

Making Empathy Practical

Observations: Seeing Beyond the Surface

Observation is a powerful method that involves systematically watching people in their natural environments to uncover what they actually do rather than what they say they do. This structured approach to witnessing behaviors, interactions, and contextual factors reveals insights that often remain hidden in conversations alone.

Goal

This tool helps education and nonprofit leaders capture authentic behaviors, identify unspoken pain points, discover creative workarounds, and understand the contextual factors that influence stakeholder experiences in ways they may not be able to articulate themselves.

Advice

- Start with a broad view before focusing on specific details
- Observe multiple times across different days and circumstances
- Document immediately—don't trust your memory
- Clearly distinguish between observations (what you saw) and interpretations (what you think it means)
- Practice "beginner's mind" by suspending assumptions and seeing with fresh eyes
- Look for contradictions between what people say and what they actually do
- Always obtain informed consent and consider how your presence affects behavior



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What It Is

Observation involves systematically watching people in relevant environments to understand behaviors, interactions, and contextual factors that influence their experiences. This method captures what people actually do, which often differs from what they say they do.

When to Use It

- When understanding the context and environment is crucial
- To identify pain points that participants may not articulate
- To discover workarounds and adaptations that reveal unmet needs
- When behaviors and interactions matter more than opinions
- To complement self-reported data from interviews or surveys

Process

Before the Observation

1. **Define your focus:** Identify specific behaviors, interactions, or processes to observe.
2. **Gain appropriate permission:** Ensure all ethical and organizational approvals are in place.
3. **Create an observation guide:** List what to look for, including:
 - Physical environment details
 - Participant behaviors and actions
 - Interactions between people
 - Expressions of emotion or frustration
 - Workflow sequences and timing
4. **Prepare note-taking templates:** Structure your documentation to capture consistent information.
5. **Consider your role:** Decide if you'll be a passive observer or participant-observer.

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Process, cont'd

During the Observation

1. **Position yourself thoughtfully:** Be present but minimally disruptive.
2. **Document systematically:** Record:
 - Factual observations (what you see and hear)
 - Contextual factors (time, place, circumstances)
 - Direct quotes when possible
 - Non-verbal cues and body language
 - Your initial interpretations (clearly marked as such)
3. **Notice patterns and variations:** Pay attention to:
 - Typical vs. atypical situations
 - Points of friction or hesitation
 - Workarounds and adaptations
 - Emotional responses
4. **Use multiple recording methods when appropriate:**
 - Written notes
 - Photography (with permission)
 - Audio recording (with permission)
 - Sketches or maps of the environment

After the Observation

1. Expand your notes immediately after observing while memories are fresh.
2. Identify themes and patterns across multiple observations.
3. Formulate questions for follow-up interviews or other research.
4. Distinguish observations from interpretations in your analysis.
5. Share findings with stakeholders to validate your understanding.

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Tips for Success

- **Map movement patterns:** Track and diagram how people navigate physical or digital spaces over time.
- **Use time sampling:** Observe the same activity at different times of day/week to identify variations in behavior.
- **Employ paired observations:** Have two observers record the same events and compare notes to reduce individual bias.
- **Capture environmental factors:** Document lighting, noise levels, and other contextual elements that might influence behavior.
- **Try shadowing:** Follow a specific individual through their entire process or day for comprehensive understanding.
- **Count frequencies:** Tally specific behaviors to quantify patterns (e.g., how often a feature is used or avoided).
- **Create behavior maps:** Use floor plans or diagrams to mark where specific activities or interactions occur.

Ethical Considerations

- Always obtain informed consent from those being observed.
- Respect privacy and confidentiality in your documentation.
- Be mindful of power dynamics when observing vulnerable populations.
- Consider how your presence might affect behavior and account for this in your analysis.
- Share relevant findings with those you've observed when appropriate.

Analysis Questions

- What patterns emerged across multiple observations?
- Where did people struggle or express frustration?
- What workarounds or adaptations did people create?
- How did the environment support or hinder the activities observed?
- What unspoken rules or norms seemed to be operating?