Unit 2: Observation of Staff and Analysis

Achieving Reliability in Observation

MODULE 4

ACHIEVING RELIABILITY IN OBSERVATION

CONTEXT

Observation and conferencing about a protégé's practice can be powerful mentoring strategies. Your success as an observer, however, depends upon trust. During observations, protégés must trust you to assess their teaching fairly, consistently, and objectively. They must also know that if other Mentor-Coaches in the program observe them, the observation will be conducted in the same way. This is what we mean by "reliability." The goal of this module is to help you observe protégés fairly, objectively, and consistently. When you do this, you achieve reliability. The module will also help you guide others to achieve reliability. This is critical for programs with multiple observers.

TIME: 3–4 hours

OVERVIEW

- Exercise 1: Background Reading: Strategies for Achieving Reliability in Observation (30 minutes)
- Exercise 2: Joint Observation and Partner Discussion (2 hours)
- Exercise 3: Building Consistency Throughout Your Program (1 hour) (Optional)
- Exercise 4: Professional Development Plan (30 minutes)

LEARNING OUTCOMES

By completing this module, you will:

- Gain and be able to apply knowledge about reliability in observation
- Understand the impact of bias on observation
- Learn strategies for achieving reliable observation
- Understand your strengths and challenges as an observer.

EXERCISE 1: BACKGROUND READING

Read and reflect on this background reading before you move on to the next exercises.

Strategies for Achieving Reliability in Observation[1]

Observing protégés is one of your most useful Mentor-Coach tools. To use it successfully, you must have strong, trusting relationships with protégés. Protégés must trust you to assess their practice fairly. They must also know that if other Mentor-Coaches in the program observe them, the observation will be conducted in the same way and the results will be similar. This is what we mean by reliability in observation.

It is important for each Mentor-Coach to achieve reliability. Take the example of a Mentor-Coach who observes a protégé one day and comes to a particular conclusion about what he or she has seen. If the Mentor-Coach observes again the next day and sees the same thing happening, then the conclusion or score should be the same as the previous day. This is called *intra-rater* reliability. Each Mentor-Coach should strive to achieve this intra-rater reliability to be fair to protégés.

In a similar way, when there is more than one Mentor-Coach in a program, all Mentor-Coaches should be arriving at very close to the same scores or conclusions when they observe in classrooms. It would not be fair for one Mentor-Coach to score a particular activity or setting positively while another scored it very differently. This agreement between raters is called *inter-rater reliability,* and it is also something for which Mentor-Coaches should strive. Observations that achieve reliability from one observer to the next are more effective and provide all staff members with consistent messages, no matter which observer is involved.

[1] Adapted from U.S. Department of Health and Human Services, Administration for Children and Families. (1998). *Moving Ahead: A Competency-Based Training Program.* Activity 1-D: Leading a Guided Discussion. Washington, DC: Author.

As we discussed in Module 2, you must also understand your preconceptions. You must be aware of how biases can influence your observations and work to identify and address biases. If you don't, your biases may override the accuracy of your observations and conclusions.

You and your program can use several strategies to improve reliability in observation. As a Mentor-Coach, you can obtain training to use a formal tool. You can look for patterns in observation notes. You can conduct joint observations. And you can videotape observations.

Adoption and use of a formal tool. When you enter a classroom, you are flooded with information. The room is hot or too chilly. Children's voices rise and fall as they work at the water table. Suddenly you notice the condition of the furniture. How did that water table become so battle-scarred? As you make your way through the room, you smell the muffins the children had for break-fast. You also notice that the children's colorful paintings hang on the wall.

You might notice all of these items in a visit to a classroom. And you might find it hard to focus. It is impossible to process all of the information available to our senses. Our brains selectively attend to some of these items. This selection helps us to organize this potentially overwhelming information.

Selective attention occurs during observations. We don't all see the same thing. When we looked at the picture in Module 2, some of us saw an old woman, others a young woman. Our culture, our values, our preferences, and countless other factors help to shape what we attend to. Consider, for example, the simple task of describing a dollar bill. A group of people sitting at the same table looking at the same dollar bill for the same amount of time will provide very different descriptions of what they see:

- "... measures approximately 2 1/2 by 6 inches"
- "... is shaped like a rectangle"
- "... has black and green printing"
- "... has a crease down the middle"
- "... contains letters, numerals, and pictures."

Without a focus for the observation, each observer will pay attention to different things.

Formal tools, especially those with a closed format, help you focus on specific information. They allow you to attend objectively to the items included in the tool or checklist. Many observers use tools like the ELLCO, the ITERS, or the Early Childhood Environment Rating Scale (ECERS). They report that these tools help them screen out distractions.

Many programs ask multiple observers to use the same formal tool. This is a great way to coordinate observations by multiple observers. All observers must be trained in how to work with the tool. And they must agree on how the tool will be used and scored. Reliability depends on agreement about how to interpret and score what is observed.

Periodic review of observation notes. You can use the strategy of periodically reviewing your notes to make your own observations more reliable. This strategy can also help multiple Mentor-Coaches be consistent in their observations.

You can search for patterns in your observations by reviewing your observation notes. You may identify:

- Pet peeves—minor issues that you find you pay too much attention to during observations. If you focus on a pet peeve, you may fail to support teachers in important areas.
- Value judgments that influence the recording of observation information.
- Change in what you believe is important. Your understanding of effective practice changes over time. You begin to look for new things, based on new knowledge or advancements in the field. This is natural and positive. But do not hold protégés that you observe later in a review cycle to a higher standard than those reviewed earlier.

You may want to remove from or hide protégés' names on the observation files you review. If you do this, you can more readily detect instances of your own observer bias. You may also want to help develop a program-wide process for reviewing notes. With a system in place, multiple observers are more likely to provide consistent feedback.

A system can also help you identify patterns in observers' practices. It may reveal differences in practices that the program can address through

professional development. Programs use many approaches to develop a system. In some programs, a senior education manager or lead Mentor-Coach reviews a sample of observations as part of ongoing monitoring. In other programs, Mentor-Coaches and supervisors review each other's notes. Regardless of the approach, all of the systems have the same goal. They support Mentor-Coaches in identifying patterns in their own findings and in those of others.

Conducting joint observations. It can be very helpful to observe with a colleague. Doing so can help you establish reliability. Mentor-Coaches who conduct joint observations report that they learn a lot about their blind spots. Many programs use the process of joint observation as a professional development support system for Mentor-Coaches. In Exercise 2 of this module, you will have a chance to observe with a colleague and compare your notes.

Videotaping an observation. A video camera is an observer's best friend. Video footage provides a record of what observers see. It can also help to narrow the focus of the observer. And it can help screen out other distracting activities in the classroom. Mentor-Coaches who videotape have a great resource with which to supplement their notes and jog their memories.

Video footage can also help build agreement about protégés' practices. Mentor-Coaches can review, score, and discuss footage together. Doing so can also help the biases of individual reviewers or the group as a whole come to the surface.

Your program may have policies about videotaping and obtaining permission to tape children or adults. Be sure that you understand and comply with such policies before you proceed.

You will have a chance to read and think more about using videotaping in Unit 4, Module 4.

In summary, programs can use many strategies to improve reliability. The case study on the following page tells the story of one program's efforts.

Case Study: Achieving Reliability in XYZ Head Start

XYZ Head Start began early literacy mentor-coaching in the spring of 2003. They promoted Sylvia to be the new Mentor-Coach. Sylvia was a classroom teacher who had just earned her Bachelor's Degree in early childhood education. Sylvia's role was to orient new teachers and help them and their assistants understand new research. She guided them in using effective early literacy practices. Mary Ruth, the education manager, continued to provide direct supervision to the program's 28 teaching teams. Three site supervisors supported her. Together, they all used reflective supervision to help the teams with early literacy.

After Sylvia's promotion, the five education leaders held a full-day planning meeting to design their mentor-coaching services. "Most of us had worked for the program for a number of years. We understood the program's systems and basic early childhood practice. But the emphasis on early literacy was new for some of us," Mary Ruth explained. "We felt it was important to provide consistent services across our four centers. We wanted to make sure that all children benefited from our new emphasis on early literacy."

The team learned about the ELLCO tool at a regional conference. The region's Early Learning and Literacy Specialist connected Mary Ruth with an Early Literacy Mentor-Coach consultant who could train the team on the tool. The consultant led the team in discussions about the ELLCO checklists. She also discussed the classroom observation and interview protocols with the team. She helped them think about how to use the instrument in the program.

To help build greater consistency among the team members, the Mentor-Coach consultant suggested that each member videotape a classroom observation. Each person agreed to focus on a different section of the ELLCO in the next few months. Mary Ruth promised to videotape an observation on supporting writing. Others promised observations of book reading. In the following months,

the team viewed each of the observations together. The consultant helped the team members to compare the scores they assigned to the videotaped teacher based on the ELLCO rubrics.

“In our first joint observation, our scores differed significantly,” Mary Ruth admitted. “We talked through our differences until each member of the team agreed on the same score. We all learned a lot about ourselves and about each other. For example, I learned that I tended to give teachers the benefit of the doubt. I knew the kinds of training that we had provided for teachers in the last few years. So I always assumed that they knew how to use language and literacy concepts, even if I didn’t see examples during the video clip. As a result my ELLCO scores for teachers were usually higher than those of the other observers. The consultant suggested that we each keep a journal of the blind spots and other biases that the process revealed.

“As the months went by, we began to see our scores becoming more alike. We now view teacher practices in the same light. We also agree about what we want to see in all of our classrooms. As education leaders, we use this new vision of language and literacy excellence with teaching teams. The experience has been time consuming, but we all agree that it was worth the investment. In fact, we have agreed to continue to jointly view a new videotaped observation once every quarter. This process will not only help us to keep our vision consistent, but it is a great way to orient any new observers who join our group.”

Questions for Reflection

Think about the strategies that XYZ used to enhance reliability in their program.

1. Which strategies are you or your program already using?

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2. Which would you like to try?

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EXERCISE 2: JOINT OBSERVATION AND PARTNER DISCUSSION

Think again about the picture of the woman in Module 2, and remember that different observers saw different things in the same picture. This exercise will help you explore how your observation results differ from those of a colleague. You may also identify possible areas of bias.

Step 1: Prepare for the observation

- Choose a partner. Ideally your partner should be a *Steps to Succ*ess participant. If this is not possible, select a staff member from your program with experience in classroom observation. Ideally, the partner should also have background knowledge in early language and literacy.

- Select a formal observation tool to use in this exercise. The tool may be the one that you currently use in your program, or you may select an alternative.

- Review the observation tool with your partner. If you choose to use the ELLCO and this is your first experience with the tool, review those sections introduced in Module 2 (Questions 2 and 10). Plan to complete these sections during the observation. Be prepared to spend between 45 minutes to one hour conducting the observation.

- Choose a classroom to observe. First, meet with the teaching team. Explain the reason for the joint observation. Be sure to tell them how long the observation will take. Ask the team about their language and literacy goals. If possible, include your partner in the meeting. If your colleague cannot attend the meeting, be sure to update him or her before the observation.

- Set a time and date that is convenient for all parties.

Step 2: Conduct the observation

Jointly conduct the observation using the tool. During the time you are observing, do not interact with your co-observer in any way. On your own, document the results of the observation on the tool. Be sure to record examples that led you to select a certain score.

Step 3: Engage in the analysis of the information

- Prior to meeting with your partner, complete the Observation Data Analysis Guide and reflect on your observation.

- Meet with your partner to share scoring results if you used a formal tool. Share your reflections and the information you recorded on the Observation Data Analysis Guide. Together address the following questions:

  1. What challenges did you face in conducting the observation? What could you have done differently to make the observation experience more effective?

  2. What were your overall impressions of the classroom?

  3. How did you rate the teacher on each of the tool's items? What examples prompted your scores?

Step 4: Reflect on the experience

On your own, reflect on your joint observation experience and the analysis that you completed with your colleague. Consider the following questions:

1. Did any patterns emerge from the joint review of the information? For example, were your scores consistently higher or lower than those of your colleague?

2. Did you consistently cite examples that were different from those of your colleague? Did patterns emerge?

3. Were there questions on which you had difficulty reaching consensus? If so, why?

4. Did your experience alert you to any biases in your observation and analysis? If so, what were they?

5. What steps will you take to control these biases in future observations?

Observation Data Analysis Guide

TEACHER'S NAME	
TEACHER'S CLASSROOM LITERACY GOALS	
AGREED-ON FOCUS AREA FOR OBSERVATION	
DESCRIBE THE CRITICAL EVENTS THE OBSERVER NOTED	
DESCRIBE ANY EVIDENT PATTERNS	
LIST POINTS TO DISCUSS IN POST-OBSERVATION CONFERENCE	

EXERCISE 3: BUILDING CONSISTENCY THROUGHOUT YOUR PROGRAM (Optional)

If your program has several Mentor-Coaches or other staff that conduct observations, you may want to complete this exercise. It is designed to raise program leaders' awareness of the importance of reliability in observation.

Share the background reading and the XYZ case study from Exercise 1 with your program's education manager. You might also share it with a lead Mentor-Coach or with the person responsible for overseeing education services. Schedule a meeting to discuss the value of building consistency in observation. Discuss ideas that you learned from the background reading. Share ideas that you have formed on your own. Be sure to consider strategies that would work given your program's budget, geography, and staff needs.

EXERCISE 4: PROFESSIONAL DEVELOPMENT PLAN

Think back on the information in this module:

- Learning about reliability in observation
- Understanding the impact of bias on observation
- Gaining strategies for achieving reliable observation
- Understanding your strengths and challenges as an observer.

Take a few moments to reflect on these questions:

1. What personal or cultural biases do you have that may affect your objectivity during observation?

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2. Have you received enough training to conduct and score a focused observation?

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3. What strategies will you use to ensure reliability in your own and your program's observations?

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4. What are some skills you would like to practice? What additional knowledge do you want to acquire?

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5. How will this information influence your work as a Mentor-Coach?

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Based on your reflections, revisit your Professional Development Plan and make any necessary updates.

Congratulations on completing Unit 2! You are now ready to proceed to Unit 3: Reflective Practice.

UNIT 2 REFERENCES

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