

**What are you looking at?**  
**Intentional observational  
strategies for evaluation**

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Evaluations can be improved if we add  
intentional observation...

to everyday evaluation moments.

# Direct Observation

webinars

meetings

Pre- and post-meeting  
conversations

Observational moments

conference calls

program planning meetings

side conversations

chance encounters





Seeing

VS



Observing





**Engagement** - you became curious and wanted to participate

**Motivation** – few probably wanted to be the only one to not find three vehicles

**Focus/Attention** - your mind had a goal, something specific to search for



Pre-observation



During observation



Post-observation



# Things to do:

- find a purpose  
→ 2pm deadline
- find meaning
- clean desk



### Observation Sheet for Meeting

#### I. Overview

Location:

Date:

Individuals present at the meeting? (seating arrangement)

Individuals, on the project, who are not at the meeting?

general information

#### II. Goals of observation

1. Collect baseline data on current procedures (stated and unstated)
3. Record what language is used to describe the program (formal and informal)

observation goals

#### III. Observational focal points

Focal point

Notes

<p>A. <u>Language/talk</u> How do they talk about the project? What do they say about clients? What shorthand do they use to discuss the program?</p>	
<p>B. <u>Boundaries of Activities</u> Are there discussions about activities outside the organization? What do they consider under and outside of their control?</p>	
<p>Focal points C, D, E, etc.</p>	

key focal points with notes

#### IV. Other comments/thoughts

What was missing? What new questions were raised?

other comments or thoughts



⇒ How are success + progress talked about?

Who?

What?

How often?

Surprising?

Missing?



# During observation



Focus your  
attention



What's missing?

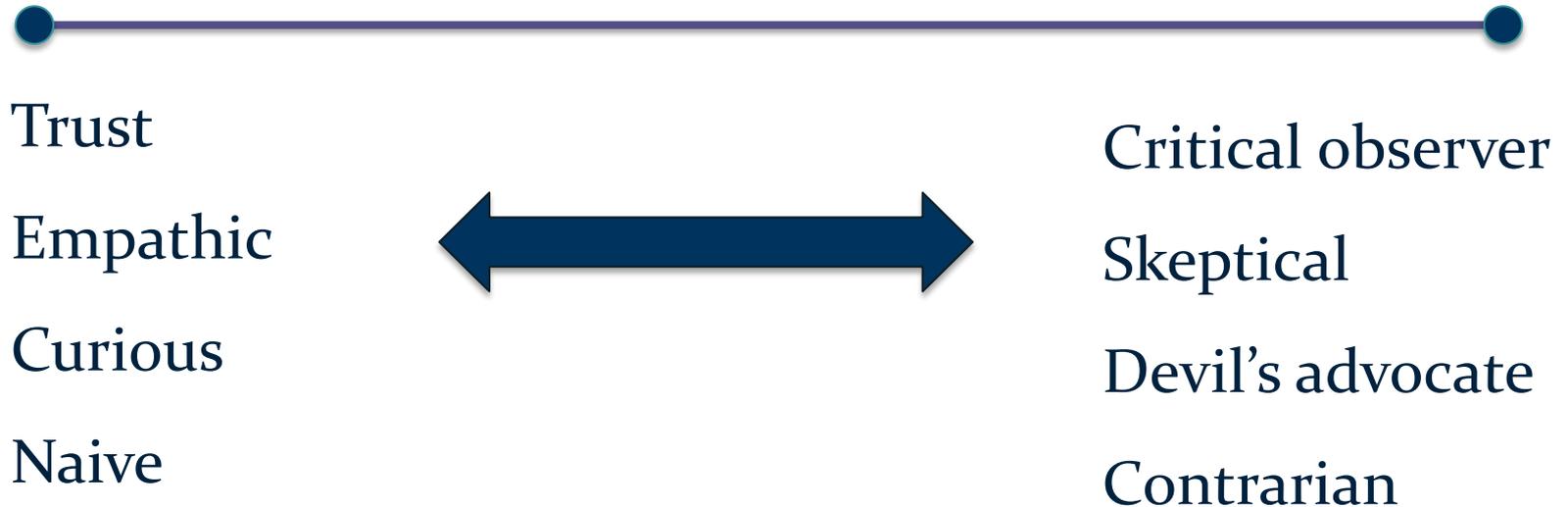


# Vary your stance





# Vary your stance





# Maximize your observational muscle

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Observe in short spurts

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Jot down memory triggers

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Try single tasking (especially important with webinars)

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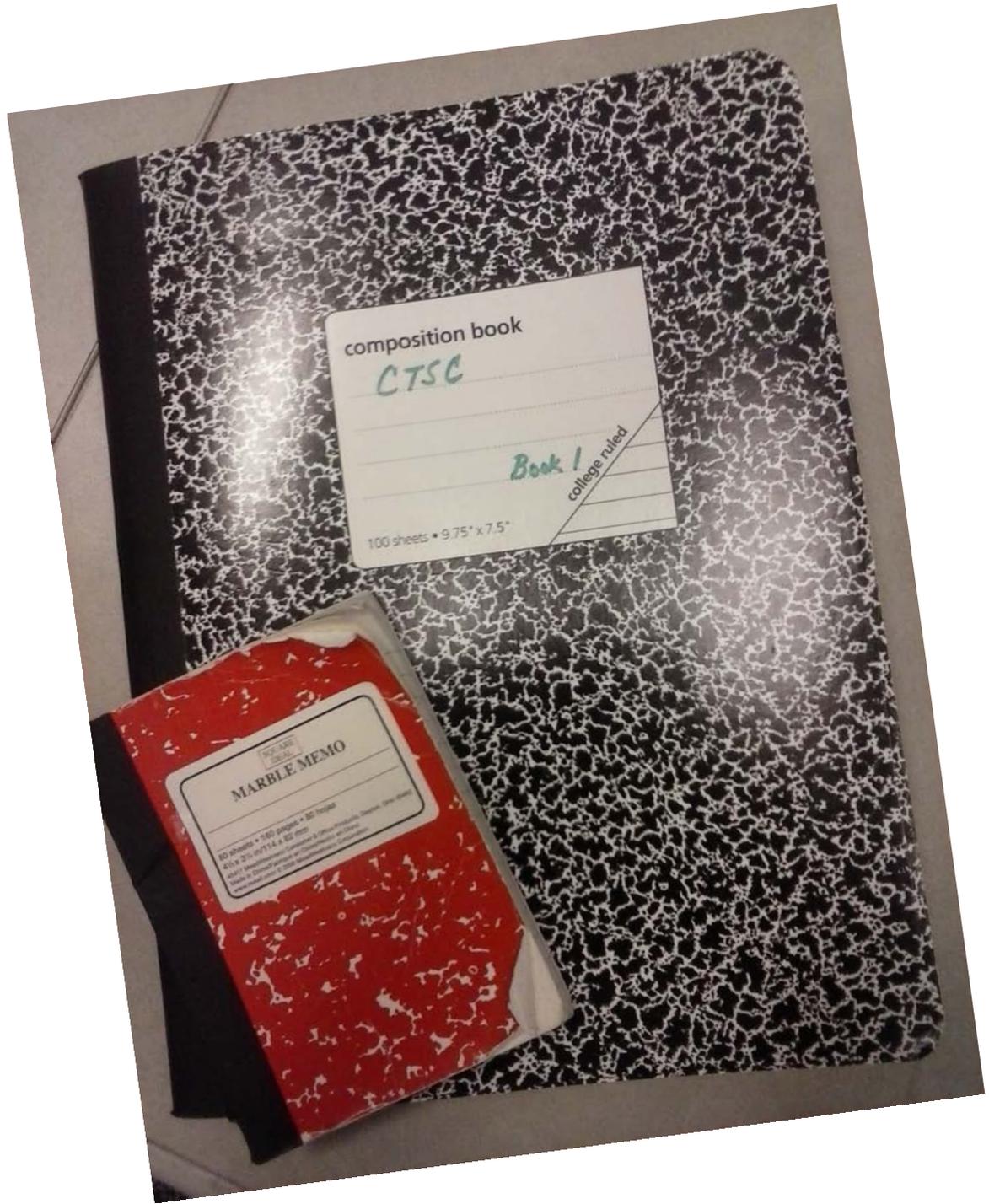
Be patient



Record what happened

Reflect on what happened

Plan for future observations





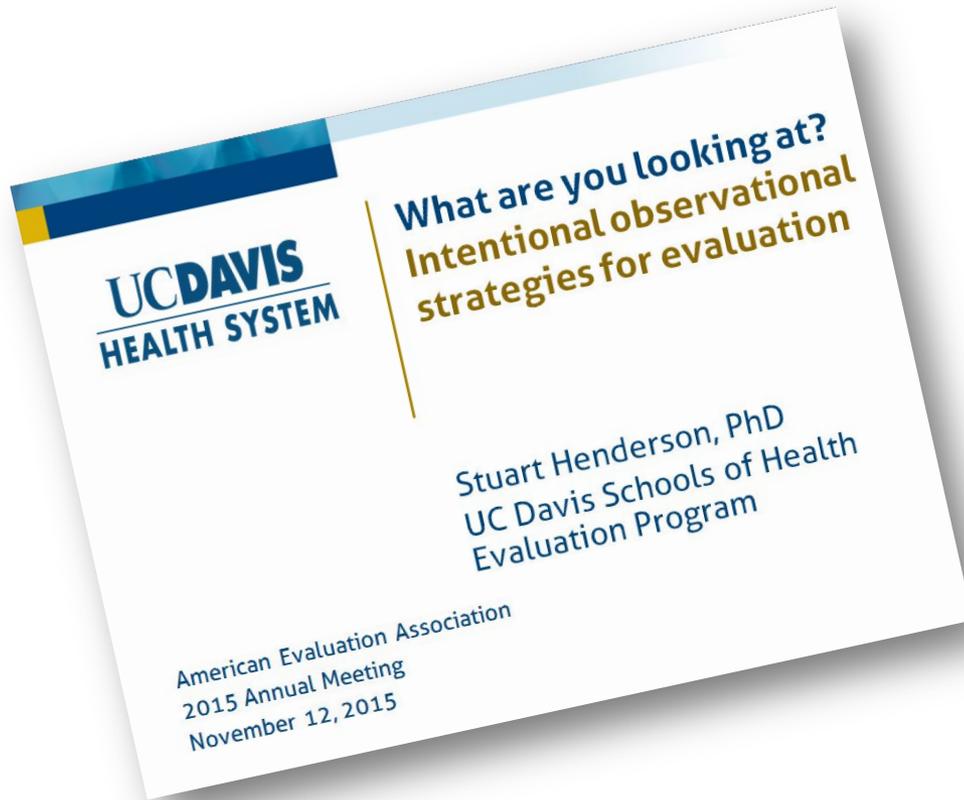
# Final thoughts



**Engagement** – ask questions about everything; be curious

**Motivation** – [don't wait for motivation]  
Make observation a regular practice

**Focus/Attention** – use a systematic approach



Slide deck is available in the AEA public elibrary

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# References

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Lofland, J. and L. H. Lofland. 1995. Analyzing Social Settings: A Guide to Qualitative Observation and Analysis, 3<sup>rd</sup> edition. Belmont, CA: Wadsworth. [see also 4<sup>th</sup> edition from 2006].

Patton, M. Q. 2015. Qualitative Research and Evaluation: Integrating Theory and Practice, 4<sup>th</sup> edition. Thousand Oaks, CA: Sage.

Freeman, M. and J. N. Hall. 2012. “The Complexity of Practice: Participant Observation and Values Engagement in a Responsive Evaluation of a Professional Development School Partnership,” American Journal of Evaluation. V33(4):483-495.