Learning to Observe

Ely (1991) quotes one of her students: "Well, thank heavens! I've finally come to an easy part in this. Participant observation is a snap," and continues, "Well, it isn't... an attitude of curiosity and a heightened attention are required in order to attend to those very details that most of us filter out automatically in day-to-day life" (p. 42). Spradley (1980) delineates six "dos" that distinguish the participant observer from a participant:

1. Watch yourself as well as watching others.
2. Try to become explicitly aware of what others take for granted.
3. Look beyond the immediate focus of your activity—use a "wide-angle lens."
4. Try to experience the situation simultaneously both as an insider and outsider.
5. Be introspective as you watch.
6. Keep a record not only of what you see but also of how you experience the situation, and mark the latter in such a way that you can separate what you see occurring from how you experience it.

The last of these is important because later you may experience the same events quite differently and change your interpretation. You must then sort out the more appropriate interpretation or determine what caused the difference.

It is important to remember that no matter how unobtrusive you try to remain, your merely having entered the situation may have changed it. Ely (1991) notes an instance in which a teacher-friend who had invited the observer into his classroom became increasingly defensive and argumentative. Discussing this situation with other student researchers, one of them remarked: "That is because you have introduced the reflective mode into that room. No matter how unobtrusive and non-judgmental your presence it is heightening his own awareness of what he is doing" (emphasis added, p. 196). Few are entirely comfortable with their performances and when they become reflective they are likely to become defensive.

Most observers start at the same place, a first phase of trying to find what is significant in a situation. In that initial stage, the researcher is like a sponge, soaking up all that is around and listening intently. Interviewing is open-ended, and sometimes just observing is best. Starting with a broad focus can be very confusing to the newcomer—there is so much to attend to! One of Ely's (1991) students, Belén Matías, observing in a classroom put this very well: "There are so many
things going on at the same time! My head is spinning. What should I write in my log? What should I leave out? And to top it all, . . . the minute I write . . . I’m disconnected from what’s happening. . . . If I’m the instrument, I need to be sent to the repair shop” (p. 48).

Before you despair, just jot down as much as you can. Even things that don’t seem significant at first, may later turn out to be important. Gradually, it will become apparent what is relevant, and what your focus will be. This is not to say that the whole process is automatic; you will have to think about what you have observed in the time between observations. Try to understand what is happening, and what is significant about it for your purposes. As you work at that, (and it does take work!) you will find yourself more interested in certain aspects than others and from those the focus will emerge. Here is an example, again from one of Ely’s students, Marcia Kropf: “As I reread my log entries each week, it became increasingly clear that, because . . . of my own fascination with people, my topic had changed! I no longer noted, in explicit detail, the computer programming functions being explored and how students gained insight into how they worked. Instead, I was describing in great detail when students came to class, how they behaved when they entered the room, where they stood, what they said and to whom, and how they were greeted. . . . I did not develop insights into how students learn computer programming. . . . I did, however, learn a great deal about how students can be invited to participate in a class” (p. 55).

Observers tend to focus on the actions and interactions. However, things such as physical locations, what is present in the room, who is present and how they relate to one another, the sequence of actions, the inferred intent of their actions and their feelings about them are all things you should try to get into your observation notes. You can include a map of the situation; this serves both to help you find the best situation for observation and to locate individuals and objects in space for later reference.

Whyte (1993) notes that we must “learn when to question and when not to question as well as what questions to ask” (p. 303). For example, conversation stopped when Whyte remarked to a gambler, who was telling the group about his operations, “I suppose the cops were all paid off?” His friend Doc commented the next day that he should go easy on all the who, what, why, and when stuff or people would clam up. If he’d just hang around long enough, he would learn the answers without asking. Whyte declares: “I found this was true. As I sat and listened, I learned the answers to questions that I would not even have had the sense to ask” (p. 303). Apropos of the same point is this beautiful quotation from Huxley (1982, as found in Worthen and Sanders, 1987):

The best way to find things out is not to ask questions at all. If you fire off a question, it is like firing off a gun—bang it goes, and everything takes flight and runs for shelter. But if you sit quite still and pretend not to be looking, all the little facts will come and peek round your feet, situations will venture forth from thicket and intentions will creep out and sun themselves on a stone: and if you are very patient, you will see and understand a great deal more than a man with a gun does.
Over the course of a study, researchers will consult a variety of documents (transcripts and minutes of meetings, court proceedings, diaries, letters, questionnaire responses, census statistics, photos and so forth). They also look for artifacts (pieces of art, choices of furniture, items on desks or tables, available equipment). In short, they will seek any evidence that will be helpful in extending and deepening their understanding.

Sadler (1981), in an article discussing the mind’s cognitive limitations as they affect qualitative data gathering, notes that there is a long history of efforts to identify the sources of distortion that cause the mind to make errors of judgment and inference. He observes that after these have been the subject of considerable research, certain cognitive limitations have come to be recognized. He lists a number of research-supported “information processing limitations,” of which two critical ones are listed below. Knowing these limitations is the first step toward disciplining their effect.

- **Data overload.** Research suggests that most individuals are able to keep only about seven things in their mind at one time. The mind can beat this limit by “chunking” things as we routinely do—we don’t see four legs and a top; we see a table. When many aspects of a situation must be considered at once, however, observers may be fooling themselves in thinking that they are attending to more of the information than they really are. When others are also observing, comparing perceptions may help identify overload situations.

- **First impressions.** We commonly know that first impressions are important, but it has also been confirmed in research. Research on first impressions with regard to physical stimuli where individuals must estimate size indicates that they are affected by the first stimuli they receive. First impressions tend to be enduring, perhaps because new information constitutes a progressively smaller proportion of the information base: after a first piece, the second piece constitutes only half our knowledge base; the next similar addition increases the base only 33 percent, the next 25 percent, then 20 percent, and so on. Because information received later is a smaller part of the base, it becomes more difficult for a new piece to markedly affect the whole. If we are aware of this problem, later efforts to separate out and then verify early impressions become important.

As you may have already sensed, the role of the participant observer is a complex one. As Metz (1983) puts it, participant observers must be:

constantly "on," defining themselves, guarding against misinterpretation, judging ambiguous situations, and forming an emergent agenda. Also they must be ingratiating themselves with others and appearing to interact spontaneously so that participants are not inhibited by their presence, while they, in fact, reserve their own feelings and use occasions and relationships others treat as ends in themselves, for their own instrumental purposes. They are always in the situation or relationship, but not of it. And even when their spontaneous emotions do arise and they develop feelings of affection and loyalty, they must hold these feelings at bay as sources of bias. (pp. 405-406)
CHAPTER 12: Fieldwork and Observation

All the while, participant observers must simultaneously be filing away for later recall the significant events, actions, statements, and other details that will make up the database for one’s study. Juggling the multiple tasks of observing is difficult, but the fact that many researchers have successfully mastered this art and constructed fascinating and insightful studies should be encouraging to novices.

Because observation is so complex, the neophyte may easily be swamped by trying to monitor all aspects of an observer performance from the very beginning. As Winne (1995) indicates, for novices to monitor their own thoughts and behavior reduces the mental resources available to observe and select significant aspects from the situation they are observing. (Remember, most of us can handle only about seven things at a time.) As the student becomes more comfortable in the observing situation, attending and noting become routinized and resources are freed for self-monitoring—examining one’s own behavior for the kinds of relational and bias problems mentioned in the preceding paragraphs. The novice should probably build up a repertoire of observation behaviors gradually, aiming to add more of the complete set of desirable observer behaviors with each session. It is not clear how transferable that repertoire and adjustment are from situation to situation or whether some adjustment is required in each new situation. Transferability probably varies with both the nature of the situation and the skills of the observer, but it appears that for many observers there may be a period of adjustment in each new situation.

✦ Gradually build up a repertoire of observation skills.
✦ Observe and record what you are doing and thinking as you observe others.
✦ Try to keep everything in a larger perspective as an outsider would. At the same time, empathically try to sense how those in the situation are experiencing it.
✦ Learn when to question.
✦ Be aware of data overload.
✦ Double-check first impressions.