This protocol records actions of a group of participants engaging in a particular activity, and also helps characterize the different components of that activity.

Before you observe:
- **Review all instructions and the protocol itself.** It is a good idea to complete one or two practice protocols, if possible, to familiarize yourself with the process and develop your own note-taking strategy (e.g. what abbreviations you want to use).

- It is a good idea to have multiple observers, if possible. If you have multiple observers, *establish inter-rater reliability* by completing practice observations during the same activity, then comparing your notes and coding and discussing your observations.

- **Decide how you will determine observation periods.** During a single session, you should observe multiple segments. For this protocol, you can switch at new sequential segments (change in activity, e.g. moving from a facilitator lecture/introduction to a hands-on activity) or predetermined time periods. This helps to keep your observation sheets more organized and allows you to retain more detail in your field notes. Use this guide to determine time periods:

<table>
<thead>
<tr>
<th>Length of session</th>
<th>Divide into...</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 60 minutes</td>
<td>Equal segments of 3</td>
<td>45 min: 15 min/observation 20 min: 6 min/observation</td>
</tr>
<tr>
<td>60-119 minutes</td>
<td>10 minute segments</td>
<td>60 min: 6 segments 90 min: 9 segments</td>
</tr>
<tr>
<td>120 minutes or more</td>
<td>20 minute segments</td>
<td>120 min: 6 segments 180 min: 9 segments</td>
</tr>
</tbody>
</table>

- **Gather your materials.** Make sure you have a non-smudging pen, and enough copies of the protocol to complete the observation segments that you select using the table above. A clipboard, watch, and paper or binder clips to keep copies together are also useful tools.

Completing the observations:
- **Introduce yourself.** Whenever possible, introduce yourself to the group and tell them what you are doing. If learners are of an appropriate age, you can offer to let them see your notes. Here is a sample script you can customize for your observations:

  Hi! My name is _____ and I am from ______. Thanks for letting me join your group today. I am going to be taking some notes on the activities you’re doing, which we hope will help make the activity even better in the future. If
you are interested in knowing more, or seeing what I am writing down, come talk to me anytime. Otherwise, I will stay out of your way. I look forward to a fun activity today!

• **Begin your observations.** Take detailed notes focusing on the actions of the group. Get as close to your focal participant as you can without being disruptive. Frequent time stamps are extremely useful!
  - **Tip:** you may emphasize different things during your observation. For example, you may be looking for participants to use a specific science tool, or you may be very interested in the questions they ask their peers. This is determined by your evaluation questions.
  - **Tip:** See the sample field note and sample completed protocol available on activationlab.org/toolkit for examples of detailed field notes.

• **Switch to new observation sheets until you have reached your target number of observations.** By getting as large a number of observations as possible, you will see a variety of actions that will be representative of possible learner outcomes during the activity.

**Coding your observations:**

• **Complete the observation protocol.** It’s a good idea to do this as soon as you can so that you remember details from your notes. Review your field notes and first write a summary of the activity and/or observation period on the second sheet of the protocol. Then, complete the individual sections, adding detail from your field notes as applicable.

• **Debrief with your colleagues.** Consider setting up a debrief meeting to discuss your observations, such as your impressions, key takeaways, etc. This can be helpful step in determining analysis and reporting priorities.

**Analyzing your observations:**

Analysis options will depend on a variety of factors, such as the number of observations you complete, your evaluation questions, and/or the specific type of information you were looking for during your observations. Some options could include:

• If you have a large number of observations, you can count up the instances (e.g., how often did engagement with the facilitator occur across different tasks?)
• If you tracked quotes, you could compile them and identify themes
• If you used the Engagement survey, you could compare self-reported learner engagement with your observed engagement (note this will only work on a group level and not matched up with individual participants, since your observations will be at the group level and your surveys will be anonymous)
• If you are working on an activity that is not your own—i.e., you are an external evaluator—the protocol can help you characterize the types of actions that happen within an activity. These can be summarized to identify themes in qualitative analysis and reporting