

Contributions to the design of participant observation instruments in nursing research nursing students

Aportes para el diseño de instrumentos de observación participante en investigaciones de enfermería

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Abstract

This reflective article aims to offer recommendations for the design of participant observation instruments applied in research in the field of nursing. Participant observation as a research technique is examined theoretically, exploring its fundamental characteristics and its relevance in the study of social and health phenomena. It also classifies the different types of observation and offers practical suggestions for the development of effective instruments. The methodology adopted is situated within the interpretative paradigm, using the hermeneutic approach to analyse and understand the contributions of various authors who have enriched the understanding of the use of participant observation in scientific research.

Resumen

Este artículo de reflexión tiene como finalidad ofrecer recomendaciones para el diseño de instrumentos de observación participante aplicados en investigaciones en el ámbito de la enfermería. Se examina teóricamente la observación participante como una técnica de investigación, profundizando en sus características fundamentales y su relevancia en el estudio de fenómenos sociales y de salud. Asimismo, se clasifican los diferentes tipos de observación y se brindan sugerencias prácticas para el desarrollo de instrumentos eficaces. La metodología adoptada se sitúa dentro del paradigma interpretativo, utilizando el enfoque hermenéutico para analizar y comprender las contribuciones de diversos autores que han enriquecido la comprensión del uso de la observación participante en la investigación científica.

1. Introduction

Participant observation, as a technique for gathering information in nursing research, offers a valuable tool for directly capturing the interactions, behaviours and dynamics of the clinical setting. Through this methodology, the researcher immerses him/herself in the care context, which allows him/her to gain an in-depth understanding of the practices, relationships and experiences of health care staff and patients. This technique facilitates a holistic view, considering both the social and cultural aspects that influence care and perceptions of health.

In the field of research, participant observation is positioned as an essential technique for collecting data and understanding phenomena in their natural environment. Through its application, the researcher systematically identifies and records what happens, without intervening or altering the observed context.

Recognised as a key tool in various scientific disciplines over time, participant observation offers a direct and contextualised view that enriches the analysis and understanding of social and human phenomena. This paper examines in detail the theoretical reflections related to observation, highlighting its characteristics, advantages and disadvantages in the field of research [1].

In addition to delving into the particularities of this technique, the text explores the different types of observation that can be used in research. It also provides practical recommendations for the design of instruments for participant observation in order to optimise both the effectiveness and validity of the data obtained.

2. Methodology – Materials y Methods:

The methodological approach adopted in this work is based on the principles of the interpretative paradigm and falls within a qualitative framework. The hermeneutic method is used as a fundamental tool for the interpretation of the ideas and arguments presented by various significant authors in the area of study. This approach aims to facilitate a comprehensive understanding of participant observation

as a research technique, considering aspects such as its characteristics, as well as its classification and recommendations for its design.

The implementation of this methodological approach allows for an in-depth and contextualised exploration of participant observation, which contributes to a more complete understanding of its usefulness and relevance in the field of scientific research in the area of nursing. Furthermore, this methodology promotes a critical analysis that allows for the identification of opportunities for improvement and best practices in the application of participant observation in research contexts, thus ensuring greater validity and reliability of the results obtained.

3. Resulted

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Theoretical reflections.

There is no doubt that observation is an intrinsically human activity, in which the individual uses his or her senses, mainly sight, to acquire knowledge about an object of study or a specific phenomenon. The action of observing goes beyond merely looking, as it implies adopting a particular attitude and approach that shapes and constructs the reality

being analysed. During the process of observation, questions arise and questions are generated about what is being perceived [2].

It is undeniable that observation is an inherently human activity, in which the individual employs his or her senses, especially sight, to acquire knowledge about an object of study or a specific phenomenon. Observation differs from simply looking, as it involves adopting a particular stance and approach that shapes and constructs the reality under examination. Through observation, questions are generated and what is being perceived is questioned [2].

In general terms, observation can be defined as a descriptive activity that seeks to reveal the nature of things and understand the context prior to any intervention. However, it is also seen as an active process involving the mental selection and classification of what is perceived, which makes it a means of organising and structuring the information gathered.

Within the broad field of research, some consider it a method, while others see it as a technique. Although the two terms share similarities, there is a key difference: method is largely influenced by the area of study, while technique is adaptable to a variety of fields. In this paper, we define observation as a technique that, through the use of specific resources, facilitates organisation, coherence and efficiency in the development of an investigation. Therefore, the structure and coherence of this technique are adjusted to the method used.

In the philosophical realm, it is argued that observation is the process by which the individual refines sensory information through thought, including the formulation of ideas, judgements and reasoning, which enables him to construct his understanding of the world. When discussing the processes involved in observation, it is essential to recognise that these are logical and deliberate sequences that take place within a particular time and space frame. These processes may extend over days, weeks or even months, depending on the scope, experience and objectives of the researcher with respect to the phenomenon, object or event under study [3].

According to Weber [4], observation adopts a comprehensive-explanatory approach that conceptualises social relations as meaningful actions. From this perspective, the construction of the object of study involves the formulation of 'ideal types', which are representations of possible relationships and which allow for a causal explanation of human actions. In this sense, the cognising observer perceives reality in a partial way, using the ideal types as interpretative tools. Thus, objectivity arises from the interpretation and application of these models, and the understanding of reality is achieved through the abstraction of typical features, considered as models of rational behaviour.

Mejía [5], in his work 'Perspectiva de la Investigación Social de Segundo Orden', argues that the observation process is not limited to the simple perception of sensations, but also involves the active application of theoretical frameworks that facilitate the selection of data from reality. Furthermore, he stresses that the dynamics of observation goes beyond the interpretation of the data itself, as it acquires meaning mainly through the previous theoretical structures that contextualise it and give it meaning. In this way, Mejía proposes that external reality should be understood as a structured interpretation that possesses intrinsic meaning, highlighting the importance of theoretical frameworks in the interpretation of observed phenomena.

According to methodologists Kawulich, [6] Campos and Lule, [4] and Díaz, [7] Bracamonte. [8] among the main characteristics of observation, the following stand out:

- ✓ Observation is an innate ability in human beings, which is exercised mainly through the sense of sight. This ability not only allows visual information to be captured, but also plays a crucial role in the interpretation and analysis of what is perceived.
- ✓ The way in which observation is applied is deeply influenced by the observer's personal perspective and previous experience. The accumulated knowledge and context in which the observer is situated affect his or her ability to interpret visual data and to make meaningful connections.

- ✓ As a method of perception, observation facilitates the acquisition of information about the environment, enabling individuals to explore and understand the world around them more effectively.
- ✓ Observation can be carried out directly, through a person's visual attention, or through the use of various tools and technologies, such as lenses, specialised equipment, computers, microscopes and telescopes, which enhance a human's ability to pick up details that might otherwise go unnoticed.
- ✓ Furthermore, observation can occur spontaneously, when it arises without prior intention, or it can be a planned and structured process. In the latter case, a series of methodical steps are followed that guide the observer in investigating and understanding a specific object or phenomenon, thus ensuring a more systematic and reliable data collection.

Participant observation is a technique in which the researcher actively integrates with the group or context being studied, participating in its daily activities and adopting its perspective. This immersion allows the researcher to gain a deeper and more nuanced understanding of the group or setting, as he or she can observe first-hand the interactions, dynamics and behaviours that would be difficult to capture from an external position. This closeness to the reality of the group offers a richer and more contextualised view of their experiences and practices. [9,10].

One of the most distinctive aspects of participant observation is that it provides the researcher with a variety of valuable data on the expressions, feelings, interactions and activities of a specific set of individuals. Through this approach, individual discourses can be analysed and conclusions can be drawn that align with the cultural and social composition of each group. This is especially useful for understanding complex phenomena, as it allows the researcher to pick up subtleties that may not be evident in a more superficial analysis.

Because of its ability to provide a holistic and contextual understanding, participant observation has become one of the most widely used techniques in social science fieldwork. Its application not only facilitates the study of behaviours and relationships within groups, but also promotes an ongoing dialogue between the researcher and the community being studied, thus enriching the quality of the research and fostering a more collaborative relationship between the two. This technique is particularly valuable in areas such as anthropology, sociology and education, where understanding social interactions and cultural contexts is fundamental to accurate interpretation of data.

Participant observation is classified into two types, depending on the role assumed by the observer: outsider and technical observer and insider observer.

Outsider and Technical Observer, this type of observer seeks to maintain a high degree of objectivity and accuracy in their observations. However, this search for impartiality may increase the reactivity of the observed subject, i.e. the tendency of the person to modify his/her behaviour due to the presence of the observer. In addition, this approach has low ecological validity, which means that the results obtained are difficult to generalise to the natural context and are often more limited to laboratory conditions [11, 12].

A nursing researcher is conducting a study on the behaviour of chronically ill patients in a palliative care unit. In this case, the researcher assumes the role of an outsider and technical observer, where his or her aim is to collect data objectively without influencing the environment.

The researcher has no prior relationship with patients or health care staff. Their role is to observe interactions between patients and the nursing team, document how care is carried out and analyse patients' reactions to various medical interventions. To ensure objectivity, the researcher follows strict protocols, observing from a safe distance, without becoming directly involved in the care or interacting with patients.

For example, the researcher might observe how nurses handle the administration of medication to terminally ill patients, documenting the time it takes to perform the procedure, how they explain the care to patients, and how patients respond emotionally and physically. The aim would be to analyse the efficiency of the protocols and assess possible improvements in the quality of care, without altering the natural behaviour of the participants.

In this case, the observer is a person close to the subject, such as a family member or friend, which reduces reactivity and allows the observed to behave more naturally. However, this approach carries a higher risk of observational bias, as the emotional closeness and personal relationship may influence the observer's perception and thus the interpretation of the data [11, 12].

A nurse researcher is conducting a study on stress management in family caregivers of chronically ill patients. In this case, the researcher assumes the role of a close observer, which implies that he or she has a close relationship with the study subjects.

The researcher is, for example, a community nurse who has worked for years with families caring for their loved ones at home. Because of his or her previous and ongoing relationship with the families, the researcher is already part of the caregivers' environment, which allows the interactions and behaviours he or she observes to be more natural and less influenced by his or her presence.

A case in point might be a nurse who, as a close observer, accompanies a family where one of the family members is caring for a patient with Alzheimer's disease. The nurse not only observes the behaviour of the caregiver (who may be a close relative), but also participates in certain daily tasks, such as monitoring the patient and supporting the administration of medication. The observation focuses on how the caregiver manages daily stress, the strategies they use to cope with the demands of caregiving, and how family dynamics influence their emotional well-being.

Because of his or her proximity to the family and the role he or she already plays in their environment, the researcher can pick up subtle details of the caregiver's behaviour and emotions that may not be visible to an outside observer. However, care must be taken with observation bias, as their emotional proximity may influence the interpretation of the data.

Both types of observation have their advantages and disadvantages, and the choice between them will depend on the context of the research and the specific objectives to be achieved. It is essential to consider these aspects to ensure the validity and reliability of the results obtained through participant observation.

Recommendations for the design of participant observation instruments in nursing

The design of participant observation instruments in nursing requires careful planning to ensure that the data collected are relevant, accurate and for both research and clinical analysis. The following are some recommendations for their development [1, 8, 9, 11, 12]:

1. Define the objectives of the observation, it is essential to have a clear understanding of the objectives, such as assessing the quality of care, analysing nurse-patient interactions.
2. Clarity of purpose: Before designing the instrument, it is crucial to have a clear understanding of the objectives of the observation, such as assessing technical skills, interpersonal interactions or compliance with protocols.
3. Thematic focus: Delineate what specific aspects of the practice will be observed, such as technical skills, ethical issues, interpersonal interactions, or protocol compliance.
4. Developing categories or indicators:
 - ✓ Clear categorisation: Identify key behaviours, actions or events that are observable, measurable and related to the study objectives. These categories should be specific enough to avoid ambiguity.

- ✓ Performance indicators: For each category, develop clear indicators that describe what constitutes appropriate or inappropriate behaviour in the context of nursing practice.
5. Develop observation guides
 - ✓ Structured format: Create a guide that includes observation categories such as clinical procedures, nurse-patient interaction, hygiene, patient safety, and other relevant aspects.
 - ✓ Flexible format: Include space for additional descriptive notes or comments that may enrich the observation with details that do not fall into the predefined categories.
 6. Ethical considerations
 - ✓ Informed consent: Be sure to obtain consent from both nursing staff and patients or their relatives to be observed. Clearly explain the objectives and nature of the observation.
 - ✓ Confidentiality: Ensure that the information collected respects the privacy of patients and is used only for academic or clinical purposes.
 7. Pilot testing of the instrument
 - ✓ Preliminary validation: Prior to implementation, pilot test the instrument in a real clinical setting to identify potential difficulties in its use and make adjustments.
 - ✓ Training: Ensure that observers are well trained in the use of the instrument to ensure consistency and reliability in data collection.
 8. Reflection and critical analysis
 - ✓ Reflective observation: Encourage observers' ability to reflect on their own interpretations and possible biases that may influence the observation process.
 - ✓ Thorough documentation: Encourage detailed note-taking, including not only what is observed, but also the context and circumstances surrounding the events, which can be useful for later analysis.
 9. Incorporate technological tools
 - ✓ Audio-visual recording: If ethically appropriate and permitted, use video or audio recordings to supplement observations, which can allow for a more detailed and accurate review of interactions and procedures.
 - ✓ Digital platforms: Consider the use of applications or software that allow for real-time data collection and analysis, facilitating the systematisation of the information collected.

These recommendations facilitate a rigorous and ethical design of participant observation instruments, adapted to the specific needs of nursing. They contribute to improving the quality and accuracy of data collected in both research and clinical evaluations. They also provide key guidelines for creating effective instruments that promote data collection that is structured, rigorous and aligned with research objectives. These suggestions not only optimise the accurate capture of information, but also increase the validity and reliability of the results obtained.

4. Discussion and Conclusions

Participant observation, as a research technique in the field of nursing, is positioned as a flexible and profound tool that allows us to explore health phenomena from a close and contextual perspective. This approach makes it possible to capture complex interactions and nuances that enrich both the validity and depth of the results obtained. By offering a comprehensive view of human behaviour in its natural setting, participant observation in its two forms (outsider and technical observer, and peer observer) becomes an invaluable technique for nursing researchers. Mastery of this tool allows them to access detailed and meaningful information, essential to improve the understanding of social dynamics and clinical phenomena.

This article has been conceived with the aim of reflecting on the role of participant observation in nursing research, highlighting its essential characteristics and the value it brings to studies in this field.

In the text, the two main types of participant observation are described, informing how each model can be adapted to different research contexts and needs.

In addition, key recommendations have been offered for the design of observation instruments that allow for organised, accurate and relevant data collection. These suggestions aim to ensure that the data obtained are not only consistent and structured, but also useful for gaining a deeper understanding of the clinical phenomena and social dynamics observed. Ultimately, the article provides a practical and detailed guide for nurse researchers, focused on optimising the implementation of participant observation as a robust research technique.

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