



**Division of Student Life**

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# **GUIDELINES FOR CONDUCTING OBSERVATIONS**

Observations are a powerful method for collecting direct evidence of behaviors, actions, and interactions. They allow staff to document real-world occurrences in authentic settings, providing insights that complement other forms of assessment. This guide offers step-by-step instructions for planning, conducting, and analyzing observations in student affairs. Whether structured with checklists or recorded through detailed field notes, observations help gather meaningful and actionable data to inform program and service improvements.

## ARTICULATE THE PURPOSE OF THE OBSERVATION

Observations are a systematic method of collecting direct evidence of behaviors, actions, or interactions in real-world settings. They help assess how individuals engage with programs, spaces, or initiatives.

### Guidelines:

- Clarify your objectives
  - e.g., assessing behavior change, evaluating utilization of services or spaces
- Define what you intend to observe and why it matters to your assessment goals

### Example:

Purpose statement: To assess the rate of helmet-wearing behavior among moped drivers after a student wellness campaign encouraging helmet use.

## TYPES OF OBSERVATION METHODS

### Structured Observation

- Predetermined checklist or rubric
  - Please view [Guidelines for Developing Rubrics](#) for more detailed information
- Focuses on specific behaviors
- Suitable for counting and categorizing behaviors

### Unstructured Observation

- Open-ended field notes/descriptions
- Captures nuanced, unexpected behavior
- Useful for understanding interactions with spaces or services

### Participant vs. Non-Participant

- Participant: Observer interacts with participants
- Non-Participant: Observer does not interact with participants in any way

### Example:

**Structured:** Use a rubric that records "helmet worn correctly," "helmet worn incorrectly," or "no helmet worn." Or simply use a checklist categorizing moped drivers into two categories: "helmet" or "no helmet".

**Unstructured:** Take open-ended notes about the context surrounding helmet use, such as whether students seemed rushed or distracted when not wearing helmets.

### **Participant vs. Non-Participant:**

**Participant:** Engaging with students at moped parking spaces by initiating casual conversation while observing helmet-wearing behaviors.

**Non-participant:** Standing discreetly near moped parking spaces to tally helmet use without interacting with students.

## PLANNING & STRUCTURING OBSERVATIONS

Effective observations require deliberate preparation to ensure clarity and reliability.

### **Guidelines:**

- Define behaviors: Identify specific actions you intend to observe
- Select an observation method: Structured (checklists/rubrics) or unstructured (field notes)
- Select an observation type: Participant or non-participant
- Develop tools: Create simple, clear checklists or observation templates
- Pilot the observation: Test your method before full implementation

### **Example:**

Create a structured checklist noting whether each moped driver observed is wearing a helmet or not, with a non-participant approach. The observer would stand outside the Iowa Memorial Union with the checklist tallying helmet usage among moped riders between 8-10 am.

## CONDUCTING THE OBSERVATION

### **Guidelines:**

- Eliminate bias: Minimize influence on participants' natural behavior
- Stay focused: Follow your observation tool consistently

- Record data immediately: Capture notes or tallies in real-time
- Note the context: Document environmental factors that may be influencing behavior
  - e.g., time of day, weather, crowd size

**Example:**

While observing moped helmet use, note if specific weather conditions or crowded roads appear to influence whether students wear helmets.

**Sample Moped Observation Template:**

Time	Location	Helmet Worn Correctly	Helmet Worn Incorrectly	No Helmet	Weather/ Environmental Notes
8:00-8:30 AM	IMU Moped Parking	10	2	3	Clear, moderate traffic
8:30-9:00 AM	IMU Moped Parking	8	1	4	Sunny, light traffic
9:00-9:30 AM	...	...	...	...	...
9:30-10:00 AM	...	...	...	...	...

## ANALYZING OBSERVATION DATA

**Guidelines:**

- Organize numeric data (counts, tallies)
- Summarize key patterns and trends
- Identify how behaviors align with or differ from program goals

**Example:**

70% of students wore helmets during morning hours compared to 50% during afternoon hours. This time-based trend could inform future safety interventions.

## ETHICAL CONSIDERATIONS

**Guidelines:**

- Observations in public spaces typically do not require participant consent

- Maintain anonymity and avoid identifying individuals
- Respect privacy and do not observe sensitive personal interactions without permission
- When in doubt, consult the IRB or ethics guidelines

### Example:

When recording helmet usage on public roads, avoid photographing individuals or recording personal identifiers; focus strictly on observable behaviors.

### Sources

Creswell, J. & Poth, C. (2018). *Qualitative Inquiry & Research Design: Choosing among Five Approaches*. 4th ed., SAGE Publications.

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