A Guide to Creating Your Own Note-taking (Observation) Template

It can be very helpful to create your own customized template for recording and organizing observations. Here are several tips about good observations that can be incorporated into your observation template:

- Know the purpose of the observations while being open to the possibility you may observe something previously unseen and therefore useful.
- Record observations in an organized way so you can return to your notes and make sense of them.
- Label all notes for future reference while keeping the observations confidential.

Use these steps to develop an observation or note-taking/note-making form that will meet your action research purposes while leaving room for possibilities and surprises.

Step 1 – Determining Goals for the Observation

- Who do you plan on observing? Why? (All students? Some students? Why these students?)
- When do you plan on observing? Why have you chosen this time?
- Will you be able to sit back and observe or will you be actively teaching/monitoring while doing the observation?
- What is the purpose of this observation? (What do you hope to learn? What questions do you have that you hope to have answered? Do you have hunches you wish to confirm?)
- How and why is this information important to your research study?
Step 2 – Revise Your Purpose Statement(s)

Reread your purpose statement(s) for the observation. Is this clear? Does it connect with the other answers?

Ineffective purpose statement:

To observe how children engage during hands-on mathematics activities.

Effective purpose statement:

To observe the different ways children are using specific kinds of manipulatives during problem-solving activities.

Reread your answer to “How and why is this information important to your research study?”

Have you been specific here about your intentions?

Ineffective statement:

This will allow me to triangulate the data. (Great, but how? Just doing an observation for observation’s sake won’t move the project forward!)

Effective statement:

I have assessment data (individual written problem-solving activities) that suggest children are rushing to an “answer” but not thinking through the process of finding a mathematical solution. We allow adequate time for children to use manipulatives to process and explore possible ways of solving a problem. How are they using this time? How are they using the manipulatives? Do they need more teaching in this area? The observation data will hopefully inform our practice and help us analyze the assessment data.

Now return to the question “Will you be able to sit back and observe or will you be actively teaching/monitoring while doing the observation?” Will you be able to get the data you need while actively teaching or do you need to solicit the assistance of your mentor teacher, a parent

Becoming a Teacher Through Action Research, Second Edition © 2010 Routledge / Taylor & Francis Group, LLC.
Step 3 – Deciding What to Record and How to Record it

- **Articulate clearly what you want to observe and record.** For example, do you want to listen to what students are saying? How they are asking questions, how they respond to one another, how they are processing? Do you want to watch how they use tools, what they do with their bodies as they think, how they begin an activity, etc? Be very specific in describing what behaviors you want to record and make sure these are related to your purpose.

- **What will be the best way to record this data?** How you record data often depends on what else you are doing during the observation. If you plan to be actively monitoring students’ progress, for example, choose a method that is easy to use in this situation.

*Some options include:*

  - blank sheets of paper divided in the middle (one side for observation; one side for analysis);
  - blank sheets of paper divided into quadrants – this works well when observing four different groups;
  - blank sheets of paper with table groups or seating charts drawn prior to the observation;
  - sticky notes that can later be arranged into categories by situations or to represent a progression;
  - a chart with the students’ names you wish to observe in the left column; a large center column for observations; and a third column where you can later analyze your observations.
• Create a note-taking template that will allow space for you to analyze the data later.

Also consider the use of the following to assist you in your observations:

• Digital recorders used by students or placed in the center of a cooperative group;
• A video camera;
• A digital camera (snap shots as you teach/monitor/observe)

Step 4 – Creating the Note-taking/Observation Template

• Create the note-taking/observation template.
• Share it with your critical colleague and mentor teacher: do they have suggestions?
• Try it out – be willing to modify as necessary.
• Make sure that every note-taking/observation template is dated and labeled. Such documentation is critical to the credibility and accuracy of your research.

Step 5 – Analyzing the Data

When analyzing observational data, look for common recurrences, note unique situations or occurrences, ask critical questions, make connections (within the data, to other data, the literature of distant colleagues).

Here are some possibilities:

• If using sticky notes, arrange in different kinds of groupings (don’t settle for just one);
• If you have one-sided notes, cut them apart and arrange in different kinds of groupings;
• Color-code similar occurrences or color-code according to themes from distant colleagues;
• Draw arrows to connect occurrences. Use fractured lines and arrows as well.

• Write an immediate response to the observation (do this the same day as the observation!) Write everything you remember, your wonderings, and your questions, even if they don’t seem to necessarily “fit” or “relate” at the time. Later, they may!