.

11

Share data availability information with the facilitator.

Let the facilitator know you will process your notes and provide more in-depth feedback in a timely fashion.