Checklist: Conducting an Observation

Directions: Use this checklist to keep track of your activities as you prepare for and conduct an observation. You can indicate whether you have completed a particular activity by placing an X in the left-hand column. You can also record your notes at the bottom of the checklist.

Done	Activity
☐	1. *Arrive early.* Give yourself time to get prepared.
☐	2. *Review your planning notes.* Remind yourself about what you're looking for and how you will record your observations.
☐	3. *Introduce yourself.* If you have asked for permission to observe a setting (such as a class or a day-care center), introduce yourself before you begin your observation. Use your introduction as an opportunity to obtain signatures on consent forms if you need them.
☐	4. *Set up your recording equipment.* You'll certainly want to make sure you've got a notepad and pens or pencils. You might also have an audio or video recorder, a laptop computer, or a handheld, such as a Palm or Pocket PC. Test whatever you've brought with you to make sure it's working properly.
☐	5. *Take notes.* Take notes during your observation even if you're using an audio or video recorder. Noting your impressions and ideas while conducting an observation can help you keep track of critical events. In addition, if your recorder doesn't work as expected, a set of notes can mean the difference between salvaging something from the observation and having to do it all over again. If you find yourself in a situation where you can't take notes. – such as at a swimming lesson, when you're involved in the lesson – try to write down your thoughts about what you've observed immediately after the session.
☐	6. *Leave contact information and send thank-you notes.* If you have asked someone for permission to observe the setting, give the person a way to contact you, and send a thank-you note after you have completed the observation.

Notes: