Observation Guide

Location: Date: Field Site ID: Start time: End time:

Keywords

External References
Provide a reference or link to any external documentation pertaining to the activity or event. If an email, note the sender, date, and subject. If an announcement, flyer, or other publication, provide a link.

Setting
Describe the setting in which the observations took place. What was the organizational context (e.g. private office, meeting, data center, etc.)? What was the spatial layout and appearance? If writing up first observations in a space, include a diagram.

Participants
Provide a count of the number of participants and, where possible, their names and/or titles and affiliations. Describe the participants' appearance (e.g. phenotype—including racial and gender markers, dress, etc.).

Description of Activity
Describe what happened during the timeframe (not impressions, thoughts, analysis, theories, or concerns).

- Avoid descriptions like, "Eva felt uncomfortable," since I do not know how people feel without further information. A proper description would be, "Eva looked uncomfortable." In such cases, be sure to describe what that means (e.g. "Eva was fidgeting and playing with her pen"). And if I confirmed that feeling with her, I should add what I learned.
- Where possible, draw on specific words, phrases, and summaries of conversations, and highlight insider language. It is important to focus not simply on subject actions, but interactions. So what do interactions between people, places, contexts, etc. look like?
- Include what I did (for example, "I spoke with Eva and others on the conference call; we talked about the upcoming conference")

Impressions/Reflections
How did I feel? What was the experience of being there? Provide a sense of the experience or feel of moment, the kind of thing a strict transcript could never provide – not my analysis of it. What did this context make me think about, how did it make me feel, how do I think it made others feel? Whereas the above section is devoid of impressions, this section should be guided by them. It is not for interpretation or analysis, which is below.

Analytic Notes/Interpretation
If I have any analysis of the observation, this is where I will put it. My analytic notes can move beyond the data/observations and suggest patterns and rough explanations, including making generalizations about how the interaction I saw or experience I had fits into broader social patterns. Also take a moment for reflexivity. How might I have influenced events?

Methodological Notes
What strategies worked well? What went wrong? What could I do differently in the future?

Future Actions
A plan for future lines of inquiry or, depending on what I saw, ideas for future participant observation. Include a proposed timeframe alongside each line, and questions I should ask to answer propositions emerging from my analytic notes. Should I follow up with anyone? Targeted actions/observations?