

The Developmental Evaluation Toolkit

THE SEMI-STRUCTURED OBSERVATION GUIDE

An important role of the developmental evaluator is to help surface issues that could quickly become problems if not resolved, or become lost opportunities if not raised. You can also go much deeper, helping untangle issues that are already known, but difficult for participants to manage, identify pathways to success and even resolve conflicting perspectives or information.

To do any of these, you need to stay on top of the action. There are many ways to do this, but one useful tool for keeping abreast of the action is through semi-structured observations.

Design: The Semi-Structured Observation Guide is designed to give structure to an evaluator's observation of key events, regular meetings, or other gatherings where information about the process can be observed. Observations are a critical component of developmental evaluation and typically happen frequently.

This guide has a set of categories of information to observe – please adapt them to match your setting, including identifying frameworks to leverage that match the issues you've identified. Specifically:

1. Consider whether the meeting you're observing has a series of defined agenda items or other activities. If not, the approach to documenting the meeting will need to be simplified to reflect one overarching purpose.
2. Consider what issues you are interested in observing. You may want to look at your evaluation questions, notes about barriers/opportunities, analysis of 1-on-1 Conversations and Right Now surveys, or the frameworks you've identified that can help you to understand what you are seeing. Fill in the key issues to observe table with reminders to yourself about what you want to make sure not to miss.

It is a good idea to take rough notes in a meeting and then type them up and add more thoughts shortly after the meeting, with a rough deadline of within 24 hours so that your memory doesn't play tricks on you.

Analyzing the Data: To prepare for analysis, transfer your notes into an Excel sheet (template available at the website listed below) or a qualitative analysis software program. When using an Excel sheet, the columns represent the meetings and the rows represent the types of data you're collecting in the observation. Excel is one of the most efficient methods of aggregating this data, so the observation protocol itself is set up to easily copy and paste into Excel.

The analysis of observation notes happens in multiple ways. In the short-term, you can review the notes to look for evaluation questions to surface, issues that might be worth further investigation, or data that helps you answer the evaluation questions you're currently investigating. Depending on the purpose of the data, you may analyze it formally in qualitative analysis software or informally by capturing key themes in your ongoing notes. In the longer-term, you may return to

Are you interested in more tips and tools for developmental evaluation?

Spark Policy Institute's (www.sparkpolicy.com) interactive Developmental Evaluation Toolkit is available at www.sparkpolicy.com/DEtoolkit. Please join us and share your stories about developmental evaluation, share your tools, and access the tools and ideas from other evaluators.



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your observation notes to see if there are any patterns around issues that keep coming up, any information about how decisions in general are being made or how a specific decision was made, or other trends in the data. You may want to analyze this more formally, making sure to be systematic in coding and theming to limit how much of your own bias you introduce to the analysis.

Once you have your results, you may decide that an issue surfaced needs more investigation through interviews, observation, etc. Often, you can share the results back with the group using a facilitated learning dialogue focused on taking action in response to the learning.

Are you interested in more tips and tools for developmental evaluation?

Spark Policy Institute's (www.sparkpolicy.com) interactive Developmental Evaluation Toolkit is available at www.sparkpolicy.com/DEtoolkit. Please join us and share your stories about developmental evaluation, share your tools, and access the tools and ideas from other evaluators.



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SEMI-STRUCTURED OBSERVATION TOOL

LOGISTICS

Evaluator Name:	
Event Name:	
Event Date/Time:	
Event Participants:	

NOTES ON AGENDA/OUTCOMES

Agenda Item 1	Intended outcomes	
	Observed outcomes	
	Notes on process & interactions	
Agenda Item 2	Intended outcomes	
	Observed outcomes	
	Notes on process & interactions	
Agenda Item 3	Intended outcomes	
	Observed outcomes	
	Notes on process & interactions	



Agenda Item 4	Intended outcomes	
	Observed outcomes	
	Notes on process & interactions	

DYNAMICS AND ISSUES TO OBSERVE

[insert key issues to observe]	

PARTICIPANT GENERATED EVALUATION QUESTIONS

Question	Person posing question	Context

OTHER NOTES

Other Note 1:	
Other Note 2:	
Other Note 3:	