

OBSERVATION

Observation is one of the most basic data collection methods. It involves 'seeing' things, and recording and analysing what is seen. Observation is sometimes used as a method on its own, but is more often used in parallel with other data collection and analysis methods. There are many different types of observation methods. These include structured observation, expert observation and participant observation.

Observation is one of the most basic data collection methods. At its most simple observation involves 'seeing' things – such as objects, processes, relationships and events – and formally recording and analysing what is seen.

Within monitoring and evaluation (M&E), observation can serve several purposes. Firstly, it can be a primary data collection method that generates new information. This kind of observation is most useful when the information required concerns tangible and observable things. For instance, within a school or hospital observation could be used to examine the condition of latrines or assess progress towards completing new buildings.

Secondly, observation can be used to triangulate information obtained through other data collection methods such as interviews or focus group discussions. For example, a head teacher might say that a school has an effective anti-bullying policy. During a school visit an evaluator might see lesson plans on bullying, or pictures on the wall concerning bullying, which would support this claim. On the other hand the evaluator might see examples of children being bullied by other children or teachers, which might contradict the head teacher's view.

Thirdly, observation may provide information that can help explain results acquired through other data collection tools or methods. For example, attendance records might show that few women attend community meetings. Observation of the meetings might show that women are ignored when they try to speak, or are subject to abuse. In this case, observation could help explain why women are not regularly attending meetings.

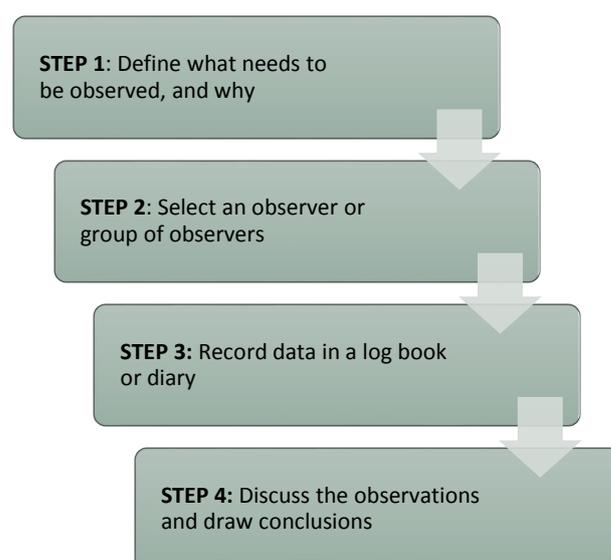
As a formal data collection method, observation can be used at any point of a project or programme cycle from design and planning through to implementation and evaluation. Observation can be used as a method on its own, but is more often used in parallel with other data collection and analysis methods. Observation forms part of many complex methodologies, such as Most Significant Change (MSC) or Participatory Learning and Action (PLA).

Different types of observation

There are many different types of observation. Some of these are described below.

Informal observation: Informal observation is carried out when project or programme staff make field visits or attend events or meetings. As with informal interviews, informal observation helps shape people's ideas and opinions, and supplements information acquired through other methods. However, observations may not be formally recorded even though they might help shape M&E conclusions and findings.

Structured observation: Sometimes known as direct observation, structured observation is a more systematic method of observation. There are normally a few standard steps to be followed. These are described in the diagram below.



The first step is to agree amongst different stakeholders **what needs to be observed**, and why it is important. Once this has been decided, a checklist can be produced, containing a list of things to be observed, and a statement of how they will be observed. Often, a log book or diary is prepared so that observations can be systematically recorded.



STEP TWO

The next step is to **select an observer or a group of observers**. Sometimes this can be done after step one, and sometimes beforehand, to allow the observer(s) an opportunity to help define the observation checklist.

Structured observation can be done by evaluators or by project or programme staff. But structured observation can also involve the intended beneficiaries of a project or programme in planning the exercise, observing and analysing findings.



STEP THREE

The third step is to **record data in a log book or diary**. Depending on the checklist, observations could include notes on what happened, when it happened, where it happened, how it happened, and who was involved.

Observations may be based on tangible facts, such as people entering a building or using a particular kind of service. But they may also include perceptions or opinions, such as possible explanations of different people's behaviours, why things happened in the way they did, or what the observations might mean.



STEP FOUR

Finally, the recorded observations are discussed in order to **draw conclusions** and/or make recommendations. Sometimes, discussions may be limited to the team carrying out the observations. More commonly, wider

stakeholders such as beneficiaries or project / programme staff are involved. Used in this way, structured observation becomes a participatory tool for data collection and analysis.

Expert observation: Whilst structured observation may be carried out as a participatory exercise, expert observation is usually carried out by someone with specific expertise in an area of work. Their task is to observe and record information on a topic within their field of expertise. Expert observation is often used in circumstances where interviews might generate limited or unreliable information. For example, expert observation could be used to generate information on:

- the quality of teaching in a classroom;
- how civil society representatives engage with policy-makers during policy debates;
- changes in culture or attitudes within supported organisations; or
- how medical staff carry out specific tasks in a hospital setting.

In cases such as these, expert observation may be the best way (or the only realistic way) of assessing change. However, expert observation might also be a very expensive way of establishing change as experts are often costly to engage.

Participant observation: Participant observation is a specific anthropological approach to research which involves living alongside communities to gain a more accurate picture of what is happening and what is changing. The rationale is that a participant observer builds up trust over time, and can therefore acquire much more detailed information from a community. Participant observers can also help the community by articulating community needs and opinions.

Participant observation is relatively resource intensive, and is rarely used within monitoring and evaluation (M&E). It should be noted, however, that many community-based organisations (CBOs) are based within communities, and are engaged in participant observation by default. The fact that they are rooted within the communities means that CBO staff can experience first-hand how change happens within these communities

Strengths and weaknesses

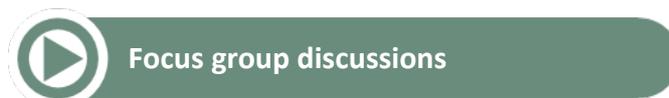
In the right circumstances, and used well, observation can be a very effective data collection tool. However, there are a number of potential challenges that need to be identified and addressed.

- The quality and usefulness of data gathered through observation is often highly dependent on the observer's observational and writing skills. Findings may often be open to different interpretations.
- Different people can observe different events, processes and objects, and come up with different conclusions. It is important to remember that there is as much potential bias in findings identified through observation as in findings generated through interviews.
- Observation may focus primarily on observable behaviour, but doesn't always explain the motivations for that behaviour. Observation may therefore provide only part of the picture.
- Perhaps the most important potential weakness is that the presence of an observer may influence the behaviour being observed. For example, if a teacher knows their lessons are being observed, and findings recorded, they may not behave normally.

“Many different tools for monitoring and evaluation have been developed over the years, but a good set of eyes and ears remain the best data collection tools”

Further reading and resources

Other papers in this section of the M&E Universe deal with interviews, focus group discussions, surveys and photography and video. To access these papers directly, click on the relevant links below.



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INTRAC is a not-for-profit organisation that builds the skills and knowledge of civil society organisations to be more effective in addressing poverty and inequality. Since 1992 INTRAC has provided specialist support in monitoring and evaluation, working with people to develop their own M&E approaches and tools, based on their needs. We encourage appropriate and practical M&E, based on understanding what works in different contexts.

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