



Education and Culture DG

Lifelong Learning Programme



## INTRODUCTION

This tool describes how you make observations in an objective manner. It also features some typical observation errors.

## GLOSSARY

**Key words:** cfr tool Standard of Assessment

- **Competency:** the ability to use knowledge, skills and attitudes in a job embedded situation.

**Link** with the tool Standard of Assessment

## TOOL

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## OBSERVING COMPETENCIES

Adapted from: “SEYNAEVE, K., Praktijkgids competentieontwikkeling. Leuven, Acco, 2006. p 54 - 60”

Observations are necessary to evaluate the competence level of the trainee. This assessment provides input needed for the coaching process and the evaluation.

The supervisor is the best placed person to observe. He is closest to the trainee. The reliability increases if several observers are involved. Two observers however is a minimum. Observations can be made by all colleagues working with the trainee.

Observations of actual behaviour lay the foundation of competence measurement. Therefore, it is important that this takes place in an objective, systematic way. The **'OTCQAR'-process** (Observe – Take Notes – Classify – Quantify – Assess – Report) represents the 'manual' for that actual purpose.

### OBSERVE

This consists of observing behaviour at the workplace as accurately as possible, without immediately giving an interpretation of what is actual being observed.

These observations can be either positive or negative. Examples of observations are: is cleaning the workplace, is welcoming when entering a room, is refusing to bring blood samples to the lab.

People often tend to focus on negative information. Of course, it is important paying attention to that matter, but on the other hand, we also need to look out for actions being accomplished in a good way.

When observing, we should look out for possible observation errors such as:

- **First impression:** People tend to jump to conclusions based on first impressions. That way, a first negative impression of a trainee can lead to negative observations.
- **Negative information:** negative information about the trainee's past can have a negative influence when observing. We also need to be alert at the following point : previous made mistakes (e.g. during preceding internships) should not influence us if we want to obtain objective behavioural observations.
- **Projection:** people tend to project characteristics of themselves on other people. A supervisor, who is flexible, will quickly think trainees are flexible as well. However, a supervisor who is clumsy his/herself shall not quickly make observations that may indicate that awkwardness.
- **Similarities and stereotypes:** it is important to observe each trainee individually and not to compare them. A person, who looks like someone else, does not necessarily work in the same way and, therefore, does not make the same mistakes.

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If several trainees are working at the same time, you quickly tend to compare them. You no longer compare the performance of a trainee with the competency profile but with the functioning of other trainees. This may not be the intention.

- **Assess on irrelevant criteria:** it is important to gather only relevant information when observing. For example, it is not necessary to assess a trainee negatively on making 'difficult family conversations' if this is not mentioned in the competence profile.

The observations are made in a specific way, namely the competences described in the **competency profile**. Not all the observations are relevant. By determining in advance the major topics, the observations become **purposeful**.

## TAKE NOTES

The observed behaviour should be noted as precisely as possible to reach a realistic assessment of competencies. Only observable behaviour is recorded without interpretations or characteristics. When we observe over a longer period and nothing is been noted, much information can get lost. Therefore, it is interesting to create a log or a file on your PC, where you systematically gather notes per trainee. A log is a tool that can be used to save notes and observations over a longer period. Along with the observations, the date and name of the observer can be clearly mentioned. Below in the table, you can find as an example the possible extracts of a log, with both good and less favorable observations.

Table 1: Extract log with good and less favorable observations

### Examples of specific behavioural observations

#### Good notes:

- Sighs when I request to bring a blood sample to the lab
- During briefing: doesn't sit straight on a chair, leans back, looks outside, looks at watch at least 5 times, does not take notes.

#### Not!

- Did not feel like it today

⇒ This is a conclusion being drawn from observed behaviour such as sighs when he/she gets assigned a task, leans back in chair, takes a 15 minute break instead of 10, ...

#### Good notes:

- Is present on time
- Takes breaks as agreed and is present at the office on time.

#### Not!

- Is always punctual
- This is a general conclusion being drawn from observed behaviour such as taking breaks as agreed, is present at the office on time. You can only make this general conclusion when this behaviour is re-observed every day.

#### Good notes:

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- Asks how the hoist works.
  - Is giving Mr X a bath using the hoist without any help from colleagues. Mr X tells me he enjoyed his bath.

**Not!**

- Is eager to learn
- ⇒ This is the conclusion being drawn from observed behaviour such as: asks how the hoist is working, is informing with the social service about possible benefits for Ms Y and is shortly making a report at the briefing.

As already mentioned in the chapter 'observe', it is important to note positive observations as well.

Information coming from clients or external services can also be a useful additional source, but we should be aware of subjective information. Snap shots can be made. This information must always be weighed up with what oneself and colleagues may determine over a longer period.

## CLASSIFY

This is the conversion or translation of the made observations into competencies. Therefore, it is necessary that in advance, you have a clear view of the competencies to be measured and their definition. You can sort the observations by putting each under a competence – for example: returns to the storeroom to retrieve material that was forgotten, has left waste material in the room, can be put below the competence 'work accurately'. **You classify each observation under a competence.**

## QUALIFY

Once you know under which competence to classify a certain behaviour, you can give a **value judgement** on this competency. Therefore, you can check on which level the behavioural indicator of the trainee is situated. In the example above, the trainee will get a negative score on the accuracy competence.

Maybe you have gathered conflicting information concerning a specific competence. Then it is important taking this into account to nuance to judgement. You pass the information that way to the school supervisor.

## ASSESS

The amount of information has to be processed and grouped in an appropriate way. In this way, you can draw the right conclusion about the functioning first as an intern and later on as a professional. The supervisor makes a statement

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about the **overall performance of the trainee**. Other predetermined factors can play a part such as progress compared to previous moments of assessment about the same competences, score on additional tasks, participation in peer moments...

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## CONCLUSION

The OTCQAR' method is relatively easy to implement, because it can be applied during the daily work situation, and it requires little additional resources. A longer period of observation provides reliable information about behavioural competencies. Nevertheless, it requires a sustained effort from the mentor and colleagues to systematically record observations of all trainees. Describing behaviour through actual examples is not an easy exercise. It requires a specific skill and vigilance to all potential pitfalls and assessment inaccuracies.