

Supplementary File 2

Observing Civic Engagement Project

Selections from the

Coding Form Instructions for Research Assistants

Last Revised: January 10, 2019

Corresponds to OCE-SSOForm_v04.02

The following are items, categories, and coding definitions/instructions for items used in analysis in the paper “Space and Interaction in Civil Society Organizations: An Exploratory Study in a U.S. City.” Only items used in that paper are included here.

As described in the paper, our exploratory study analyzes data we collected for the first wave of the Observing Civic Engagement project. Over the course of the exploratory study, some items, categories, and definitions changed in response to observer feedback and inter-coder reliability checks. Here we include only the final versions.

For more information about the study, including these or other items, please contact the authors.

SET UP AND SPACE

Convening Type – Many things can happen during a meeting, but this is the **primary purpose** of the convening. What is the **main reason** they decided to hold this convening? Most meetings should be of 1 or 2 convening types.

Business meeting: a meeting whose main purpose is to discuss the business of running the organization such as what events to hold, how to raise money for the organization, how to recruit new members etc. A board meeting is the typical example of this.

Often, organizational business will be discussed at other events. So, Midtown may hold a potluck where people end up discussing some org business. Unless the org business was an explicit and pre-planned portion of the convening, we wouldn't select business meeting.

Member-benefit activity: a meeting which is held for the explicit purpose of benefiting members (and possibly others). For example, a meeting teaching people how to write grant proposals or run a small business, or a meeting aimed at giving members networking opportunities.

Other activity: a meeting whose main purpose is an activity whose main aim is not to benefit members, but something else. For example, painting a mural, collecting donations, fundraising, or holding a protest/march.

Rehearsal/practice: a meeting whose main purpose is to prepare or practice for an upcoming performance or game.

Performance/game: a meeting whose main purpose is performing or playing a game for an audience.

Recruitment/call-out: a meeting whose main purpose is to recruit new members and/or a “call-out” convening to start the quarter.

Social/recreational: a meeting whose main purpose is socializing and having fun.

Other convening type: Any other type of convening.

Note: In the paper, intended interaction includes social activity, member benefit, and business meeting convening types.

Outdoors?

Outdoors: Location of convening is outdoors.

Indoors: Location of convening is indoors.

Both: Convening was held partly indoors and partly outdoors

Note: In the paper, all three outdoors categories were combined into a single category.

Room size – If convening is held indoors. Indicate the size of the room(s). If the venue has an open floor plan, code the amount of useable space. An open plan where lots of the open space is not useable because it’s full of cubicles should not be coded as large because most of the space is unusable. But a card table at center court of a basketball arena is coded as large, even if the conveners don’t use most of the space.

Large (auditorium): suitable for very large gatherings (100+), like an auditorium or gymnasium.

Medium (function room): not suitable for very large gathering, but still capable of holding a substantial number of participants (26-99), like a lecture hall or a racquetball court.

Small (meeting room): suitable for a modest number of participants (11-25), like a meeting room.

Intimate (office): suitable for no more than about 10 people, like a living room or office

Note: In the paper, intimate and small were combined into a single category.

Space Access – This should not be confused with how the space is being used during the convening being observed. This is strictly in reference to the nature of the space, not its current usage, which could be different. Another item will cover the exclusivity of the convening. This item only looks at the space itself. This way we can see when the space is incompatible with its current use (i.e. trying to have a private meeting in a fully public setting).

Convener-controlled: The convener (hosting organization) has control over who can enter the space and who cannot. They have the ability to keep unwanted people out.

Uncontrolled: The convener (hosting organization) does not have control over who can enter the space. They do not have the ability to keep unwanted people out. For example, a coffee shop or hotel lobby.

Both (multiple spaces): The convening was held in both a space that was convener-controlled AND a different space that was uncontrolled.

Note: In the paper, both was combined with convener-controlled into a single category.

Exclusivity – who is allowed to attend?

Private, specific people: A convening that intentionally excludes individuals who are not explicitly invited or expected to attend (e.g., a restricted board meeting or member only event).

Excludable Public, people who buy a ticket or register: A convening where there is meaningful separation between those who are allowed to attend and those who are not, but no restriction on which individuals have the ability to gain access. Generally, excludable public events are ticketed in some way (whether with actual tickets or a pre-registration list), but anyone is allowed to get a ticket. For example, a movie or concert would be excludable public since you need a ticket but anyone can buy one.

Fully Public, anyone: A convening that is fully open to the public, expressed either through explicit voicing (“all are welcome”) or implicit lack of restriction and strategic placement (e.g. A fair).

Note: In the paper, private and excludable public were combined into a single indicator of restricted attendance (1) versus fully public (0).

TIMES AND COUNTS

Turnout Count at Start and End – Give the number of people there for the convening, and indicate whether it is an exact count (Ct.) or an estimate (Est.) Do not count virtual participants but do count anyone who is there for the convening, including staff, members, non-members, guests etc.

7 min before Scheduled start: The number of people present at 7 minutes before the scheduled start time

Scheduled start: The number of people present at the scheduled start of the convening

Actual start: The number of people present at the actual start of the convening.

Scheduled end: The number of people present at the scheduled end of the convening

Actual end: The number of people present at the actual end of the convening. If the convening ended on time, this will be the same as the count at scheduled end.

7 min after Actual end: The number of people present at 7 minutes after the actual end time

Pre/Post Convening Talk

People talking Before Start: Give the number of people engaged in extended conversation (more than introduction) before the convening starts.

People talking After End: Give the number of people engaged in extended conversation (more than goodbyes and “see you next time”) after the convening concludes.

Note: observers were instructed to conduct the pre/post talk counts at the same time they conducted the complete 7 minute pre/post counts.

Rolling Total Counts – For each of the categories below, give the total number who were present at some point during the convening and indicate if this number is an exact count or an estimate.

Staff: Give the total number of staff who at some point were present at the convening. These are only staff of the organization being observed,

NOTE – ONLY paid staff of the organization being observed count. Many organizations will have volunteers who lead and organize convenings and have official roles in the organization. But these are not staff unless they are paid employees. Otherwise, they should be coded as “participants.” Also, only staff for the organization we are observing count. Staff from other organizations may be there, but they would be “participants”

Participant (real life): Give the total number of participants who at some point were physically present at the convening. Participants include any non-staff who are there to participate in the convening. This includes guest speakers and volunteers.

Other belong (guard, waiter etc.): These are people who are in the convening space in their professional capacity and may interact with participants but would not be counted by the organization as “participating” in the convening. For example, members of the press, security guards, janitors, bus drivers, and waiters may be in the convening space to fulfil their job but are not participating in the convening. Do not confuse this with convening participants who choose to help serve food or act as ushers.

NOTE – This is the ONLY place in the form where you code for people who are not there to in some way attend the convening. For example, you will NOT code for janitors, security guards, waiters, venue staff, etc. in demographic counts, attire, or interactions.

Other random: These are people who just happen to be in the same space and who aren’t interacting with the convening in a professional capacity. For example, diners in the same restaurant or passengers on the same public bus. In very high-traffic public spaces, only code for people who interact with convening participants (for example by speaking with or bumping into participants).

CT: The number of people who were present, but you weren’t sure what their role was.

Virtual Participant: If you indicated that audio or video conferencing occurred, give the total number of people who were present via audio/video. If you are very unsure, enter “dk”, otherwise give an estimate. If a virtual participant at any point is physically present, code them as real-life participant only.

Note: In the paper, total participants is the sum of “staff” and “participant (real life).”

ACTIVITIES

Indicate whether the following activities occurred at the convening.

Business discussion: A discussion of organizational business or procedures occurs during the convening. For example, a plan of action or past organizational performance is discussed. This is not just a few mentions of organizational procedures, or one organizational member describing how the organization works to others. It must be a discussion where multiple participants give their input. There doesn't need to be a possibility of a decision being made, just people talking about organizational business. If something starts as a topical discussion, but ends in an organizational decision ("we will create a committee to respond to the issue") then this is a business discussion.

Topical discussion: A discussion of substantive topics related to the goals/values of the organization, but not focused on organizational activities related to those topics. The key here is that people are engaged in at least semi-structured talk about a substantive topic but are not planning or executing the organization's actions relative to that topic.

Examples: (1) A religious organization has a "reflection" where small groups discuss where they saw God in their lives during the past week; they are not developing a personal narrative to then use in public evangelism. (2) A chamber of commerce has a discussion about how tariffs caused by a trade war with China might affect local businesses; they are not discussing how the organization should respond.

Work Session: Doing mundane work for the organization. For example, stuffing envelopes, making food, drawing signs, drafting documents (by individuals or small groups; not wordsmithing by the full executive board – this would no longer be mundane).

Presentation or lecture: A presentation or lecture before an audience. This includes presentations by panels. This refers to the format. For example, a PowerPoint presentation in which someone reports their committee's work for the quarter is a presentation, even if it is not an informative lecture.

Note – if a business meeting includes both business discussion and a presentation, select both. For example, an executive board meeting might be structured around discussion of various organizational issues and then in the middle the finance director gets up and gives a 7-minute presentation on the state of the organization's finances. When she sits down, the board then talks about finance. This gets coded as a business discussion and a presentation. The same could be true of topical discussions. If a member in a vegetarian group stands up and gives a presentation on easy vegetarian substitutes for chicken in recipes, and then when he sits down the group talks about their favorite chicken-substitute dishes, then it gets coded as presentation/lecture and topical discussion.

Audience Q&A: A higher level of participation from the audience (than in a typical performance or lecture) where the audience asks questions of an individual or panel.

This is a relatively high bar. It's not "are there any questions?" It's "and now we'll take questions from the audience." If the former turns into the latter, it still counts as Q&A (i.e. pre-planning isn't required), but a couple follow up questions after a presentation is either business or topical discussion, not audience Q&A.

Rehearsal or practice: Practice activity or performance in preparation for future activity, including athletic practices, choir rehearsals, etc.

Arts performance or display: An artistic performance or exhibit, where the purpose is to experience and appreciate art. For example, a play, musical, art exhibit, concert, art film.

The performance or display should be in its final form for the intended audience. So, a dress rehearsal for a musical where a few cast members' families are invited to watch is still a rehearsal. The performance is when they put on the show for their intended audience. However, revealing a portion of a complete work to an intended audience counts as a performance. So, if the cast of a musical sings a number on stage at a community event in a park, it counts as a performance though they aren't doing the whole show.

Game or contest: Interactive play of a competitive nature is taking place, based on athletic ability (e.g., sports games, races), strategy (e.g., board games), luck (e.g., bingo), knowledge (e.g., trivia) or other skills.

Service volunteering: Service volunteering for some charitable cause, initiative, or endeavor.

Fundraise (any source): Raising money/resources for either the organization or others, including fund-drives or campaigns, applying for grants, soliciting donations, selling merchandise, selling tickets, raising annual dues, selling advertising space, accepting corporate sponsorship, etc.

Give grants (external): The organization gives money to other groups/people.

Write/publish ideas: An activity whose purpose is to create and disseminate informational material related to or generated by the group (e.g., leaflets, newsletters, press releases, websites, Facebook posts, letters to the editor).

Press conference: The organization arranges for the press to be present so that they can give an interview and express their views. This does not count if the press just happen to show up, it needs to be an explicit purpose of the convening.

Meet with decision-makers: The organization arranges to meet with individuals or organizations that they see as having decision-making power over an issue. For example, meeting with elected officials about an upcoming vote or meeting with a CEO to discuss changes in company policy. Decision-makers are the *audience/content consumers*.

Protest: A public activity whose explicit purpose is to express support or disagreement with an individual or issue. Examples: women's march, gay pride parade, protesting outside senator's office, sit-in, picketing planned parenthood etc.

Entertainment (non-interactive): An activity carried out just for entertainment/fun which does not involve participant interaction. For example, watching a movie.

Team building (formal): An activity whose explicit purpose is to create camaraderie, fellowship, or relationship among the members (e.g., "now let's do a team building exercise").

Networking: A part of the convening is explicitly and officially set aside for networking.

Socializing: Talk among attendees of a general, non-organization-specific, informal, social variety. Chit-chat, small-talk, gossip, and friendly conversation.

Collective religious music or recitation: Collectively singing or playing religious music, or recitation of religious text such as prayer. It is religious if the text/song is religious, no matter who is singing/saying/playing. Singing "Joy to the World" is religious, no matter who is singing it. Singing "Frosty the Snowman" is secular, no matter who is singing it.

Collective secular music or recitation: Collectively singing or playing secular music, or recitation of secular text such repeating a reflective mantra.

Collective movement (march, run, dance): An activity which involves participants moving collectively, such as dancing, parading, marching, playing soccer etc. Note, this should be an activity with substantial movement, not just walking to and from the lunch table. If a rehearsal/practice or game/contest includes collective movement, select both.

Celebrate member: An activity celebrating of an individual member, such as 10 years membership, a birthday, or an individual achievement. This must be premeditated and significant, an activity you would put on the agenda for the convening such as a party or award ceremony. Someone thanking someone else for their hard work is not enough. It is common for people to list accomplishments when introducing speakers. This is not

necessarily celebrating member. The point of listing accomplishments must be to recognize and compliment a member because of those actions rather than ritual introduction or establishing a speaker's bona fides.

Celebrate organization: An activity celebrating the organization's achievement, such as a celebration of its anniversary or of reaching some organizational goal. This must be premeditated and significant, an activity you would put on the agenda for the convening such as a party or award ceremony. Someone making a passing mentioning of the organization's success or thanking the assembled members for their effort in a just-completed activity is not enough.

Celebrate others (ind or org): An activity celebrating an outside organization or individual(s). This must be premeditated and significant, an activity you would put on the agenda for the convening such as a party or award ceremony. Someone mentioning the outsider's success in passing or thanking them for their effort is not enough.

Celebrate holiday/culture: An activity whose main purpose is to celebrate a holiday or culture. This could be a holiday that all participants share (e.g., New Year's Day, 4th of July) or a holiday that is distinctive to subsets of participants (e.g., religious holidays or heritage/ethnicity-based holidays such as Chinese New Year or Cinco de Mayo).

Other activity: Does not appear above; please specify.

Note: In the paper, socializing is the variable used for informal talk during the convening.