



Evaluation Resources

Evaluation Process Overview

Story Notetaking Guidelines



IN COOPERATION WITH

SRI International



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for the Intel Education Initiative

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Story Notetaking Guidelines

Basic tips for collecting good observational data in learning environments

- *Advance preparation.* Know everything you can about the situation ahead of time—including the program and curriculum. Also, if you are observing a classroom, know what has been planned for that day. This step will help you fit the pieces of what you're observing together more quickly and will help you document the differences between the plan for the day and what actually happens.
- *See the whole event.* If possible, it's really good to observe a class session or event in its entirety so you understand how the event develops from beginning to end.
- *Make your notes real evidence!* The more you record actual behaviors, the more reliable and rigorous this evidence will be.
 - All your notes should let the reader know **Who, What, When and Where**: what people are involved, what tasks are they are engaged in, and the time and place of the activities you are describing.
 - Keep track of the conversations—including your own—by noting exactly who is speaking and recording direct quotes when possible. (Talking is a type of behavior.)
 - Are there key symbols, words, ideas, that keep coming up and people seem to really care about?
- *Keep your interpretations separate.* Always keep your observations separate from your interpretations. Use two columns (see below) or another method of separating.
- *Be open.* Know what you care about, but don't "know" ahead of time what you will see! Among other things, you will undoubtedly be asking:
 - How does the situation people are in drive people's behaviors? What are the key features of the program that are affecting participants?
 - How do the particular features of the context create change in what people are able to do? How are the changes you see in anyone's behavior linked to program features?
 - What do their products (creations, artifacts) tell you?
 - What are the learning resources? Who helps who? How are materials or tools used? How do people show that they know something?
- *Theoretical position.* You'll be answering the question, "What are people up to here?" The answer depends on what they actually do—what *they* orient to, what *they* think are important categories, what *they* are working on, what *they* respond to, what *they* construct in their social interactions. You are describing how they build their world. You want to capture as much as possible—in rich, thick detail—from the "native" perspective. Think of *activity, space, time, roles, important symbols, artifacts* and other things as your descriptive foundations in this process.

Additional notes for new observers

Practice. Being a site visitor is different than just being observant. If you haven't conducted site visits or observations previously, consider doing some practice observations before going on your site visit. Go to a café or a nearby park, and do an observation. Getting the most out of your limited time at a site means being as prepared as possible. Even if you have done site visits previously, practicing with the given data capture form is probably a good idea.

Better to find out than to assume. Our everyday experience demands of us that we make numerous assumptions. Most of the time our assumptions are probably well founded. Other times we are probably not quite right. We must always challenge the assumptions—try to see and interpret from alternative perspectives.

It's all about them. The site visit is all about participants' experiences. If they think that something is important, it is important for us to understand the issue.

Example from Intel[®] Learn

Intel[®] Learn Program—Pilot Implementation

Observation Guidelines

Purpose. Observations help evaluators see how the program is working for the learners in accomplishing its goals (promoting technology skills, higher-order thinking, collaborative capabilities). Observations should be focused on and help us gather information about such program issues as:

1. use of curriculum materials,
2. staff-learner interactions,
3. learner-learner interactions, and
4. learning outcomes.

During their site visits observers will take free-form notes regarding these issues.

Size of Data Collection:

Purposive sample to as many sites as possible, at least 6-8.

Observation foci. The following questions show the types of questions that can help to guide your observations and discussions with staff and learners. These questions are designed to help you focus your observations, but they are not a complete list of interesting things you might observe.

- **How are staff and learners using the curriculum?** Are learners following the guidelines in the Activity Cards closely? Are they coming up with their own ideas for the products they design? How are other curriculum resources such as the Skills Book being used? What types of resources do the learners draw on during project time? Are learners sufficiently prepared for and supported in successfully completing the projects? Is there evidence for ways in which the curriculum could be improved?
- **How does the staff know what the learners are learning or how they are doing?** Does the staff member have the opportunity to observe the learners closely as they work? Do the learners ask the staff questions? How else does the staff come to know about the learners' capabilities and thinking in order to support their learning? Does the staff have opportunities to comment on the learner work and make suggestions? How does she or he help learners go beyond their current level to develop even further?
- **Do learners work collaboratively and support one another as peers?** Are learners sharing ideas about their work? Are they showing each other things that they have learned how to do? Are they sharing the workload and all contributing during group projects? Do they turn to one another and ask each other questions when they have difficulties? Do they freely move around the room to learn and share with others?
- **How does learner problem solving and creativity come into the sessions?** Are the learners coming up with interesting, novel ideas for their projects? Are they researching community or work-related issues to enhance their products? Do peers and staff notice products that are original and reveal learners' distinct ideas and style?

- **Does the staff have adequate training and support?** What resources for training and support do staff members have available? Do staff members have the resources they need to implement the program? Do they have resources to turn to when they have difficulties? Do levels of training and support for staff help the program match the expectations of the program developers and staff? In what ways could additional training and support improve the program?
- **Other questions about the program that arise during your observations?** No list of observation foci is comprehensive, since many of the most important observations are unexpected by the program designers and evaluators.

Note-taking. For each site visit you make, you will fill out the Observation Notes Cover Sheet, which will provide the necessary background information about the observation (i.e., time, place, participants, computers, session topic, and other relevant data). You will attach your free-form notes to the Cover Sheet as instructed.

The free-form notes you take will include two separate types of information. First, what are the exact behaviors you are observing and conversations you are having (described as accurately and objectively as possible)? Second, what are your thoughts about what you are seeing and hearing? Most of your notes will belong to the first category, but the ideas you generate about what you actually see and hear will be very important, too. The first column can be thought of as the evidence you are collecting, and the second column ends up with your hypotheses about the Intel Learn program. The following table provides an example of how you can record your notes in two columns.

1.1.1.1.1 OBSERVATIONS	REFLECTIONS
15:00 (45 mins. after class began). Class being held at technology center. Learners (10-12 age group) are working on an activity designing postcards that they had begun earlier. They are talking about their designs with one another, sharing interesting ideas they have and giving each other suggestions. The staff is circulating around the class, looking at what the learners are doing.	<i>How much is the staff giving learners feedback on their efforts as she walks around looking at what they are doing? Are they using her as a resource?</i>
One learner raises his hand to ask the staff a question about using WordArt. The staff spends some time with the learner at his computer.	
After a few minutes, several other learners come and listen to what the staff is saying.	<i>When do the learners ask the staff questions—in contrast to asking their peers or looking at their cards? What made this group come to the staff right now?</i>
The staff addresses the whole class and reminds them that the WordArt toolbar appears (to let them edit their WordArt) when they double click on the WordArt text.	
Another learner raises his hand and the staff leaves the small group to talk to this new learner.	<i>Did the learners in the small group have their questions answered? What did they say to each other afterwards?</i>

As soon as possible after your observations, it is important to expand your notes, writing down as many additional details and ideas as you can.