

**Leading a Montessori Elementary Classroom
Monograph Series, Vol. VII**

Formal Observation Tools and Techniques

Narrative Style

Anecdotal Record

Running Record

Diary Record

Sampling Style

*Time-Sample
Event-Sample*

**by
Betsy A. Lockhart**

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Lockhart Learning, P.O Box 3443, Evergreen, Colorado 80437-3443
lockhart-learning.com

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Formal Observation Tools and Techniques

Leading a Montessori Elementary Program is a collection of monographs on topics pertinent to classroom design, implementation, management, and leadership. In essence, it is the implementation of the Montessori Method in real classrooms.

This monograph, *Formal Observation Tools and Techniques* is suitable for new and experienced teachers in any school who are looking for a fresh outlook on observing children in order to study academic, social or emotional situations in the classroom. The axiom “A problem well defined is a problem half solved,” has been attributed to many different individuals, attesting to how universally it applies. Formal observation techniques help teacher/observers define the situation that they are trying to research, whether it is a problem to be eradicated or a behavior that they are trying to replicate, and then make objective observations to further their understanding of the situation and suggest “next steps”. Observation can be used to determine:

- what happens in a child’s process when working with test-tube division that allows errors to creep in
- what is keeping a child from being able to complete work in a reasonable amount of time
- what causes transitions to be prone to interpersonal conflicts
- why a particular child is so often teary by mid-morning
- what inspires a particular child
- the root cause for repeated playground conflicts
- why children relate to certain children as leaders
- what processes make particular children more successful than others
- which children would make good partners based on learning style / work style
- many, many more

Many teachers feel that they don’t have time to make a formal observation or that they can observe without recording their observations. Often, teachers do the majority or all of their observation informally, while giving lessons or when between lessons. In fact, recording observations not only helps the observer remain neutral and open to multiple interpretations of events, but also provides a record for the teacher to reference as the situation evolves, for parent-teacher conferences, or meeting with other support adults (in-school educational specialists, therapists, counselors, etc.). Additionally, formal observations can provide crucial information when referring a child for individual assistance with a particular issue.

Formal observation need not take a long time – it can be done very effectively in 15-30 minutes, greatly enhancing the teacher’s effectiveness. This monograph provides descriptions and examples of some of the more common formats used in formal observation, with a discussion of their relative advantages and disadvantages. It is presented with periodic workbook-style opportunities if the observer wants practice before trying them in the classroom, by watching interactions at the airport, playground, recreation center, library, or wherever children interact with one another or adults.

Other Monographs on Leading a Montessori Elementary Classroom by Betsy Lockhart:

Volume One: Introduction to Montessori at the Elementary Level

Volume Two: Designing the Classroom Environments

Volume Three: Planning Work in the Montessori Elementary Classroom

Volume Four: Structuring Work in the Montessori Elementary Classroom

Volume Five: Feedback and Grades

Volume Six: The Use of Effective Observation in a Montessori Classroom

Volume Eight: Parents as Partners

Volume Nine: The Rest of the Partnership

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