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Observational Methodologies in Education: Analysis of Interactions

BY

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Abstract

Observation is an inventive approach aimed at exploring a particular phenomenon in order to describe it as faithfully as possible and to understand it. It means paying attention to a specific event and gathering information about it, even as it emerges as a crucial component of both the educational process and scientific inquiry. It allows educators and researchers to gain insights into phenomena, behaviours, and contexts, enabling an in-depth understanding of the dynamic interactions at play. The distinction between merely looking and actively observing underscores the importance of a thoughtful, open-minded approach that prioritizes objective data gathering while remaining conscious of personal biases. In this paper, various observation methods were explained such as: inductive, subjective, and deductive. The choice of the appropriate approach which is based on the specific context and objectives is essential for meaningful analysis. Besides, effective planning and execution of observational practices are paramount to ensure data accuracy and relevance. By defining clear objectives, selecting suitable methodologies, and acknowledging potential pitfalls, practitioners can enhance the quality of their observations. Ultimately, fostering a robust analytical mindset and embracing the complexities of human behaviour will not only enrich educational environments but also advance knowledge across diverse fields of study. Through careful observation, one can better understand the intricate tapestry of learning and interaction, paving the way for informed interventions and deeper connections within educational spaces.

Keywords: observational methodology, planning, research, observer, observing, teaching.

Introduction

Observation is a form of detection aimed at exploring a particular phenomenon in order to describe it as faithfully as possible and to understand it. It means paying attention to a specific event and gathering information about it (Sanjurjo, et. al., 2021). Thus, it configures as a cognitive process, as it is not only oriented towards reading a phenomenon/situation but especially towards understanding it. It means highlighting certain characteristics related to a thing, person, or situation by relating them to other things, people, or situations within a context, embedded in an environment – in other words, "situated" in a well-defined space-time dimension. It also involves recording all the aforementioned information as objectively as possible. Furthermore, observation is a fundamental moment in the scientific research process because it constitutes the initial phase of the experimental procedure. In fact, the careful and controlled observation of phenomena initiates the path leading to the formulation of hypotheses. Using the same systematic observation procedure, the validity of these hypotheses is then experimentally verified. Over time, observation has also become an essential prerequisite in the social and human sciences. For instance, when appreciating a painting, one might initially notice the dominant colors and shapes, but upon closer examination, the subtleties of light and shadow, as well as the intricate details in the background, become apparent (Formisano,2019). During this process, the researcher describes the

situation, the behaviour of the observed subject, and the context in which they observe. Designing educational interventions, implementing them through strategies, verifying the work done, and redesigning by setting new goals while "adjusting course": these are the actions of the educator, complicated yet also interesting, by the awareness that the material being worked with is not inert but has its own life, its own thoughts, and a decision-making capacity. Observation, therefore, constitutes one of the foundational cornerstones of the professionalism of those working in the educational field. It is not a simple, pre-packaged tool that can be chosen for use or replaced with a more appropriate one: it consists of a set of attitudes, methodologies, and tools that must be internalized in order to acquire a foundational mindset. It must indeed become an integral part of one's professional behavior, constituting a fundamental element of educational competence.

Comparing paradigms

Highlighting the differences between "looking" and "observing" has helped to understand that being a good observer is not a given. A good observer, clearly aware of the objective of their cognitive activity and their frame of reference, approaches the reality to be observed with an open mind, receptivity to data, and the ability to refrain from prejudice, thereby avoiding allowing their value references and preconceived ideas to become the sole measuring stick for the entire reality. A good observer does not take anything for granted and considers even what might seem obvious and irrelevant at first glance, skillfully trying to capture not only global dimensions but also the details that characterize different situations. A skilled observer is aware that observation concerns not only visible facts and events but also their absence; therefore, they do not stop at the appearance of things but "look beyond" (Umoh, 2024, p.362). An attentive observer does not settle for observing phenomena in their individuality and peculiarity but seeks to grasp the global and dynamic aspect of situations, highlighting antecedents, consequences, correlations, which are fundamental aspects in observing educational situations. A competent observer does not limit themselves to detecting data but tries to provide an interpretation of what they see: this operation, which may seemingly appear subjective and devoid of scientific foundation, is instead an essential and conclusive part of the observation process when conducted methodologically correctly. Some types and tools of observation may seem too specific and distant from the usual educational practice that a teacher encounters. However, it is inconceivable to conduct observation in a professional setting without referring to a theoretical paradigm, as there is a privileged model for every objective, each using specific techniques and methodologies. Therefore, their knowledge is deemed indispensable in the field of educational observation, as it does not constitute an attitude in itself, but rather arises from theoretical reflection and critical evaluation. This segment will describe the different types of observation – inductive, subjective, and deductive – and then move on to the fundamental decisions to undertake when preparing for an observational procedure. It will conclude with a brief discussion of the errors that could affect it.

Types of Observation

The observational method has very ancient origins. As early as the 18th century, scholars such as Darwin, Pestalozzi, and Tiedemann practiced naturalistic observation, also known as "field" observation, to conduct their studies. In this type of observation, the researcher does not interfere but merely describes and analytically records information. Therefore, no control is exercised over the subject or phenomenon, which are observed in a natural environment. With the advent of behaviorists around the 1930s, this observational methodology underwent a sharp interruption in favor of experimental observation conducted in laboratories. This is also referred to as observation under controlled conditions because the researcher imposes a certain degree of control. It wasn't until the late 1950s, influenced by ethological studies, that there was a revival and reuse of direct observation in natural situations. The reasons for this are undoubtedly linked to a reconsideration of the importance of the social context in which behaviours occur. These behaviours are no longer understood merely as reactions to stimuli but as intentional actions by the subject, strongly tied to the context. Moreover, during those years, there was also a shift in the purposes of observation in educational settings. Initially, the aim was to evaluate the effectiveness of the educator by observing the causal relationship between behaviours introduced by teachers and the results achieved by students. Later, the attention shifted to the effectiveness of the teaching/learning process, making the teacher/student relationship the subject of observation. Additionally, during those years, there was an evolution of tools and techniques for data recording. From the brief overview above, it is clear that the observational methodologies that have followed over time and continue to be used in various fields are diverse. If one aims to classify them, three parameters can be referenced to differentiate them:

- The environment in which observation can be conducted;
- The role of the observer during the observational moment;
- The degree of structuring of the observation.

Considering the environment variable, we can highlight two main observation models: observation conducted "in the field," in a natural environment, and observation conducted in an artificial environment, also known as "under controlled conditions". The term "field observation," or naturalistic orientation, refers to detection carried out in a real, everyday situation where behaviour occurs spontaneously (Movludpouri; Islami & Afani, 2023). In this context, the observer strives to avoid influencing the observed context with their presence, trying to record facts as they present themselves without exercising any form of control over the object of observation and avoiding interpretative readings. An observational paradigm with a naturalistic orientation is ethology. Speaking of observation under controlled conditions means referring to a type of detection where control is applied regarding the situation and/or behaviour to be observed. In this case, the goal is not merely to describe a situation, but the observation is guided by a system of cognitive and operational hypotheses that condition

the choice of objectives and procedures. Essentially, when carrying out controlled observations, it is necessary to specifically define some parameters:

- The object of observation: what to observe;
- The procedures and tools: how to observe;
- The timing: when to observe and how frequently.

Considering the different levels of involvement that the observer actively engages in during the observation, there are different operational procedures commonly known as "participatory observation" and "non-participatory observation" (Umoh, 2024). What characterizes each paradigm is not only the observer's role, as suggested by the name but also the fact that the observed subjects know they are, in fact, the object of detection. When we speak of participatory observation, we refer to the fact that, during the gathering of information, the observer actively participates in the situation taking place, integrated into the group, engaging in interactions with the observed subjects in a dynamic dimension that involves them directly. Generally, in this type of observation, there is an agreement between observers and observed in sharing a common frame of reference. The objective could, for instance, be the understanding of the educational situation from the inside, in a context that involves the accompaniment of observers alongside the protagonists, in a constant comparison of perspectives. Typically, this type of observation occurs within school settings, involving the joint participation of researchers and teachers. In contrast, the term "non-participatory observation" usually designates a type of detection in which the observer tries to influence the observed context as little as possible, maintaining an external position and not interacting with it. There are specific techniques to enable this “external gaze”; examples include one-way mirrors or automatic recording tools such as video cameras or recorders. If one wishes to conduct this type of exploration while maintaining their presence in the observed context, it is advisable for the observer to adopt strategies to avoid being perceived as such by the involved subjects. They could, for example, integrate into the environment by gradually getting accepted into the group, obviously not revealing their role as an observer, starting data recording only when they are confident their presence does not disturb or influence the normal interactions among the individuals. This system works particularly well in the observation of children, who, after an initial phase of curiosity about a stranger, often ignore them, continuing their usual activities normally. Considering the degree of structuring of the observation, we distinguish "structured observation" from "low-structured observation." The former, also known as "systematic," has a well-defined objective established beforehand. It is conducted on subjects designated in advance and requires the prior preparation of a planned system of data collection and classification, which subsequently allows for the application of statistical techniques to analyze the collected data. The information is immediately recorded by the observer, immersed and engaged in the situation, and cataloged with the help of specially prepared grids, which define the categories of behaviour analyzed in their specificity. Thus, conducting systematic observation means focusing on the behavior actually exhibited in a specific situation, accurately recording the sought-after information; it means operating concurrently with the unfolding of events, striving to grasp the dynamics within the considered context. For an observation to be deemed "systematic," it must necessarily have the following characteristics:

- Relevance: one must ask if what we are about to observe is relevant to achieving the objective, we have set;
- Validity: we must ask ourselves whether the indicators we have highlighted as meaningful are truly representative of the variable we are investigating;
- Reliability: one must verify the level of agreement between different observers, asking if the observation of the same situation, conducted by different people or by the same person at different times, yields similar results;
- Transferability: This indicates the possibility of generalizing and transferring results.

This type of observation is based on what scholars define as quantitative methods, while conversely, a "destructured" observation is of a qualitative nature and focuses more on analyzing attitudes, perceptions, and beliefs of the observed subjects, prioritizing lived experiences over behaviour. Therefore, this type of analysis delves deeper, entering the territory of lived experiences. The description made by the observer of the collected material will have the characteristics of narrative, of storytelling; presumably, the data collected will primarily be qualitative. This observational mode is characterized by the ability to gather a significant amount of data that will be classified and coded later using appropriate methods. It should be noted that often destructured observation is used with exploratory purposes for collecting information on the field to precisely define hypotheses for a more structured research plan. Keeping in mind the variables described above, we will briefly illustrate three of the most commonly used approaches in the educational field among the existing ones: inductive, subjective, and deductive observation. Inductive observation is exemplified by the ethological model. Ethology, also known as naturalistic observation, originated as a science dedicated to studying animal behaviour and its evolution. Its aim is to shed light on behaviour patterns that are innate, genetically determined, and characteristic of all beings belonging to a particular species. The method developed by Konrad Lorenz and Niko Tinbergen was later extended to the analysis of human behaviour, particularly child behaviour, and utilized mainly by developmental psychology. The fundamental principles on which the ethological approach is based can be summarized as follows:

- The subject must be observed in their natural living environment, without using detection tools that could alter spontaneous behavior;
- The observer must not interfere with the observed situation; otherwise, they might influence the spontaneous manifestation of behaviour. Useful techniques and precautions to avoid this include using automatic detection tools, such as cameras and recorders,

or ensuring that the role of the observer is filled by someone familiar with the environment, for example, the teacher in a classroom, so that their presence is not perceived as foreign;

- The description of the observed behaviours must be carried out as precisely, detailed, and objectively as possible, avoiding expressing evaluative opinions or personal interpretations that might alter the understanding of the phenomenon. The final goal of such detection is the construction of the ethogram, which is a repertoire, an analytical catalogue, of behavioral models specific to the observed subject or animal. The use of the ethological paradigm is very functional in studying child psychology because it enables one to verify when certain behavioural patterns manifest, such as social smiling, interaction with others, etc. The primary tools used for data collection are dictation to recorders, video recording, and the use of behaviour checklists. The advantage is undoubtedly that one can conduct a complete, accurate, and analytical observation in a natural environment, but one must also bear in mind that even the detailed and meticulous description of a phenomenon can be affected by elements of subjectivity, as each person selects what appears most significant to them. Another model is subjective observation, derived from psychoanalysis, which, while stemming from the need to observe the relationship between a young child and their mother (infant observation), provides interesting insights for observing educational situations not exclusively related to childhood. What mainly characterizes this methodology is the fact that the observer focuses their attention not only outward but, above all, inward, capturing not only the objectivity of concrete data but also elements that belong to their individuality, thus related to their subjective reactions to certain events or situations. The description of events is primarily characterized by qualitative elements, often accompanied by reading hypotheses made by the observer themselves. The fundamental and characteristic aspect of this model is the attention to the emotional context. In fact, a participatory type of observation is activated where the observer, an actor in the relationship and emotionally involved in it, analyzes not so much the objective events but the dynamics of the relationships. The collection of the gathered data is carried out afterwards through the drafting of descriptive reports of the aforementioned elements. However, this may inevitably lead to a loss of information. Moreover, since it is a qualitative observation, elements of inference may intervene in the recording.

Finally, another model is deductive observation, which unfolds within the clinical-experimental model. The term clinical leads one to think of a thorough and prolonged observation carried out on individual cases; in reality, when speaking of "case", we do not only mean a subject in their singularity but also refer to a situation with its own unique history, such as a school class, a group of adolescents at a gathering center, etc. The aim of the clinical method is to carry out an in-depth analysis of the case through prolonged observation over time, making evident the internal reality by shedding light on the characteristics of the processes underlying the observed behaviours. In general, all observational methods that refer to the clinical model share the fact that they take place in a structured context and are guided by one or more cognitive hypotheses. In educational and school contexts, the clinical method is undoubtedly the most widely used, even if often unconsciously. An example of clinical observation is provided by Piaget's research, whose concern was indeed to establish an interaction between observer and observed taking place in a natural setting (Umoh, 2023). The researcher, through observing his three children, aimed to investigate the development of intelligence in the first two years of life. In doing so, he combined individual observation with a procedure termed "quasi-experimental", applying research strategies to the child's reactions. The observation carried out by Piaget is conducted in the field, in normal play situations. In this case, the presence of the observer does not constitute a disturbing element as he is a familiar and known figure to the children. In the initial phase of his research, he primarily used the tool of dialogue. By asking his children questions, the researcher seeks to understand their thinking, structuring subsequent questions based on their responses and simultaneously directing the discussion towards a clearly defined and understood itinerary. The language utilized during the conversation adapts to that of the child and the type of responses they provide. Subsequently, the child is also observed during the implementation of activities proposed and guided by the observer, according to a precise plan. It is evident that, although the dialogue is not guided by predetermined questions, the observer still possesses clarity and awareness regarding the objective of the detection, which is to understand the notion of thought in children. Using this approach, an ad hoc situation is created where the relevant variables can be observed. The data gathered following the observation are selected and analyzed. Therefore, it proves to be a very useful method, in the school setting, for gathering information about students' characteristics, their attitudes, and aspirations. However, there is the risk that, if the observer is not adequately prepared, their behaviour or verbalizations could influence the responses of the observed subjects. We have briefly seen that there are different ways to conduct observation, depending on the type of problem and the various theoretical options underpinning the researcher. In any case, however, the procedure for conducting a correct observation is the same and involves necessary choices without which the observation cannot commence (Abdullahi & Umoh, 2024, p.406).

Planning a correct observation

The success of an observation greatly depends on the choices the researcher makes prior to their activity, which mutually influence each other. These involve:

- Defining the objectives,
- Outlining the object of observation,
- Choosing the methods of data collection,
- Choosing techniques for data recording,
- Indicating the duration and frequency of observational operations.

Defining the objectives of the observation is a fundamental initial step that will determine the choice of subsequent steps. Outlining the observational field will allow the observer to focus their attention solely on that objective and to gather meaningful informative data. Defining the object of observation is necessary to specify what we need to observe and thus to direct our attention towards facts or representations. In the first case, one will focus on the characteristics of the situation and/or behaviours, while in the second, one will collect opinions. At the same time, the observation can be attributive, aimed at verifying the presence or absence of one or more objects or a certain characteristic, or narrative, being more interested in the unfolding of actions, effects, and consequences of actions. Moreover, the observation can be introspective if the subject and object of observation coincide and allospective when conducted by a different subject than the one being observed.

Next, we will choose the method of data collection. This can be narrative or structured. In the first case, the researcher describes everything that happens while in the second, they record data obtained through predefined behavioral category systems. The choices made in the previous phase necessarily determine those to be made in this phase where techniques for data recording must be established. Indeed, if one opts for narrative detection, the techniques to be used will have to be narrative techniques. Among these are the diary and logbook, the critical episode method, and techniques for recording a slice of life. Alternatively, if structured detection is chosen, the techniques used will be those for systematic observation, such as checklists and inventories. For completeness, we will describe very briefly the narrative-type techniques, while for those related to structured observation, we refer to the third segment, where they will be explored in depth.

The diary is a technique of narrative and retrospective observation that consists of describing one's activities or those of others in the language usually used. The critical episodes method involves anecdotal records, meaning the quick and as precise, and objective as possible annotation of significant words or relevant actions occurring in a specific situation. The logbook is an extension of the diary technique and involves not only describing the activities taking place but also additional contextual information such as circumstances, effects, and difficulties encountered.

In the last phase, one must decide on the duration and frequency of the observational operations. One can choose to conduct temporal sampling in which intermittent intervals are established during which the subject and/or situation is observed, or opt for an event sampling in which the researcher focuses on aspects of a sequence and the behaviours occurring within it. One must keep in mind that in practice, despite the researcher paying great attention to these choices, it is possible that errors occur during the data collection phase, compromising the entire work. Below, we will outline some of these possible errors and propose solutions to avoid them.

Potential Errors and Strategies for Avoidance

For a long time, it was thought that it was sufficient to collect a series of orderly and accurate information deemed significant to ensure scientificity and objectivity in the detections made. This perspective, now outdated, does not take into account the fact that everyone, no matter how hard they strive to record the outcomes of an observation as accurately and systematically as possible, may infuse elements of subjectivity linked to their own way of "reading" reality, their cultural reference parameters, their beliefs, and values. Conducting a continuous, dynamic observation in educational contexts involves dealing with multiple and changeable variables, many of which are unpredictable. All this impacts the procedures for recording and cataloging data, which often cannot be conducted according to scientific criteria. Below are some of the main difficulties encountered and possible strategies for improvement.

One primary issue relates to the psychological and physical conditions of the observer, which could make the recorded data less reliable. Indeed, it should be noted that the observational process involves attention, memory, perception, and particular conditions of fatigue, anxiety, or fluctuations in attention may lead to partial or inaccurate data collection. In an educational context, where generally no pre-established observational setting is prepared and where observation is configured as a daily way of approaching reality, this risk should not be underestimated. There are not many ways to mitigate the highlighted risk, especially in circumstances where the observer faces unpredictable events/situations. A possible strategy could be that of an intersubjective retrospective comparison, provided that another person has also been able to observe the same situation.

Another potential error could arise in descriptive observations since the language used to describe the subject and events could assume an evaluative connotation rather than a descriptive one. This could lead to divergences in "interpretation" by those accessing the observational protocol. In narrative observations written with a manual technique, the choice of words and adjectives used to describe a particular event influences the message and the content we wish to convey. The ability to provide a respectful snapshot of reality, as well as the skill to accurately document an observed event by capturing the sequence of events and presenting it to the reader, is not a trivial matter. It is therefore insufficient to document a fact; one must strive to make it comprehensible to others. A useful strategy in this regard is certainly to always read the result of one's considerations, trying to put oneself in the shoes of someone not present during the observation who wishes to have as clear a picture of the situation as possible. To ensure that observation is complete and exhaustive concerning its underlying objective, it is considered that a useful

tool could be the use of a grid serving as a guide for drafting the protocol.

Furthermore, in educational contexts, it is not always easy to immediately note what has been observed, as the educator is both an observer and a participant in the educational situations. Often observations are made subsequently, thus carrying the risk of information loss and greater subjectivity and inference. A possible strategy to partially mitigate this inconvenience could be to have a notepad readily available to quickly jot down significant elements so that later it will be easier to reconstruct the observed events as realistically as possible.

Another important factor representing a risk of error is undoubtedly the observer's expectations and their emotional involvement. The personal expectations of the educator regarding the user may give rise to further distortion of the observational data. Often, indeed, there is a risk of observing precisely what one expects to see, not out of malicious intent, but due to an operation of information selection of which one often is unaware. This risk is particularly pronounced among educators, who inevitably find themselves emotionally involved in the situations being observed. Anticipating the joint presence of multiple observers, positing an inter-observer approach, and proceeding with a comparison that eliminates elements of inference or evaluative judgment, is undoubtedly a useful strategy to partly mitigate the highlighted risk. However, this is often difficult to envisage in educational settings. Additionally, one should not underestimate the distortions attributable to the observed subject, who may interpret the observer's personal desires and tend to please or counteract them. But also, distortions stemming from the Hawthorne effect, which refers to variations in a phenomenon or behaviour occurring due to the presence of observers but which do not last over time.

Conclusion

In conclusion, observation emerges as a crucial component of both the educational process and scientific inquiry. It allows educators and researchers to gain insights into phenomena, behaviours, and contexts, enabling an in-depth understanding of the dynamic interactions at play. The distinction between merely looking and actively observing underscores the importance of a thoughtful, open-minded approach that prioritizes objective data gathering while remaining conscious of personal biases. As various observation methods—inductive, subjective, and deductive—illustrate, choosing the appropriate approach based on the specific context and objectives is essential for meaningful analysis.

Additionally, effective planning and execution of observational practices are paramount to ensure data accuracy and relevance. By defining clear objectives, selecting suitable methodologies, and acknowledging potential pitfalls, practitioners can enhance the quality of their observations. Ultimately, fostering a robust analytical mindset and embracing the complexities of human behaviour will not only enrich educational environments but also advance knowledge across diverse fields of study. Through careful observation, we can better understand the intricate tapestry of learning and interaction, paving the way for informed interventions and deeper connections within educational spaces.

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