

## Planning your evaluation

Sarah-Jane Harknett

Museums are increasingly being asked to prove our value to society in robust ways. In the University of Cambridge Museums, we believe that evaluation is strongest and at its most effective when we use the most appropriate methods for both the audience and output. Some of our evaluation and audience development work continues throughout the year, sometimes we do more intensive evaluation. We use proportionate methods, which are based on what the project is, the timescale and timeline, audiences (both existing and potential), the budget, measures of success, and the change the evaluation can bring. Through all our work, we want to make sure museums and galleries are still spaces to be enjoyed, we don't want our visitors to feel that they are being studied. We usually carry out evaluation at different times in the life of a project:

**Front end:** this is the evaluation that happens before a project starts, perhaps testing what an audience knows about a topic, their attitude towards something or getting baseline data. It might take place before an audience is finalised, when we are working out who the activity should be aimed at.

**Formative:** this is ongoing testing and evaluation that takes place before something is finished. Perhaps we have had the initial idea and we want to do some user testing before we decide on the final version, for example, testing exhibition interactives.

**Summative:** this evaluation takes place at the end of the work, when nothing can be changed, but when you are trying to see what the impact of the final product has been on the intended audiences, whether the work met the original aims and objectives. This is the most common method of evaluation in museums.

The tools and methods you use will change depending on the audiences you are working with and what you are evaluating. You will probably want to choose two or more methods to evaluate the activity. This is called triangulation and should improve the validity of claims that you draw from your evaluation data. At the end of this resource is additional information about different evaluation methods, looking at their advantages, disadvantages, time needed, inputs and outputs. Here are some suggestions of different ways to evaluate either staff or participants for various museum activities:

Exhibitions	Public/Participants	Staff
Front end	Focus groups User panel	Focus groups Feedback survey
Formative	Focus groups Interviews User panel	Focus groups Interviews
Summative	Feedback survey Visitor observation Interviews	Feedback survey Interviews Reflective journalling



## Impact Evaluation Resources

<b>Events</b>	Public/Participants	Staff
Front end	Focus groups User panel	Focus groups Feedback survey
Formative	Focus groups Interviews User panel	Focus groups Interviews
Summative	Feedback survey Visitor observation Interviews	Feedback survey Interviews Reflective journalling

<b>Programming</b>	Public/Participants	Staff
Front end	Focus groups User panel	Focus groups Feedback survey
Formative	Focus groups Interviews User panel	Focus groups Interviews
Summative	Feedback survey Visitor observation Interviews	Feedback survey Interviews Reflective journalling

<b>Digital activity</b>	Public/Participants	Staff
Front end	Focus groups User panel	Focus groups Feedback survey
Formative	Focus groups Interviews User panel	Focus groups Interviews
Summative	Feedback survey Visitor observation Interviews	Feedback survey Interviews Reflective journalling

Once you have decided on the methods that you are going to use, you will need to plan out your timeline. Below is an example timeline for an exhibition where the evaluator is planning to use surveys and visitor observation with members of the public:

<b>Example Exhibition Evaluation Timeline</b>		<b>Days</b>
The earlier the better.	Plan evaluation, create timetable, design evaluation tools (write survey, create visitor observation sheet)	5
Exhibition opens. Data collection phase.	Surveys	5
	Visitor observation	10
After exhibition closes	Data analysis and reporting	15
<b>Total</b>		<b>35</b>

## Impact Evaluation Resources

### Further reading and other resources

- Judy Diamond, *Practical Evaluation Guide: tools for museums and other informal educational settings*, AltaMira Press, 1999.

If you are looking for an easy-to-read, museum-relevant guide to evaluation, this is an excellent introduction. Judy covers planning, selecting people for the evaluation, observation, interviews, questionnaires, presenting and analysing data and writing the report. She uses museum examples throughout, mainly from science collections. There is further recommended reading section at the end. The book is showing its age a little, but it is still an excellent starting point for a simple overview.

- Barry Lord, Gail Dexter Lord, Maria Piacente *The Manual of Museum Exhibitions*, AltaMira Press, 2002.

There are a few versions of this available (cheaper copies of the earlier versions are available second hand online), but the chapter on evaluation with sections by Duncan Grewcock and Barbara Soren is well-worth a read to gain a helpful overview of exhibition evaluation.

- National Co-ordinating Centre for Public Engagement (NCCPE) website, especially the guide to 'Using a logic model to develop your strategy':  
<https://www.publicengagement.ac.uk/resources/guide/using-logic-model-develop-your-strategy>

To plan your evaluation, you might decide to use a logic model. Some funders are now asking for these as part of your application. If you are new to planning with logic models, this guide by Mary-Clare Hallsworth will walk you through the process step-by step. There is a worked example, which although not museum-relevant is broad enough to still be useful.

- Case studies on the websites of The British Museum, The Natural History Museum, and University of Cambridge Museums.

One of the most useful ways to learn about evaluation is to examine case studies from other museums to see what works, what you like and what you think it not so useful. The British Museum has a 'visitor research and evaluation' section on their website, with mostly summative exhibition evaluation reports, usually written by consultants. The Natural History Museum's website has an 'audience research and insight' page, with downloadable pdfs of literature reviews and some more specific reports on activities and events. Some of these are over ten years old, and at the moment the page doesn't appear to be updated regularly. The UCM Collections in Action website includes a section on resources, where evaluation support can be found. The blog also is regularly updated with evaluation reports.

- Ben Gammon and Jo Graham, 'Putting value back into evaluation', *Visitor Studies Today!* Volume 1, 1998, pp 6-8.

This short article looks the barriers that organisations (in this case, The Science Museum) face around embedding evaluation into what they do. The authors provide some practical ideas of things that audience advocates can do to bring all museum staff on the evaluation journey. A thought-provoking read.

## Suggested Evaluation Methods

Activity	Inputs	Process	Outputs (Action/item to achieve outcome)	Outcomes (What will it achieve; the difference that is made)	Advantages	Disadvantages	Time requirements (high/med/low)	Recommended applications
<b>Feedback Survey</b>  UCM Evaluation Resource available	<ul style="list-style-type: none"> <li>Paper survey questionnaires designed to collect demographic data and responses specific to the exhibition, event, or programme</li> </ul>	<ul style="list-style-type: none"> <li>Paper surveys positioned for maximum audience impact/attention or handed directly to participants</li> <li>Survey data entered by staff/volunteers if paper-based</li> </ul>	<ul style="list-style-type: none"> <li>Qualitative and quantitative evidence relevant to the evaluation aims</li> <li>Demographic audience data</li> </ul>	<ul style="list-style-type: none"> <li>Improved understanding of impact</li> </ul>	<ul style="list-style-type: none"> <li>If handed out, can use a sampling strategy</li> <li>Can collect both qualitative and quantitative data</li> <li>User Familiarity</li> <li>Large scale data collection is possible</li> </ul>	<ul style="list-style-type: none"> <li>Transcribing data is time consuming</li> <li>Cannot check meaning of responses</li> <li>User over-familiarity might lead to low response rate</li> <li>Requires literacy skills</li> <li>Environmental implications with paper-based methods</li> </ul>	Staff/volunteer training: Low  Data collection: Medium  Analysis: Medium	<ul style="list-style-type: none"> <li>Exhibitions</li> <li>Events with defined audience</li> <li>Front end, formative and summative</li> <li>Formal and informal learning</li> </ul>
	<ul style="list-style-type: none"> <li>Digital survey questionnaires designed to collect demographic data and responses specific to the exhibition, event, or programme</li> </ul>	<ul style="list-style-type: none"> <li>Audience/ participants given link to digital survey or use a tablet loaded with the survey</li> <li>Responses entered as part of the questionnaire process: no additional input</li> </ul>			<ul style="list-style-type: none"> <li>Can collect both qualitative and quantitative data</li> <li>User Familiarity</li> </ul>	<ul style="list-style-type: none"> <li>Harder to impose a sampling strategy</li> <li>Lower response rates</li> <li>Cannot check meaning of responses</li> <li>User Familiarity</li> </ul>	Staff/volunteer training: Low  Data collection: Medium  Analysis: Medium	

Activity	Inputs	Process	Outputs	Outcomes	Advantages	Disadvantages	Time requirements	Recommended applications
<b>Visitor Tracking and Observation</b>  UCM Evaluation Resource available	<ul style="list-style-type: none"> <li>Information about audience behaviour in the exhibition, how long they spend looking at the exhibits, displays interpretation and interactives.</li> </ul>	<ul style="list-style-type: none"> <li>Trained evaluators (staff or volunteers) recruited to carry out visitor tracking surveys</li> <li>Managed by a staff member</li> <li>Volunteers will complete visitor tracking surveys</li> <li>Data uploaded and interpreted</li> </ul>	<ul style="list-style-type: none"> <li>Qualitative and quantitative evidence relevant to the evaluation aims</li> </ul>	<ul style="list-style-type: none"> <li>Improved understanding of how visitors engage with exhibition content</li> <li>Improved understanding of how to make exhibitions more impactful</li> </ul>	<ul style="list-style-type: none"> <li>Can get an idea of how a display space is being used practically</li> <li>Can impose sampling strategy</li> <li>Can observe the behaviour of different audiences</li> <li>No literacy or language skills required</li> </ul>	<ul style="list-style-type: none"> <li>Don't know why people are stopping/engaging</li> <li>Need clear ethical statement</li> <li>Environmental implications with paper-based methods</li> </ul>	Staff/volunteer training: Medium  Data collection: High  Analysis: High	<ul style="list-style-type: none"> <li>Permanent displays</li> <li>Temporary exhibitions</li> <li>Static events</li> <li>Formative or summative</li> </ul>
<b>Accompanied Visits</b>  UCM Evaluation Resource available	<ul style="list-style-type: none"> <li>Questions and talking points designed to prompt conversations</li> </ul>	<ul style="list-style-type: none"> <li>Liaison with participants to arrange a suitable time and date</li> <li>Evaluator accompanies the participants and will note and record their responses to the different exhibits as they walk around, providing a detail account of individual experiences and noting any changes in thinking or attitude.</li> </ul>	<ul style="list-style-type: none"> <li>Qualitative evidence relevant to the evaluation aims</li> <li>Transcriptions and records of conversations and interactions</li> </ul>	<ul style="list-style-type: none"> <li>An understanding of how participants engage with exhibition content</li> <li>Feedback and observations from individuals or small groups</li> </ul>	<ul style="list-style-type: none"> <li>Opportunity to see a natural visit</li> <li>Immediate feedback</li> <li>Can use a sampling strategy</li> <li>Can get in depth feedback</li> <li>Can use with specific audiences</li> <li>Can look at specific aspects of exhibitions/event</li> </ul>	<ul style="list-style-type: none"> <li>Small sample size</li> <li>Could be biased if a member of staff or volunteer accompanies the group</li> </ul>	Staff/volunteer training: Med  Data collection: High  Analysis: High	<ul style="list-style-type: none"> <li>Permanent displays</li> <li>Temporary exhibitions</li> <li>Events</li> <li>Programmes aimed at specific audiences</li> <li>Formative and summative</li> </ul>

		<ul style="list-style-type: none"> <li>The evaluator will try not to influence the visit, allowing the visitors to have as natural an experience as possible</li> </ul>						
Activity	Inputs	Process	Outputs	Outcomes	Advantages	Disadvantages	Time requirements	Recommended applications
<b>Ticketing numbers</b>	<ul style="list-style-type: none"> <li>Numbers of people attending</li> </ul>	<ul style="list-style-type: none"> <li>Actual number of attendees to an event, exhibition or programme is recorded</li> </ul>	<ul style="list-style-type: none"> <li>Quantitative data on attendees</li> </ul>	<ul style="list-style-type: none"> <li>Improved understanding of periods visitors are most likely to visit</li> </ul>	<ul style="list-style-type: none"> <li>Simple</li> <li>Quick</li> <li>Cheap</li> <li>No literacy or language skills required</li> </ul>	<ul style="list-style-type: none"> <li>Very limited information</li> </ul>	<p>Staff/volunteer training: Low</p> <p>Data collection: Low</p> <p>Analysis: Low</p>	<p>Almost everything with an audience</p> <ul style="list-style-type: none"> <li>Exhibitions</li> <li>Events</li> <li>Activities with specified audience</li> <li>Activities for an undefined audience</li> <li>Summative</li> <li>Formal and informal learning</li> </ul>
Activity	Inputs	Process	Outputs	Outcomes	Advantages	Disadvantages	Time requirements	Recommended applications
<b>Reflective journaling</b> UCM Evaluation Resource available	<ul style="list-style-type: none"> <li>Information held in reflective journals, either physical or digital</li> </ul>	<ul style="list-style-type: none"> <li>Participants record their thoughts, sometimes responding to prompts, over the life of a project</li> </ul>	<ul style="list-style-type: none"> <li>Qualitative evidence relevant to evaluation aims</li> <li>Long form, reflective text</li> </ul>	<ul style="list-style-type: none"> <li>Retrospective identification of issues and successes in projects</li> <li>Deeper understanding of</li> </ul>	<ul style="list-style-type: none"> <li>Longitudinal data over the course of a project, from instigation to completion and beyond</li> </ul>	<ul style="list-style-type: none"> <li>Relies heavily on participant remembering to complete</li> <li>No standard questions might mean important</li> </ul>	<p>Staff/volunteer training: Low</p> <p>Data collection: Medium</p> <p>Analysis:</p>	<ul style="list-style-type: none"> <li>Long-term projects</li> <li>Adults</li> <li>Participatory programmes</li> <li>Community engagement</li> </ul>

				process and change	<ul style="list-style-type: none"> <li>Rich data which can respond to project alterations</li> <li>Good at capturing processes as well as outcomes</li> <li>Can be used by both project organisers and audience</li> </ul>	information is lost <ul style="list-style-type: none"> <li>Requires literacy skills</li> </ul>	High	<ul style="list-style-type: none"> <li>Activities with specified audiences</li> <li>Evolving projects</li> <li>Formative and summative</li> </ul>
<b>Interviews</b>  UCM Evaluation Resource available	<ul style="list-style-type: none"> <li>Questions designed to collect responses specific to the exhibition, event, or programme being evaluated</li> </ul>	<ul style="list-style-type: none"> <li>Interviewees are approached for convenient time slots</li> <li>Interview takes place, responses recorded</li> </ul>	<ul style="list-style-type: none"> <li>Qualitative data relevant to evaluation and project aims</li> </ul>	<ul style="list-style-type: none"> <li>Improved understanding of project</li> <li>In depth understanding</li> </ul>	<ul style="list-style-type: none"> <li>Can get in depth feedback</li> <li>Possible to repeat interview process for longitudinal studies</li> <li>With suitable permissions, can use method with children</li> <li>Does not require literacy skills</li> <li>Can use a sampling strategy</li> </ul>	<ul style="list-style-type: none"> <li>Requires language skills from both interviewer and interviewee</li> <li>Need skilled interviewer to reduce bias and elicit responses</li> <li>Transcription is time consuming</li> <li>Can provide a large body of evidence, which can be time-consuming to analyse</li> </ul>	Staff/volunteer training: Med  Data collection: High  Analysis: High	<ul style="list-style-type: none"> <li>Long-term projects</li> <li>Short-term projects</li> <li>Evolving projects</li> <li>Exhibition process</li> <li>Front end, formative and summative</li> <li>Exhibition (summative)</li> <li>Formal and informal learning</li> </ul>
<b>Activity</b>	<b>Inputs</b>	<b>Process</b>	<b>Outputs</b>	<b>Outcomes</b>	<b>Advantages</b>	<b>Disadvantages</b>	<b>Time requirements</b>	<b>Recommended applications</b>
<b>Creative outputs</b>	<ul style="list-style-type: none"> <li>Drawings or other creative content (collage,</li> </ul>	<ul style="list-style-type: none"> <li>Participants asked to produce their own creative response to a provocation.</li> </ul>	<ul style="list-style-type: none"> <li>Analysis of the creative content; qualitative data</li> </ul>	<ul style="list-style-type: none"> <li>Impact of an engagement, especially from groups that may</li> </ul>	<ul style="list-style-type: none"> <li>Does not always need literacy skills</li> </ul>	<ul style="list-style-type: none"> <li>Can be difficult to interpret</li> <li>Environmental implications</li> </ul>	Staff/volunteer training: Medium	<ul style="list-style-type: none"> <li>Formative and summative</li> <li>Participatory programmes</li> </ul>

# Impact Evaluation Resources

<p>UCM Evaluation Resource available</p>	<p>photographs, artworks, etc)</p>	<ul style="list-style-type: none"> <li>• They may be asked supporting questions or to provide a commentary</li> </ul>		<p>struggle with other evaluation methods</p>	<ul style="list-style-type: none"> <li>• Can engage a wide range of audiences</li> <li>• Can be used for long-term projects</li> </ul>	<p>with paper-based methods</p>	<p>Data collection: Medium</p> <p>Analysis: High</p>	<ul style="list-style-type: none"> <li>• Community engagement</li> <li>• Activities with specified audience</li> <li>• Work with children and young people</li> <li>• Permanent and temporary exhibitions</li> <li>• Events</li> <li>• Formal and informal learning</li> </ul>
<p><b>Meaning maps</b></p> <p>UCM Evaluation Resource available</p>	<ul style="list-style-type: none"> <li>• Words, drawings, or other creative content in response to a theme word, phrase, or image</li> </ul>	<ul style="list-style-type: none"> <li>• Participants given paper with central theme and asked to write or draw their responses</li> <li>• They may be asked to talk about or elaborate upon their responses</li> <li>• The same meaning map can be used before and after an intervention, using different coloured pens</li> </ul>	<ul style="list-style-type: none"> <li>• Analysis of the creative content; qualitative data</li> <li>• Comparison of responses before and after an intervention</li> </ul>	<ul style="list-style-type: none"> <li>• Impact of a specific engagement on a particular theme</li> </ul>	<ul style="list-style-type: none"> <li>• When used before and after an experience can be used to measure changes</li> <li>• Younger audiences have some familiarity with technique</li> <li>• Responses can be written or drawn</li> </ul>	<ul style="list-style-type: none"> <li>• Can be difficult to interpret</li> <li>• Environmental implications with paper-based methods</li> </ul>	<p>Staff/volunteer training: Medium</p> <p>Data collection: Medium</p> <p>Analysis: High</p>	<ul style="list-style-type: none"> <li>• Summative</li> <li>• Permanent and temporary exhibitions</li> <li>• Work with children and young people</li> <li>• Formal and informal learning</li> </ul>
<p><b>Activity</b></p>	<p><b>Inputs</b></p>	<p><b>Process</b></p>	<p><b>Outputs</b></p>	<p><b>Outcomes</b></p>	<p><b>Advantages</b></p>	<p><b>Disadvantages</b></p>	<p><b>Time requirements</b></p>	<p><b>Recommended applications</b></p>
<p><b>Focus groups</b></p> <p>UCM Evaluation Resource available</p>	<ul style="list-style-type: none"> <li>• The experiences of a group of people brought together to discuss a specific aspect of museum practice.</li> </ul>	<ul style="list-style-type: none"> <li>• Group of people brought together to discuss a topic.</li> <li>• Participants identified and recruited, ideally</li> </ul>	<ul style="list-style-type: none"> <li>• Qualitative data</li> <li>• Responses of a group of small people</li> </ul>	<ul style="list-style-type: none"> <li>• In depth data about a specific topic</li> <li>• Improved understanding of project</li> </ul>	<ul style="list-style-type: none"> <li>• Good to find out opinions of specific audiences</li> </ul>	<ul style="list-style-type: none"> <li>• Requires skilled facilitators</li> <li>• Some voices may still dominate</li> </ul>	<p>Staff/volunteer training: High</p> <p>Data collection: Med</p>	<ul style="list-style-type: none"> <li>• Long-term projects</li> <li>• Evolving projects</li> <li>• Exhibition process</li> </ul>

		<p>with some common ground between them. They may be users or non-users.</p> <ul style="list-style-type: none"> <li>Facilitated conversation session, usually using prompts on the subject in question</li> </ul>		<ul style="list-style-type: none"> <li>Contributions from more than one person</li> </ul>	<ul style="list-style-type: none"> <li>Can clarify points with the group</li> <li>Depth of information</li> <li>Can be planned to not require literacy skills</li> </ul>	<ul style="list-style-type: none"> <li>Transcription is time consuming</li> <li>Requires good language skills from participants</li> <li>Can provide a large body of evidence, which can be time-consuming to analyse</li> <li>Care is needed when recruiting and during the focus group to ensure the process is equitable</li> <li>Recruitment can be difficult and time-consuming</li> </ul>	<p>Analysis: High</p>	<ul style="list-style-type: none"> <li>Best for front end and formative</li> <li>Community groups</li> <li>Children and young people</li> <li>Families</li> </ul>
Activity	Inputs	Process	Outputs	Outcomes	Advantages	Disadvantages	Time requirements	Recommended applications
<p><b>User panel</b> UCM Evaluation Resource available</p>	<ul style="list-style-type: none"> <li>The experiences of a group of people brought together over a period of time to discuss a specific aspect of museum practise.</li> </ul>	<ul style="list-style-type: none"> <li>Group of people from current audiences brought together to discuss issues</li> <li>Group will be called upon frequently and regularly</li> </ul>	<ul style="list-style-type: none"> <li>Qualitative data</li> <li>Responses of a group of small people over longer period of time</li> </ul>	<ul style="list-style-type: none"> <li>Improved understanding of participant views and feelings</li> </ul>	<ul style="list-style-type: none"> <li>Can get in-depth feedback over longer period of time</li> <li>Opportunity to create good relationships with panel and the communities they represent</li> </ul>	<ul style="list-style-type: none"> <li>Might become stale, an audience echo chamber</li> <li>Can provide a large body of evidence, which can be time-consuming to analyse</li> <li>Requires skilled facilitators</li> </ul>	<p>Staff/volunteer training: High</p> <p>Data collection: High</p> <p>Analysis: High</p>	<ul style="list-style-type: none"> <li>Long-term projects</li> <li>Evolving projects</li> <li>Exhibition process</li> <li>Front end, formative and summative</li> <li>Community groups</li> <li>Family groups</li> <li>Young people</li> </ul>

					<ul style="list-style-type: none"> <li>• Can clarify points</li> <li>• Good way to test out specific outputs (marketing materials, text, etc)</li> </ul>	<ul style="list-style-type: none"> <li>• Requires good language skills from participants</li> <li>• Care is needed when recruiting and during the focus group to ensure the process is equitable</li> <li>• Recruitment can be difficult and time-consuming – even more so than with focus groups</li> </ul>		
Activity	Inputs	Process	Outputs	Outcomes	Advantages	Disadvantages	Time requirements	Recommended applications
Comments books/ post-it notes	<ul style="list-style-type: none"> <li>• Short (usually written) responses from members of the public</li> </ul>	<ul style="list-style-type: none"> <li>• Printed comments cards or notebooks and writing implements available (or can be digital)</li> <li>• Prompt questions can be used</li> </ul>	<ul style="list-style-type: none"> <li>• Generally, provides qualitative data</li> <li>• Possible to get responses from all participants</li> </ul>	<ul style="list-style-type: none"> <li>• Feedback on a specific event, exhibition, programme, or intervention</li> </ul>	<ul style="list-style-type: none"> <li>• Adaptable and open method</li> <li>• No special equipment needed</li> <li>• Can ask for drawings or other feedback</li> <li>• Little staff time required to implement</li> </ul>	<ul style="list-style-type: none"> <li>• No standard questions</li> <li>• Environmental implications with paper-based methods</li> <li>• No sampling strategy</li> <li>• Need regular monitoring</li> <li>• Potential for high volume of off-topic content</li> <li>• Prompt question should</li> </ul>	<p>Staff/volunteer training: Low</p> <p>Data collection: Low to Med</p> <p>Analysis: Med to High</p>	<ul style="list-style-type: none"> <li>• Permanent displays</li> <li>• Temporary exhibitions</li> <li>• Events</li> <li>• Programmes aimed at specific audiences</li> <li>• Summative</li> <li>• Formal and informal learning</li> </ul>

Activity	Inputs	Process	Outputs	Outcomes	Advantages	Disadvantages	Time requirements	Recommended applications
<b>Analysis and Reporting</b>	<ul style="list-style-type: none"> <li>• Outputs of all data collection strands</li> <li>• Comparison to previous reports and tracking studies</li> <li>• Records of data collection and exhibition information</li> </ul>	<ul style="list-style-type: none"> <li>• Content analysis of outputs, uncovering key themes and patterns in relation to aims</li> <li>• Description of the results and development of conclusions and implications</li> <li>• Develop clear action and learning points</li> <li>• Produce and circulate full report</li> </ul>	<ul style="list-style-type: none"> <li>• Full written report and executive summary</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation findings enhance understanding of impact and inform reporting and future planning</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunity to disseminate information to stakeholders and decision makers</li> </ul>	<p>be carefully chosen</p> <ul style="list-style-type: none"> <li>• Requires literacy skills</li> <li>• Often people who feel the most strongly (positive or negative) who complete</li> </ul>	<p>Staff/volunteer training: Low-High</p> <p>Data collection: Low-High</p> <p>Analysis: Low-High</p>	<ul style="list-style-type: none"> <li>• All applications</li> <li>• All audiences</li> </ul>

# Surveys and Asking Questions

Sarah-Jane Harknett

Surveys or questionnaires are probably the most used method of evaluation. They are flexible, quick to create, cheap to deliver, can be paper-based, digital or both, and a careful combination of questions can give you useful qualitative and quantitative evidence as well as demographic data about the audience. Surveys can provide evaluation data for a large exhibition, one case or a single object. A survey is often completed without input or intervention from an evaluator and so are limited to a predetermined set of questions.

## How to do it

- Write your questions.

For demographic questions, check what is standard in your field or nationally recognised. For example, you might want to align your age categories with those used by Arts Council England or use the guidance from Stonewall on sexual orientation and gender identity. Only ask for demographic information that is relevant and that you can use in your analysis. Don't choose categories that are too big, this often happens in age categories, for example try to avoid using catch all ages such as '65+'.

Use a variety of questions: open-ended, closed, free text, rating scales, etc. See the Ben Gammon document in the Further Reading section for a helpful guide to different sorts of questions. There is disagreement in the literature over whether you should have scale questions with an odd or even number of points. A scale with an odd number (1 to 5 for example) gives respondents the opportunity to give a neutral response by putting themselves in the middle, a scale with even numbers (such as 1 to 10) forces people to have an opinion one way or the other, however marginally. All closed and scale questions should include an option for don't know, no opinion, not applicable, or prefer not to say (particularly if you are asking for potentially sensitive information).

	The lowest level I would find acceptable is		The level I ideally want is		I feel the level currently provided is		N/A
	Low	High	Low	High	Low	High	
10) Making electronic resources accessible from my home or office	○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		<input type="checkbox"/>
11) Quiet space for individual work	○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		<input type="checkbox"/>
12) Staff who instil confidence in users	○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		<input type="checkbox"/>
13) Adequate opening hours	○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6 ○ 7 ○ 8 ○ 9		<input type="checkbox"/>

Figure 1: Example survey questions with odd number scale bars. It is not immediately obvious how to respond to each question: how many people will complete all 12 parts?

Don't ask more than one thing in each question. It is very easy to add clauses to questions that make them difficult to answer, or difficult to analyse. In Figure 1 the first question asks about accessing electronic resources, but the answer might be different for the home or the office. To avoid confusing the respondent and the final report, these should be two separate questions. Don't have too many questions: the more questions you ask, the more likely the participant is to leave the survey. Use questions with free text responses cautiously. People will quickly get tired of writing longer answers and you will not get better data with a greater number of questions. It should be possible to answer your question almost immediately. Try not to ask people for information that they do not have at the time or that they will need to gather from elsewhere. Don't ask people to

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respond on behalf of someone else, for example don't ask teachers to tell you what the students thought.

- Only ask questions that are relevant to your evaluation study.

This is especially important with demographic questions, which can appear invasive. Think carefully about how you will analyse and use the results of each question in your survey: you should have a clear reason to include it. Remember to ask some questions that allow for negative feedback.

- Balance the positive and negative questions.

Getting negative feedback from your evaluation participants can sometimes be difficult. In UCM, we have found that asking people to suggest three improvements to an exhibition, or to be specific in their criticism has given us the best results. If you have a series of questions where you are asking people to rate on a scale, you could consider whether some of these are positive, and some are negative. Sometimes respondents can end up giving the same response to each question without thinking, so switching the way you ask questions might help them slow down. Pilot your survey to make sure the questions are clear. See the UCL Museum Wellbeing Measures Toolkit (in Further Reading) for their 'Umbrellas' that use both positive and negative terms for the participant to rate on a scale of 1 to 5.

- Order your questions.

Put your questions in a sensible order: group them so that you take the person on a logical journey through the questionnaire. Some experts recommend putting demographic questions at the beginning of the survey, to ease people in gently. Others suggest you end with demographic questions, so that if people are tired, they have something easy and quick to end on. You could order the questions in the order of your event or exhibition if appropriate. In general, it is recommended that a survey moves from general questions to more specific ones, or from questions that are easy to answer at the beginning, with ones that require more thought or are more emotionally charged towards the end. Think about who the survey audience is and order your questionnaire appropriately.

- Check the design and logic.

If your survey is on paper it should be easy to read with numbered questions. Follow all the usual rules for creating an accessible print document: don't have sentences or questions that break over a page, don't hyphenate words over different lines, align text on the left text rather than centred or justified. Most digital survey software will allow you to add logic, so questions can be skipped if particular answers are given. Used carefully, this can help to avoid tiring your respondent by only giving them relevant questions, but don't use it as a way to have a long survey.

- Pilot the whole survey and/or individual questions.

Testing out your questions with a small sample of your intended audience is a crucial (but often overlooked) step. The more you test and refine your questions, the better your results will be and the more robust your data set. Piloting allows you to iron out ambiguities in wording, to check the survey logic and to avoid misunderstandings. Most of the time you will have no opportunity to ask follow-up questions as part of the survey process, so checking your questionnaire thoroughly increases your chances of getting reliable results. Piloting your survey should also be a chance for you to check that respondents understand multiple-choice answers in the same way, and that everyone fits into a category. It can be helpful to time people as they complete the survey. This will

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help you to approach your audience in the data collection phase, as you can genuinely tell them how long it will take.

- Collect the data.

Unless the audience you are evaluating is very small, you will need to survey a sample of the population. Work out how you will be sampling the audience and ensure you are not excluding anyone. You don't want to end up relying only on motivated people to fill your survey in. This will give you plenty of people who either loved or hated the experience you are evaluating, but not many of the people in the middle. Think carefully before offering incentives: you don't want to create a bias in the respondents your survey appeals to, and you shouldn't offer anything related to your venue.

You need to directly ask the audience you are evaluating. Don't ask people to speak on behalf of someone else, for example one person to do the survey to represent the group they visit with. If you are approaching people in person to fill in the survey, think about where you will be positioned, how you will present yourself and what you will say. Write a script so that all evaluators are using the same prompts.

## **Ethics, safety, and security**

All relevant museum and evaluation staff should be fully briefed on the evaluation project before it begins, especially if you are using a sampling strategy. There will probably be no reason for you to collect identifiable data as part of a survey, but your questions should maintain respondents' anonymity. See the GDPR template on the Practical Evaluation Tips website (in Further Reading) for an idea of how to collect the necessary permissions.

Anyone evaluating visitors should be ready to explain what they are doing and why. For a survey, the person asking the questions should know what is going to happen to the results and how quickly a report might be available. Information sheets for participants should be provided either physically, or as part of an online survey. If someone responding to the survey decides they would like to withdraw from the study, delete or destroy their survey. Online surveys should have the details of someone who can be contacted for any queries and should clarify when in the process participants can withdraw their participation. Decide in advance how you will handle any surveys which are not fully completed: will you use the responses that have been given or remove the survey if the participant does not reach the end?

## **What to do with the data**

If you have collected the data on paper, this will need to be transcribed into a spreadsheet. You can then create simple charts or graphs. Digital survey software will be able to do a lot of the analysis for you, usually creating charts or graphs automatically.

You will need to analyse free text questions separately. Immerse yourself in the answers by reading the responses to each question through several times before starting to draw conclusions. Look for repeating themes, words or emotions, or patterns in responses. Think about ways that you can back up the themes that you come up with from a questionnaire with other evaluation methods.

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Spend some time working out the format for your final report. How can you present the data in the most effective way possible? Remember your report has an audience, so communicate your conclusions in a way that is understandable and persuasive. This could be through different types of graphs, images, using colour or infographics.



Figure 2: A very simple infographic from the [UCM blog](#), summarising UCM visitor figures April to September 2022

## Cautions and caveats

A questionnaire is not a magic bullet for all your evaluation needs. They rely on people having good skills in the language the survey is written in. Depending on the distribution method, they can have a very low return rate, leading you to draw conclusions based on a tiny proportion of the audience. They are often the first method people turn to when evaluating, but your audience might be experiencing a level of 'survey fatigue'. Use questionnaires with care.

Surveys should include a mixture of questions to give you both quantitative and qualitative responses. Your final results should be standardised and comparable, within the population you are studying or before and after an experience. You should ensure you include enough free text questions so that you can dig into responses, but not so many that it is overwhelming. If people are filling in the survey without an evaluator, you may end up with incomplete surveys and you have no opportunity for follow up.

You can end up with a lot of data. This can be good but can also leave you with a lot of analysis to do (and transcription if you are collecting questionnaires on paper). Be realistic about what you will have time to do and don't ask more questions than you will have time to go through. Don't ask questions that are unnecessary. Before you ask people to complete your survey, check that each question has earned its place in your questionnaire. Will the response be helpful? Are you inviting people to complain or comment on things that you have no control over? Is that important?

Avoid leading questions. Don't assume that everyone is as excited about the specific area you are evaluating as you are. There can be a tendency to really drill down into responses in areas that people might have no knowledge or opinion. A questionnaire should not feel like a test, and you don't always need to ask 'why?'

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When writing your report, avoid putting together too many groups of responses for questions with a scale. For example, it is better to avoid putting together all the 'satisfied' and 'very satisfied' answers into one general positive category. If your scale only has five points, there could be quite some difference between these two answers.

## Further reading and other resources

- Ben Gammon, *Effective Questionnaires for All: A Step by Step Recipe for Successful Questionnaires*, Science Museum, 2001.

While not an academic article, this is a short, practical guide to the process of writing a questionnaire that will get you results. Parts of the document are showing their age (it is unlikely you will be sending out postal questionnaires, for example, and the further reading list is very short), but it is an easy read from an author with years of experience of successful survey design. This document is an excellent starting place for you to think through your survey, especially if you are evaluating a museum or exhibition.

- Caroline Jarrett, *Surveys That Work: A Practical Guide for Designing and Running Better Surveys*, Rosenfeld Media, 2021.

This book is a clear and accessible guide to help with all your survey needs. Working logically, it takes you through your survey goals, sampling, how to write a good question and build that into a questionnaire, and what to do with the data, concluding with a helpful list of further reading. Highly recommended.

- Felicity A. McDowall, 'Lost in Temporal Translation: A Visual and Visitor-Based Evaluation of Prehistory Displays', *Antiquity*, 97.393, 2023, pp. 707-25.

A thorough investigation into visitor evaluation of museum displays, focussing on prehistory in UK museums. McDowall uses visitor observation alongside questionnaires delivered both before and after visitors look at the displays. She presents her analysis of the data using word clouds, graphs, and infographics.

- British Museum Visitor Research and Evaluation website:  
<https://www.britishmuseum.org/research/projects/visitor-research-and-evaluation>

A large UK museum that dedicates a lot of resource to evaluating audiences, this webpage contains a summary of the British Museum's aims for evaluation. The 'Outputs' section includes some example exhibition evaluation reports (although the most recent is from 2019). These rely heavily on surveys, which are usually delivered by an evaluator, through a kiosk in the exhibition or online. Some are based on very small sample sizes (for example the report for *I Am Ashurbanipal: king of the world, king of Assyria* is based on 197 surveys, from over 139 000 visits). Note the use of graphs, images, and tables to present the information.

- Practical Evaluation Resources: <https://www.practicalevaluation.tips>

This website was the outcome of collaboration between university researchers Kate Noble and Eric Jensen, with an emphasis on evaluation with children and young people. The resources section includes helpful downloads, including templates for GDPR consent, questionnaires for teachers, young people and families and a suggested survey for the evaluation of longer-term projects. The logic model template is useful if you are at an early stage of your project as it can help you think through the evaluation process.

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- Sarah Jenkins, Dr Jenny Lisk and Aaron Broadley, *Natural Sciences Collections Association Subject Specialist Network Report: The Popularity of Museum Galleries*, Jenesys Associates Ltd, 2013.

A report for a Subject Specialist Network, persuasively using data collected in 10 museums with mixed subject matter, to measure the popularity of different types of galleries and the reasons visitors chose to visit them. Over 500 visitors were surveyed and over 250 interviewed, using questions that were tailored to each venue. Results are presented in simple graphs, tables, and utilising direct quotes in visitors' own words. Both the survey itself (particularly the demographic questions), and the presentation methods are showing their age, but it does a reasonable job at unpicking the data to match up the preferences of different demographic groups.

- Linda J Thomson and Helen J Chatterjee, *UCL Museum Wellbeing Measures Toolkit*, UCL, 2013.

A practical toolkit for evaluating wellbeing activities, tested in museums, but applicable more broadly. The resource was developed following an AHRC-funded series of workshops across the UK and includes two questionnaires (a long and a short version) and a set of 'Wellbeing Measures Umbrellas'. These are brightly coloured figures, with either a positive or negative word associated with a five-point scale. An analysis section takes the reader through creating some basic measures for reporting.

# Visitor Observation

Sarah-Jane Harknett

There are many ways of evaluating museums, galleries, displays and visitors. One useful method of working out what people are naturally doing in a gallery space is timing and tracking through observation. When we track visitors, we are trying to unobtrusively observe where they are stopping, how long they stop for and any other relevant behaviour (such as discussing, photographing etc). Visitor observation can give both qualitative and quantitative evidence.

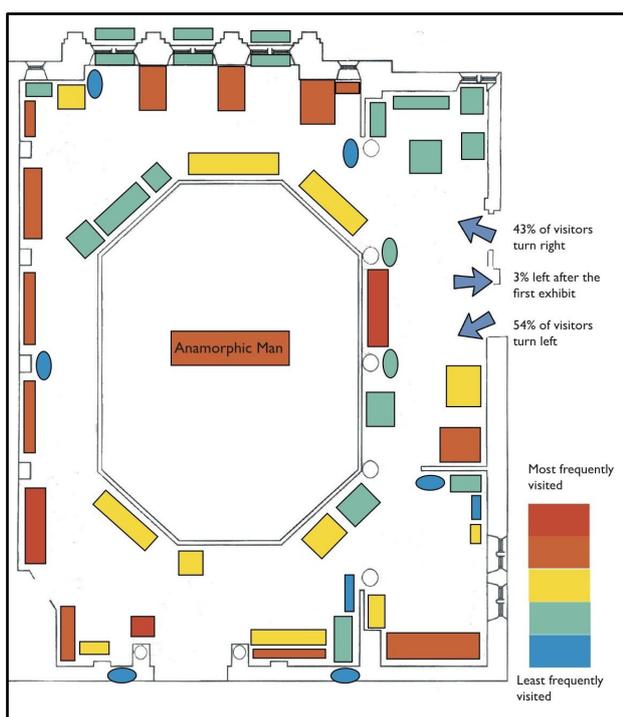


Figure 1: Sample Thermal Map

Museums can use this evaluation to change a current display, or when they plan future exhibitions. Observing museum visitors without the addition of other evaluation methods cannot distinguish between a long time spent at an element due to engaged interest, or because of deep confusion. For this reason, it is most useful to use tracking alongside other forms of evaluation such as questionnaires, interviews or focus groups. Using multiple evaluation methods is called triangulating your data. These can help the museum to further explore the results of visitor observation.

If we combine the results from many visitor trackings, we can create 'thermal maps' like the one shown in Figure 1. This shows which parts of the gallery visitors stopped at, which objects, cases or text were popular and which parts were ignored. We can also use the data to see what route visitors took through a gallery and the average time spent. Other thermal maps could be made showing which cases encouraged people to stop for a longer period of time. The results give an idea of how an exhibition space is being used.

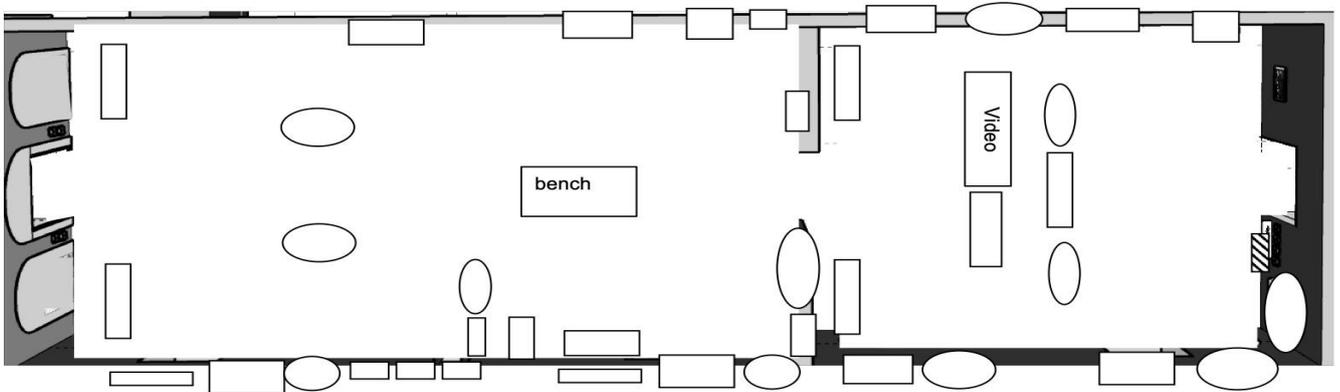


Figure 2: Visitor observation training

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## How to do it

Tracking forms and gallery plans should be tailored for each space to be tracked. Those doing the tracking should be familiar with these notes and should be quick and accurate at recording information.



Key: ○ Text    ▨ Large print labels

T: Tracker location when tracking commenced; X: stop, time noted in seconds; (X) : non case stop; C: calls others over; CA: called away by others

Date:                      Tracker initials:                      Time started:                      Time out:                      Total time:

Under 16    16 – 24    25 – 34    35 – 44    45 - 54    55 - 64    65 - 74    75+

Social grouping:    Individual    Pair    Group (3+)    School group

Notes:

Figure 3 Example tracking form

The person doing the tracking will fill in one plan per person tracked, following only one person at a time. The start and end point(s) should be decided and used to time the total visit. This could be the entrance to the gallery, or the area immediately next to a case or interactive.

The tracker will need to choose where to stand when they start the evaluation. They should mark this point on the tracking form, for example with a T. The observer may need to rotate around several different starting points to avoid unduly influencing visitors. Depending on the gallery, the tracker might need to move around to find out where visitors are stopping, or they might be able to stay in one area to take several observations.

The total time spent in the observation space should be noted on the tracking form. This could be from writing down the times the visitor starts and ends their visit, or by timing the length of the visit alongside timing each stop. It should not be calculated by adding up the stops.

Usually, we are interested in all the different elements of the area under observation. An element could be a case, a text panel, a single object in or out of case, an interactive exhibit, a computer, a book, etc. Mark down every time a visitor engages with an element. A 'stop' can be defined in lots of ways. In UCM we have defined a stop as the visitor both stopping and looking at an element. If the person you are tracking walks past a case, glancing at it without pausing, it is not recorded as a stop.

For every stop, mark the sheet with an X and add the amount of time the visitor stops for. Use a timer to accurately time each stop and write the time in seconds on the form. You might use a stopwatch, the timer on a phone or other device.



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## How to analyse the data

Figure 5 Sample spreadsheet with tracking data

You will need to analyse the data. The simplest way is to create a spreadsheet and enter the data into it. In Figure 5, the display elements have been numbered and are the column headers. Each tracking sheet is also numbered and entered in a row. The time spent at each element is added to the relevant column. Plenty of time should be given to entering and interpreting the data.

Various calculations can be performed using the data. For example, average time spent in the gallery by person or by element. Multiple trackings can be used to create thermal plans (such as Figure 1). Different plans could be created for average number of stops or average time spent per element, or focussing on particular element types (interactives, 2D artworks, artefacts, etc). The total time spent in the gallery, and the total time spent looking at text may be useful calculations for creating more engaging exhibitions if the same space is to be used.

### Ethics, safety, and security

We are interested in what visitors would naturally do in the observation space, so we do not ask permission before the visit begins. It would be unethical not to give people notice of the evaluation and the option to withdraw from the study. Each gallery being studied should have a sign prominently posted. The sign should read something like:

“We are currently evaluating our displays in this gallery. The information we are gathering will be used to improve future exhibitions.”

The sign should be put up in the tracking area before the evaluation session begins.

All relevant museum staff should be fully briefed on the evaluation project before it begins. If gallery attendants are present, they should be informed each time that tracking is taking place. Evaluators should introduce themselves to visitor services staff before they start tracking and should remain within sight of another member of staff or museum volunteer at all times. The venue may request that the evaluator wear a badge, lanyard, or other identification. Your organisation or the venue may require you to submit an ethics application.

Anyone evaluating visitors should be ready to explain what they are doing if they are approached, either by the person they are tracking, or any other visitor. If someone would like to withdraw from the study, the tracking sheet should be removed and disposed of. A note should be made that there has been a withdrawal.

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With most tracking studies, the evaluator has no contact with the visitor, but if the evaluation is to be carried out with children, young people or vulnerable adults, the venue's ethics procedure should be carefully followed. The evaluator should stop tracking immediately in case of emergency and evacuate according to venue directions.

People who are tracking visitors should always remain in public areas. They should not follow visitors into toilets or private gallery areas and should be vigilant on uneven floors. Trackers should take extra care when evaluating gallery space that includes stairs, they should not stop or be distracted while they use staircases. Hazards like these should be marked on the tracking sheet.

## Cautions and caveats

Observation is helpful to show visitor flow and circulation, but it has limitations. You can see what visitors are doing but the data doesn't always tell you why they are doing it. Is a visitor reading a text panel for five minutes because they find it engaging, or because they do not understand it? This evaluation technique works best when it is one of several that you are using so that you triangulate your data. It also works well when you use the results to give direction to other evaluation methods you use. For example, if your observation shows a particular area is being looked at in depth, interviews, meaning maps or surveys might help you determine why and what visitors are learning.

When you present the observation results, make sure it is obvious in your report when there are calculations that are based on very few visitors. It is very easy to draw conclusions about people spending a long average time looking at an exhibition element, but it might only be based on a handful of visitors. Take lots of photographs of the area that is being observed, from as many angles as possible. Include photos of individual elements as well as wider gallery shots. It can become very difficult to analyse results after an exhibition closes if you do not have good images from a visitor perspective.

## Further reading and other resources

- Beverly Serrell. 'Paying Attention: The Duration and Allocation of Visitors' Time in Museum Exhibitions' *Curator: The Museum Journal*, 40.2, 1997, pp. 108-25 and 'Paying More Attention to Paying Attention', *Center for Advancement of Informal Science Education*, 2010.

Serrell's 1997 paper was a seminal work in the field of visitor evaluation through tracking, which she updated in 2010. The 1997 paper gives an outline of her motivations, and the summaries of evaluation in over 100 North American exhibitions in order to find common visitor behaviour. Serrell's attempts to create generalisations about museum visiting (the Diligent Visitor and Sweep Rate indices) are less successful, but both articles are a good introduction to the method and potential ways of presenting results.

- Steven S. Yalowitz and Kerry Bronnenkant. 'Timing and Tracking: Unlocking Visitor Behavior', *Visitor Studies*, 12.1, 2009, pp. 47-64.

A very practical introduction to timing and tracking. The section on technology is very much of its time, but the paper goes into more depth on how to record and report tracking data. The worked example is of an exhibition about sharks which was on display in an aquarium in 2006.

- Paco Underhill. *Why We Buy: The Science of Shopping*, Simon & Schuster, New York. 2008. While not directly about evaluating museum visitors, this accessible read about shopping theory will introduce some of the main themes that have been more generally applied to observing users.

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A couple of papers using technological methods to observe or record visitor behaviour:

- Dirk vom Lehn, 'Embodying Experience: A video-based examination of visitors' conduct and interaction in museums', *European Journal of Marketing*, Vol 40 No 11/12, 2006, pp. 1340-1359.

Vom Lehn uses video recording in two London museums, an art gallery, and a science centre. Note additional ethical considerations if video recording takes place.

- Claudio Martella, Armando Miraglia, Jeana Frost, Marco Cattani, Maarten van Steen. 'Visualizing, Clustering, and Predicting the Behavior of Museum Visitors', *Special Issue IEEE International Conference on Pervasive Computing and Communications (PerCom)*, 38, 2016, pp. 430-43.

The results of a study involving 180 visitors to an art gallery while wearing proximity sensors.

# Accompanied Visits

Sarah-Jane Harknett

For accompanied visits, an evaluator joins the participants for their experience in the museum, programme, or event. Unlike visitor observation, with accompanied visits the participants know that they are part of an evaluation. This method is especially useful when a specific audience is targeted, using a small sample of that audience. It gives immediate, in-depth feedback on a fairly natural visit experience.

### How to run accompanied visits

Planning for accompanied visits can be time consuming, but the more thoughtfully carried out this process is, the better the results. Careful consideration should be given to the intended audience of the intervention that will be evaluated. This will help you to know who should be targeted for the accompanied visits. Recruit carefully using your preferred method. You might, for example, use snowball sampling: where members of your target audience suggest other people for an accompanied visit. Think about where the audience is and go to them to recruit. Have all necessary paperwork, including internal ethical frameworks, information sheets and any permission forms (for photographs of people or artworks) ready in advance. See the checklist at the end of this resource.

Carefully schedule the time that the accompanied visit will happen. This will depend on the availability of the participants and evaluator, the time of the event, public transport, etc. Try to be as flexible as possible. Will you cover the costs of transport and refreshments? For some audiences, this will be essential to encourage them to take part. Each accompanied visit could take several hours. Factor in time at the end of an event for an interview to discuss the visit.

The person doing the evaluation should not be someone who contributed to the event or programme that is being evaluated. Their role is primarily to observe and document. Spend some time deciding how the data will be collected during the visit. You could use voice recorders and the evaluator could take field notes during and after the experience. Test out any technology before you use it and make sure it is compatible with the group and the environment you are evaluating.

Successful accompanied visits will depend on good communication between the evaluator and the participants. Everyone should know where and when they will meet and introduce participants and evaluator if they don't know each other. You might want to provide name badges for evaluators. The participants should be clear on the format for the accompanied visit and how long it might take.



*Figure 1: Accompanied visit at Cambridge University Botanic Garden*

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Before the visit, determine how the evaluator will treat the people being evaluated. Will they be a silent partner on the visit, observing the interactions and making notes? Will they ask questions throughout the experience to clarify what is happening? If they are asked questions from the person or people they are accompanying, how will they respond? They might be asked about the contents of a display, questions of orientation or where the loos are. How will the evaluator deal with these scenarios? Will they say that they don't know, and try to determine from the participants how they will find out? Or will they be an active participant? Is it important to your study that they maintain neutrality? The people being evaluated should receive no special treatment in the venue because of the presence of the evaluator, even if the evaluator is known to the venue. You might decide that it would be helpful to do a pre-visit interview with the participants, either immediately before the accompanied visit or at an earlier time. This could help you to frame the questions and observations you will make during the accompanied visit.

If you are going to time the visit, determine what you are timing. Will you just time the entrance and exit? Time at specific displays? What will you do when someone goes to the loo or the café? You might want to create a sample timing sheet so that key times can be filled in quickly. How will you record the times? Test out any technology well before the evaluation starts.

The evaluator might have specific questions to ask at various points during the experience. It can help to write a script for these, with questions and further prompts. The evaluator should record what prompts they use and when. What other notes will the evaluator take? Will they be writing down what visitors are saying and doing? Are the participants getting bored/cold/wet? Are they frustrated? What are different members of the group doing? If you are evaluating a group, decide what you will do if the group splits up. Who will you follow? Ensure the evaluator notes where the members of the group go.

Notes should be made carefully but subtly. Evaluators need to be thorough and consistent in their recording. Provide as much guidance and standardisation in advance as you can. If the people being evaluated are discussing things which are not relevant, the evaluator might want to take a note of this as well, for example "discussed tomorrow's dinner for 10 minutes". You will probably want to use a shorthand for referring to the group members during the visit. Sort this out at the beginning and write down who is who so that the notes can be transcribed properly.

Plan carefully how the evaluation will end, and what that end point is. Will you complete the evaluation when the people you are accompanying have finished looking around the venue? Will the evaluator just leave, or will there be another way to conclude the visit? You might want to have a summary interview. If so, this could be facilitated by the same accompanying evaluator, or could involve someone else. Write the interview schedule and find a suitable location. The interview could take place immediately after the event, or it could be some time afterwards: decide which you will do and try to keep this consistent for each participant you interview.

After the accompanied visit, the evaluator should write down their final notes and impressions. They should read through their notes to check that they have captured everything and clean up anything that looks confusing. All notes and recordings should be transcribed as soon as possible.

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## What to do with the data

Data collected from accompanied visits need lots of time allocated for analysis. You can look through your notes for themes and categories that crop up frequently. Look at what causes moments of frustration or joy. Were there regular times that visitors were confused or not sure what to do? If you are still in contact with the audience that you were working with, you could discuss the results with them and see whether your conclusions are accurate. Compare the results that you get to other methods of evaluation.

## Ethics, safety, and security

This method requires careful planning so that everything is handled ethically and safely. Participants should be given information about the evaluation when they are recruited. Your organisation or the venue you are working with might require you to submit an ethics application, so check well in advance. Familiarise yourself, and strictly adhere to, any relevant institutional lone working policies and guidance on Disclosure and Barring Service checks. Participants should be made aware of how and when they can withdraw from the evaluation.

Accompanying evaluators should be well-briefed and given contact phone numbers of the coordinating staff and the venue. Depending on where and how the study takes place, you may want to schedule regular check-ins with staff who are taking part in an accompanied visit. The evaluator should have all relevant paperwork, technology, notebooks, pens, and briefing notes. They need to feel confident, and to be clear on how to handle situations and questions. They should also know what to do and who to contact in case of emergency or any problems.

You will need to carefully consider whether the venue needs to know the accompanied visit is taking place or not. There could be good reasons for not telling them. The evaluator or group may already be known to the venue, but if you would like to make sure the group is neither advantaged nor disadvantaged by this relationship, relevant staff in the venue should be briefed in advance.

## Cautions and caveats

While accompanied visits try to be as natural as possible, the presence of an evaluator will change the way the audience behaves. This should be acknowledged in reports and the steps that have been taken to keep the experience neutral should be clarified. This evaluation method is time consuming, so will usually only be done with a small number of people. This could be a very small sample size, so take care when drawing conclusions.

Evaluators should always ensure their personal safety, in accordance with your organisation or the venue's policies and procedures. They should remain in public spaces, within sight of other people. They should not accompany participants into toilets, private vehicles, or other areas. The evaluation needs to be carefully risk assessed for the specific activity that will be carried out.

## Further reading and other resources

- Emily Dawson “‘Not Designed for Us’: How Science Museums and Science Centers Socially Exclude Low-Income, Minority Ethnic Groups”, *Science Education*, 98.6, 2014, pp. 981-1008.

An enlightening paper which uses focus groups, interviews and accompanied visits to look at how specific audiences use (or don't use) science centres. Dawson uses quotes from group members throughout to support her conclusions.

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- Eilean Hooper-Greenhill, Theano Moussouri, Emma Hawthorne, Rowena Riley, *Visitors' Interpretive Strategies at Wolverhampton Art Gallery*, 2006.

This in-depth evaluation at Wolverhampton Art Gallery consisted of 18 accompanied visits with adults who were visiting on their own. The report covers the steps the team took to collect the data, as well as the displays that were on view at the time. The team collected a great deal of demographic information, not all of which may be necessary for your evaluation. The longest section of the report (chapter 6) attempts to use the reflections on the accompanied visits to determine the strategies used by visitors when they interpret art.

- Abigail Hackett, 'Zigging and Zooming All over the Place: Young Children's Meaning Making and Movement in the Museum', *Journal of Early Childhood Literacy*, 14.1, 2014, pp. 5-27.

The results of research with young children in an English museum with mixed collections, there is a strong theoretical framework in this paper. The section outlining the study clearly explains the participants and methods of data collection. Quotes from the author's field notes are included to illustrate her findings.

- Janne Flora and Astrid Oberborbeck Andersen, 'Taking note: a kaleidoscopic view on two, or three, modes of fieldnoting', *Qualitative Research*, Vol. 19:5, 2019, pp. 540-559.

While this article is not directly about accompanied visits, it usefully explores field notes taken by two different researchers, presented alongside GPS data. Reading this paper may help you to decide about what notes to take and how, as well as showing how different people might record the same experience.

# Impact Evaluation Resources

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## **Accompanied Visits Checklist**

### **Ethics and paperwork**

- Do you need to submit an ethics application to your organisation or the host venue?
- Have you written guidance for participants?
- Do you have permission forms for participants if you are photographing people or their artwork?
- Who will do the accompanied visit?
- Have you written guidance for evaluators?
- What will the role of the evaluator be? How will they deal with questions and activities?
- Do your evaluators need Disclosure and Barring Service checks?
- Do you have a risk assessment in place?

### **Audience Recruitment**

- Who is the intended audience?
- Who in your intended audience will you recruit?
- How will you recruit?
- Will you be paying travel expenses?
- Will you be providing refreshments?
- Will you be recompensing participants?
- Will you do a pre-visit interview? If so, where, and when?

### **The Visit**

- Can your participants get to and access the venue?
- Can your evaluator get to and access the venue?
- Does the participant know when and where they will meet the evaluator?
- Does the evaluator know who the participants are and how to connect to and contact them?
- Does the evaluator have contact details for the venue and co-ordinating staff?
- Does the evaluator know what to do in case of emergency or evacuation?
- Will the evaluator need a name badge?
  
- How will the evaluator collect data during the visit?
- Do you have a shorthand planned to refer to different group members?
- Does all the technology work in every part of the venue? Do you need to connect to venue wifi and are all the passwords available?
- Is the evaluator clear on their role?
- Does the evaluator need a script for questions and prompts?
- Do you need to schedule check ins with the evaluator and another member of staff?

### **The End of the Visit**

- Will someone be conducting a post-visit interview? If so, who will it be? Where will they do it?
- When will they do it?
- Will there be time and space for the evaluator to write down their thoughts and impressions immediately after the visit?
- How will the evaluator get the notes to the co-ordinating staff?
- Will you be returning to the participants to talk about your findings?

# Reflective Evaluation (with staff)

Sarah-Jane Harknett

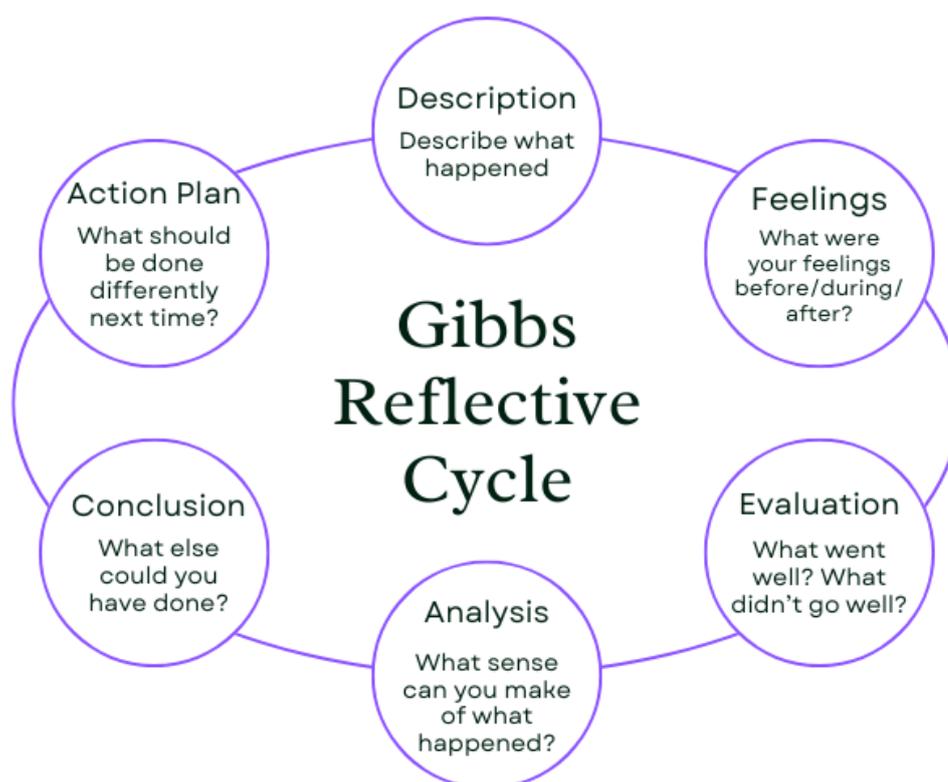
Museum evaluation often focuses on visitors or participants. The method covered in this resource is designed to get rich feedback from the people leading a programme, curating an exhibition, or delivering an event, who are an audience that are often missing in evaluation. Reflecting on museum work can empower staff, helping them to improve their practise, and give them the opportunity to feedback on projects and programmes. Reflection is a moment to think about what has taken place. This can become reflective practise when it is carried out in a more systematic fashion, taking note of responses, and learning from them. Reflecting on experiences in a guided way can be an effective method of evaluation, it can help make sense of what has happened, improve future effectiveness, and give a deeper understanding of processes (not just outcomes). This can be a useful method for projects that take place over a long period of time, you can trace the course of the work you are evaluating, from instigation to completion and beyond. It can also be responsive to changes in work, giving you moment by moment data which could be lost, especially if only summative methods are used.

### How to do it

- Decide on the overarching framework that you will work within

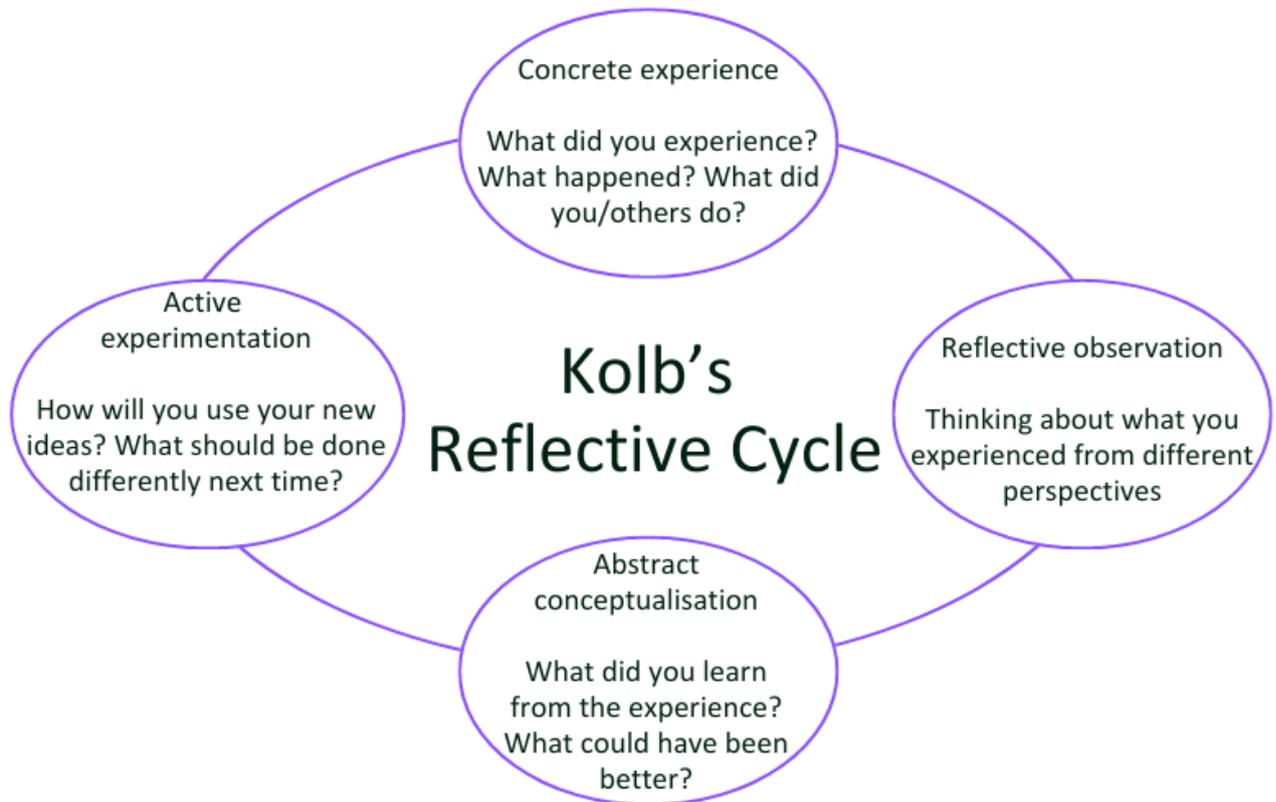
There are a few different frameworks that might help you to create the best processes for your evaluation (see references in the Further Reading section below).

The Gibbs reflective cycle breaks reflection down into six steps:



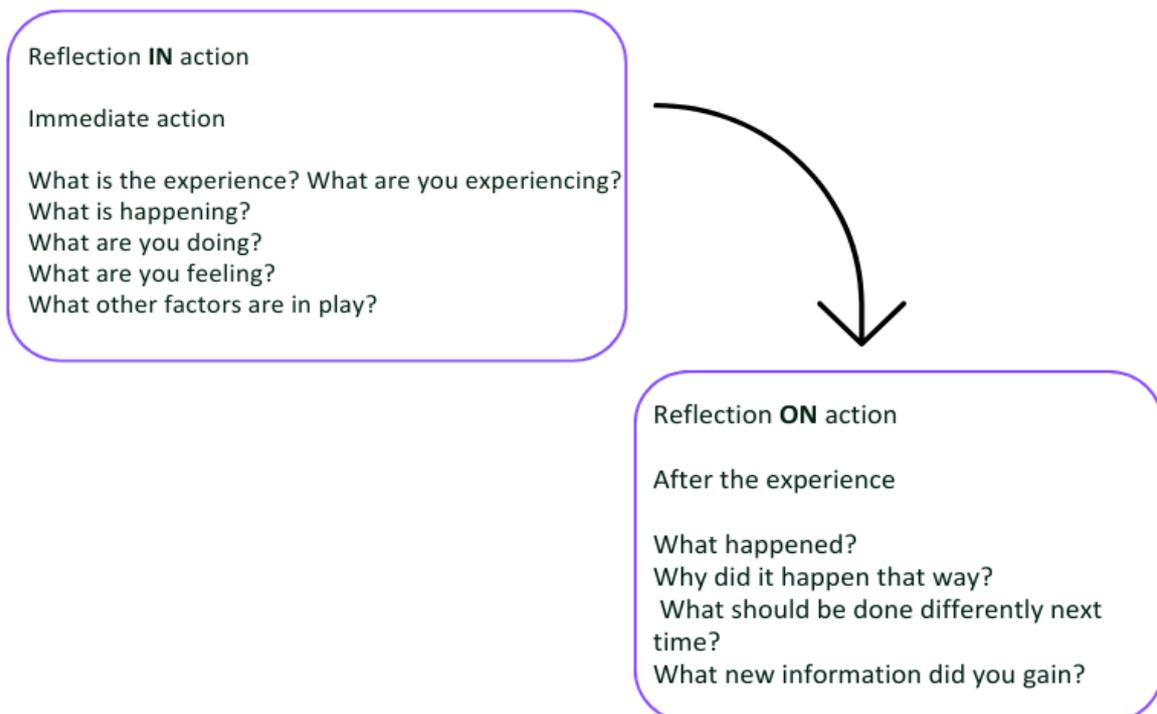
# Impact Evaluation Resources

The Kolb reflective cycle is four steps:



And Schön is just two:

## Schön's Reflective Model



# Impact Evaluation Resources

- Decide on the questions you will ask and how you will ask them

Once you have thought about the framework you will work within, decide on the questions you will ask as part of the evaluation. There is a list of possible questions later in this resource. Don't try to have too many questions at each stage; you could choose to ask a couple of specific questions and a couple of bigger picture questions. Select the questions that are appropriate to the framework, your project, and the people doing the reflecting. How will people respond? Will you give each person a physical notebook, access to an online document, or via a webform or online survey? There is a sample feedback sheet based on the Gibbs Reflective Cycle at the end of this resource that you might want to adapt. Will people answer the questions on their own, or will you do this as a group discussion activity, or a mixture of the two? Decide how often you will reflect on the project you are evaluating. There is a delicate balance here: you want to ask regularly, but not so often people get tired of responding and the quality of their reflection and answers drops. Are there specific moments that would work? For example, key phases of the exhibition or programme. How will you end well? You will probably want to do a reflection immediately the project finishes, but another session a little while afterwards can be beneficial, when the dust has settled, and people have a bit of distance from the emotions (and exhaustion!). Although we are recommending this to evaluate with staff, you might decide to also use some of the same reflective questions with an external group or audience.

- Collect the data.

The time spent in planning should mean your data collection period runs smoothly.

## How to analyse the data

As with many qualitative evaluation techniques with free text responses, reflective journaling can result in a lot of long form text, but having clear project or programme aims gives you something to compare your results to. The data can be difficult to analyse, so allow plenty of time to do this. You will need to familiarise yourself with what people have written, and then you could look for repeating patterns or themes. If people are answering the same questions throughout the project, or there is more than one person reflecting, look for subtle changes or any differences as the project continues. It can be easy to use reflective journaling to support conclusions that are not present in the results. You can avoid this by using several evaluation techniques with the different audiences that are involved.

## Ethics, safety, and security

It is very important that the people who are reflecting know what will happen to what they write and who will have access to it. Reflective feedback could be kept for the sole use of the person who is responding, or it could be part of more formal evaluation processes. Provide clear written information to participants on how you will look after their data. Be aware of how this might affect what people write and how open they are. If you are promising anonymity, ensure that you can uphold this. It is more than likely that you will need to do more than simply removing participant names: the museum world is quite small, job titles can be very specific, and it can be fairly easy to identify people with a quick internet search.

Think carefully about how you will support participants in reflective practice. The process might bring up strong emotions or difficult feelings in relation to the experience that is being evaluated. How can you help staff that are left with negative feelings, especially when they are thinking about projects that have been hard emotionally or when things did not go as well as they hoped? This is important to plan for when people are completing reflective journals on their own, but it can also

# Impact Evaluation Resources

affect an individual who is responsible for analysing all the data and might also feel emotionally impacted by what has been written. Find information of relevant support networks or provide participants with the contact details of people or other organisations that might be able to help.

## Cautions and caveats

Reflective practise does rely heavily on the motivation of the participants, so might not be suitable for everyone or for every project. It also depends on the participants remembering to do the evaluation, although you might be able to automate the process to some degree with online data collection and delayed email prompts. As there are no standard questions, it is possible that important information could be lost. Even if you use the same questions for all participants throughout the project, there will probably still be quite a lot of variation in the quality and depth of reflection. Think about how you will recognise this in your reporting. As with most evaluation, reflective journaling works best when it is part of a variety of methods you are using rather than the only one.

## Further reading and other resources

References for frameworks:

- Graham Gibbs, *Learning by Doing: A guide to teaching and learning methods*. Further Education Unit, Oxford Polytechnic. 1988.
- David Kolb, *Experiential learning: Experience as the source of learning and development*. FT Press. 1984.
- Donald A. Schön, *The Reflective Turn: Case Studies in and on Educational Practice*. Teachers College Press, 1991.

Museum-related resources:

- Claire Bowen, How to develop a reflective practice, *Thinking Museum* <https://thinkingmuseum.com/2021/11/17/how-to-develop-a-reflective-practice/>

This article, also available as a podcast (episode 29 on The Art Engager podcast) is a useful background introduction to reflective practice, providing some practical suggestions about how to do it. Many of the podcast episodes cover ways for learning and visitor services staff to continue to reflect on their work and its implications.

- Barbara J. Soren, 'Museum experiences that change visitors', *Museum Management and Curatorship*, 24:3, 2009, pp. 233-251.

A thoughtful article examining whether a museum visit can meaningfully impact visitors, through two case studies. The first, at the Royal Ontario Museum in Canada, explicitly uses reflective journals with audiences, but Soren's own reflective practise is present throughout, for example in the table of 'triggers for transformational experiences' created through her teaching.

- Marjoleine van der Meij, Jacqueline Broerse and Frank Kupper, 'RRI & science museums; prototyping an exhibit for reflection on emerging and potentially controversial research and innovation', *Journal of Science Communication*, 16:4, 2017, pp. 1-24.

The authors of this paper were trying to create a display in that would help visitors to reflect on responsible research and innovation in science (the RRI in the title). They worked with NEMO Science Museum in the Netherlands, testing different exhibitions and interviewing children and their parents to see what they understood by what they saw. There is a helpful analysis section, and the notes on the facilitation of the sessions could also be of use to other museum professionals.

# Impact Evaluation Resources

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- Neta Shaby, Ran Peleg, Ian Coombs, 'Participatory Research with Museum Practitioners: A reflection on the process', *Research in Science Education* 54, 2024, pp 891-908.

A paper combining reflective practise and participatory research methods, the authors analyse the process of working with staff at Winchester Science Centre to create an evaluation toolkit. The details about how they apply a framework are helpful as is the section about how reflection worked as part of the research. There are many quotes from (named) members of staff, which is complemented by a final paragraph on ethical considerations.

- Bernadette T. Lynch, 'Custom-made reflective practice: can museums realise their capabilities in helping others realise theirs?' *Museum Management and Curatorship*, 26:5, 2011, pp. 441-458.

Bernadette Lynch has spent many years encouraging reflective practice in museums. This paper is the conclusions of her work examining the impact of 12 community engagement projects in museums and galleries funded by the Paul Hamlyn Foundation. She argues powerfully for the inclusion of review and reflection on what museums do and who they do it for. Bernadette includes a variety of sources to support her deductions: the analysis of policy documents sits alongside quotes and images from participatory drama that staff were involved with.

Non-museum resource:

- The University of Edinburgh Reflection Toolkit: <https://www.ed.ac.uk/reflection>

A helpful website containing toolkits for those wanting to know more about reflection, and for those who will facilitate reflective workshops. Excellent further reading list if you want to dig further into the literature.

# Impact Evaluation Resources

## Sample prompt questions

This is not an exhaustive list of questions. Neither is it a list to exhaust yourself with by going through them all. Select a few questions to answer at each stage.

### *At any point in the evaluated work:*

Who... [Was involved? Wasn't there that should have been? Spoke most? Who might you need to draw in?]

What... [did you do? Happened? Will you change for the next step?]

When... [will you meet next? Will you contact the participants?]

Where... [will you take the project next? Will you meet next?]

How... [are you feeling about the project? Will you change what you're doing?]

### *Before the work starts:*

Why are you doing this?

What are you most looking forward to?

What worries you about it?

What skills do you think you will learn?

What do you personally bring to this?

What will your role be?

Who do you think will come/be involved/be interested in the outcome? Who might be excluded?

### *During the project:*

What happened today?

How are you feeling about the work?

Were there any memorable moments for you?

Did something happen, or did someone say something, that surprised or inspired you?

Were there any 'ah-ha!' moments for you or that you observed in any of the participants?

Who came today?

Who didn't come? Do you want to change that? If so, how could you do that?

What was my contribution today? What did I do too much of? What did I do too little of?

### *Summative prompts:*

What did you enjoy most about being involved?

What did you find satisfying?

What did you find the least enjoyable?

What did you find frustrating or annoying?

What did you learn? What is your main takeaway?

If we were about to start the work again, what three things would you do to improve it? What advice would you give yourself?

What might you do differently as a result of the work? What might you stop doing? What might you start doing?

Who came? Who didn't come?

How do you feel about the work now?

What was the most valuable part of the work?

# Impact Evaluation Resources

## Gibbs Reflective Cycle Feedback Sheet

<b>Description</b> [Describe what happened]
<b>Feelings</b> What were your feelings before the activity?  What were you feeling during the activity?  How did you feel after it?
<b>Evaluation</b> What went well?  What did not go well?
<b>Analysis</b> What assumptions have you been making?  What sense can you make of what happened?
<b>Conclusions</b> What else could you have done?
<b>Action Plan</b> What should be done differently next time?  What would that need?

# Interviews

Sarah-Jane Harknett

Alongside surveys, interviews are one of the most common methods of evaluating museum experiences and exhibitions. Interviewing people gives you the opportunity to dig deeper into responses than you can with a questionnaire, to find out motivations and probe the interviewees answers. You can get rich feedback and will often get more emotional responses, stories, or memories. Interviews can be used at any evaluation stage of your exhibition, project, or programme. You might use interviews to find out what your target audience thinks about a topic before you start the research for an exhibition (front end evaluation), or you could use them with staff or participants through the life of a project, or as a summative evaluation method to determine audience ideas once a display is open. Interviewing people is a skill, you might need to develop your listening abilities to become a good interviewer. Interviews can be carried out with just one person, or you could choose to interview a group of people; they can happen in person, or online. As with most evaluation, interviews works best when they are part of a variety of methods you are using to find out about your activity. Interviews can be helpful when you have already got some evaluation information, but you want to find out more about people's opinions, feelings, or knowledge.

### How to do it

- Decide what you want to find out

Plan your evaluation carefully so that you have clear aims and objectives. This will help guide the rest of your preparation and make your data collection stronger and more focussed.

- Who will you interview? How many interviews do you need?

Will you be interviewing everyone who took part in an event or project? Or a sample? If you are taking a sample, do you want them to be representative of the whole group? Sometimes you will need to use 'snowball sampling', where you ask one person to recommend other people to be interviewed. There are lots of different sampling methods, chose the one that works best for your project and fits with your evaluation plan that you wrote in the previous step. Consider whether you should be paying your interviewees for their time, don't take them for granted. Your budget may also influence the number of people you can interview.

- Plan your interviews

You might want to write out a detailed list of the interview questions, or you could decide on more open themes to discuss. Sometimes you will want to have more of a conversational style, where the interviewee also leads discussions. At this point in your planning, work out what style of interview you are interested in doing. If you are writing an interview schedule, try not to ask leading questions, keep them neutral and easy to understand. Don't ask more questions than you need, have a reason to ask each one.

- Pilot your questions and recording method

If you have written interview questions, test them out to ensure they are clear and are giving you the information that you hope for. Piloting will help you to check that other people understand the questions in the way you intend. It will also give you an idea of how long the interview might take and whether you can trim some of the questions. You will probably want to record the answers that

# Impact Evaluation Resources

the interviewee is giving you. You could use your phone, although be mindful of the ethics of having information on personal devices. Digital audio recorders might be a better investment. Some websites offer both recording and transcription, usually with a limited free version. Use the time that you are piloting your questions as an opportunity to check any recording system you intend to use so that you are familiar with it and confident it gives you the results you need. Try to pilot your interviews in the same location that you will do them in, so that you know that audio can be picked up clearly by the system you are using.

- Recruit your interviewees

Follow the sampling strategy you decided on if you are using one. Be honest with people when you recruit them, tell them what they are getting involved in and why you are doing it. This is good practise, but also helps to build that relationship of trust. Let people know the practical information: where do they need to be and when? Send out information sheets so that participants know what will happen to their personal information and data.

- Prepare any physical prompts

You could use images, museum objects or documents as props or prompts in the interviews. For some audiences these will help you to open up the conversation. Prepare anything you are going to use and store them somewhere easy to access. If the interviews will take place off-site, don't try to take too much.



*Figure 1: interviews do not have to be intimidating to be useful*

- Prepare the location

Where will you carry out the interviews? You might not have a choice about this, but you could select a venue that is relevant to the topic you are interviewing people about, or somewhere where you will not be interrupted or distracted. You could interview people online, if you do this then send out links in plenty of time and be in the meeting room ready to welcome the interviewee. If possible, use the online platform that they prefer and feel comfortable using. See the 'Ethics, safety and security' section below for some important things to consider for interview locations.

- Carry out the interviews

Explain the format of the interview, how long it will take, whether what they say is anonymous and confidential, how to get in touch with you after the interview and what you will do with the information they provide. You should give this information in a format that works for the participant, which will probably be in writing. When you begin, you will need to establish rapport with your interviewee, but don't go over the top. Don't mislead the person or promise something that you are not going to follow up. Do let them know how they can contact you after the interview has finished. Ask your questions one at a time and wait for the interviewee to respond. Don't be afraid of leaving silence, especially if you are interviewing someone online. You might need to direct

# Impact Evaluation Resources

a conversation back to your topics, but remember that your interviewee is the expert, they might be heading to a really important point that you have not considered.

You might find it helpful to take your own notes during the interview, even if you are recording the audio. You could jot down topics you want to return to, areas that need clarification or things that you don't understand, and then return to these at a moment that doesn't interrupt the flow of the speaker. Check that your recording system (and the back-up) are working every now and then during the interview. Do keep nodding and don't let the notetaking make it look like you are not listening. You want your interviewee to feel comfortable and confident that you are interested in what they are saying.

- Create a transcript and back everything up

Once your interview is finished, you need to create a transcript. Some online recording websites will provide an AI-generated transcript, but you will need to check that this is accurate. If you are not using automatic transcription, allow plenty of time to write this from your recordings. Name the files carefully so that you can find things easily. If you write your interview up very soon after it has happened, you could add things that you observed or noted down that were not captured in the recording, for example any nonverbal behaviour that might be significant: when they leaned forward, stood up, facial expressions etc.

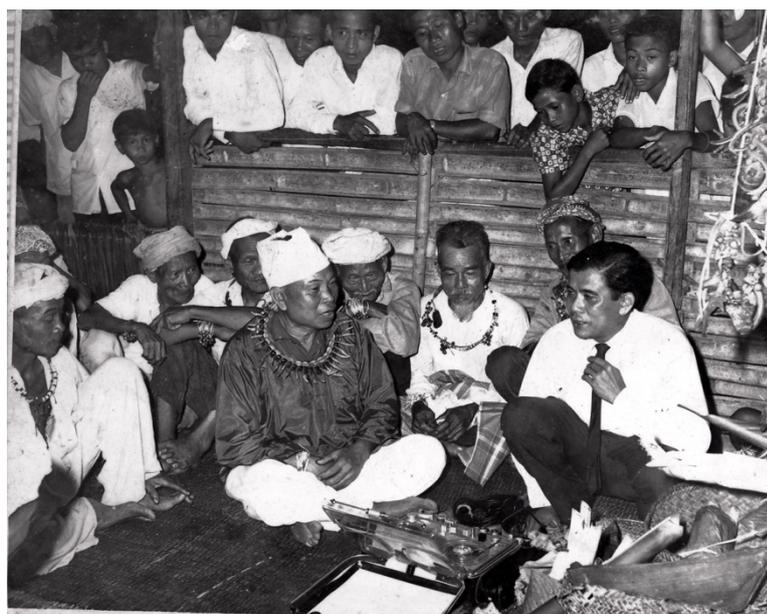


Figure 2: an interview taking place in Borneo in the 1960s or 1970s. MAA collections DG.102008.PAO

## How to analyse the data

As with many qualitative evaluation techniques with free text responses, interviews can result in a lot of long form text. Your evaluation should have clear aims, so that you know what data you are collecting and why; this will help you to analyse your data. The results can still be difficult to interpret, and you can have hours of work to transcribe and analyse, so leave plenty of time to do this. You will need to familiarise yourself with what people have said, and then you could look for repeating patterns or themes. If you are speaking to several people on the same topic, look for changes between people and see if you understand what is happening. Check the conclusions you

draw from interviews against the results from the other evaluation techniques you are using.

Resource in the 'Further reading' section below have more information on analysing your interview data.

## Ethics, safety, and security

Your organisation or venue may require you to submit an ethics application in advance. Even if they don't, spend some time thinking about all the ethical implications of your interviews. If you are interviewing children, young people, or vulnerable adults, you should think carefully about the ethics of this. For all interviews, only collect relevant personal data and have a clear strategy on what you will do with it. Prepare an information sheet for the interviewee that states what will

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happen to their personal data and the interview, how the interview is being recorded, how those recordings will be stored and for how long, and who will be able to access them. You could conduct interviews in the museum space, or they could be off-site. Another person should always know where the interviewer is, when they will return, and they should have a check in at the end of the interview. When you are interviewing, stay aware of your surroundings and always keep your personal safety in mind. You need to find the balance between conducting the interview somewhere that is private enough for the interviewee to feel comfortable and can speak freely but is also safe for everyone. If the participant will be able to see quotes or the transcript before you publish, tell them, but don't make promises that you will not be able to keep. If you have guaranteed anonymity, the quotes you publish should be truly anonymous, participants should not be identifiable with a quick internet search with the details you give.

## Cautions and caveats

Be aware that some of your questions might provoke strong emotions or difficult feelings in the interviewee. This can happen even if you don't think your questions are supposed to provoke emotional responses. Piloting your questions before your data collection interviews will certainly help, but you might still be surprised at the direction an interview can take. Plan how you will help your interviewee if they do get emotional. How will you support and keep safe both interviewees and the interviewer? Are there any support networks that you can direct people to?

## Further reading and other resources

This resource has only scratched the surface of interviews for evaluation. A couple of non-museum publications that you might find helpful are:

- Steinar Kvale *Doing interviews*, Sage Publications, 2007.

An academic look at qualitative research interviews, this publication covers the process from ethics, how to carry out the interview, transcription, analysing and reporting. Useful if you are thinking about publishing the results of your interviews.

- Annette Lareau, *Listening to People*, University of Chicago Press, 2021.

A very practical guide to interviewing and observing people, with chapters on writing your notes, analysing the data, and writing up. The text is broken up with suggestions, lists of dos and don'ts and quotes from Annette's work. An easy read that will help you to think through the process and make you a better interviewer.

Museum examples:

- Louise Archer, Emily Dawson, Amy Seakins and Billy Wong, 'Disorientating, fun or meaningful? Disadvantaged families' experiences of a science museum visit.' *Cultural Studies of Science Education*. Vol 11:4, 2016, pp. 917-939.

A paper which combines interviews and visitor observation with 10 parents and 10 children from an inner-city school in London who visited the Science Museum. They spoke to the group both before and after their visit and observed them on their visit. There is quite a lot of theory in this paper, but the voices of the participants create a strong argument.

- Jennifer Bergevin, 'Narrative of Transformation: Stories of impact from activist museums', in *Museum Activism*, edited by Robert R. Janes and Richard Sandell, Routledge, 2019, pp 348-358.

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In this book chapter, the author discusses a longitudinal study where they interviewed museum visitors in the International Slavery Museum in Liverpool and the Center for Civil and Human Rights in the United States. The interviews happened immediately after their visit, with a follow up six months later. The author was interested in whether their time in the museum had inspired or changed the visitors, and whether that was something that affected their actions later. There are lots of long quotes from individuals to support the arguments.

- Sue M. Davies, 'The co-production of temporary museum exhibitions', *Museum Management and Curatorship*, 25:3, 2010, pp. 305-321.

Here the interviews are carried out with museum staff rather than visitors. Sue was interested in the development of temporary exhibitions, so alongside visiting them, she interviewed the people that produced them in 20 museums. This paper is a contrast to the others here, as it does not use supportive participant quotes, but the argument has been created from the interview data.

# Drawings and Creative Outputs

Sarah-Jane Harknett

For some audiences, responding in a creative way can be a meaningful way to evaluate an exhibition, experience, or event. Participants might draw, take photographs, create collages, or use other artforms to respond to stimuli from the exhibition or display they have visited or after engaging with a particular piece of research. Participants will often use their own experiences or perspectives as part of their creativity. Using drawing and visual imagery can be useful for groups which might struggle to respond in other ways, especially with written or word-based evaluation methods, but creative techniques can also be used alongside more traditional evaluation methods.

Visual methods can be used as a standalone evaluation, or to measure change, such as before and after a museum visit, intervention, or experience. The evaluation through drawing or visual imagery might be part of the activity, embedding it in the event itself. For example, you might want to get children's perspectives on an exhibition, so you ask them to respond creatively to what they see (see Figure 1 for an example). Alternatively, gaining a particular artistic skill might be an outcome in itself. You could even use it in a summative way by replacing your feedback form with a comic strip at the end of an event.

*The first child was around 6 years old. I had stuck some of the pictures on the tent. I took her over to look at them and asked if she thought the pictures seemed happy or sad. She thought they looked sad because they were 'fuzzy' and not colourful. I asked her if she would like to make a picture that had the same feeling. She chose a picture of a child about to get a vaccination, who looked scared and sad. She enjoyed adding things to the picture to change it, the tracing paper made it look 'fuzzy' like the photos.*



Figure 1: Evaluator's field notes and collage made by a workshop participant responding to an exhibition of photographs

### How to do it

Write clear instructions for what you would like participants to do, and carefully brief all evaluators so they are confident on their role, and how much assistance they are to give. You might want to give participants a very specific remit, with titles, hints, and a topic, or you might prefer to give broader opportunities for reflection. Ensure the task is directly related to your evaluation aims. Your prompt should not be leading or introducing bias; if possible, pilot your prompts in advance, ideally with your intended audience. If you are repeating the same exercise before and after an intervention there should be no other influences on learning (for example, if you are measuring before and after a museum visit, there should be no taught sessions in school on the same topic). If the drawing takes place in an environment without evaluators, in a school classroom prior to a visit

## Impact Evaluation Resources

for example, the instructions should be followed directly so that teachers do not add comments or guide the students.

If you are asking participants to draw something, you might want to add a space for them to label it or add a sentence or two about what they have drawn. The evaluator could ask questions about the drawing as well, or the drawing might be used as the catalyst for an interview. Asking clarifying questions can be useful so that you fully understand what has been drawn; note down what you ask and the participant's responses. Encourage participants to contribute *something*, even if they tell you they are not artistic or cannot draw. Children and young people may prefer either drawing or writing, they rarely want to do much of both. You may want to ask the facilitator or another evaluator to take field notes during and after the process to capture as much information as you can.

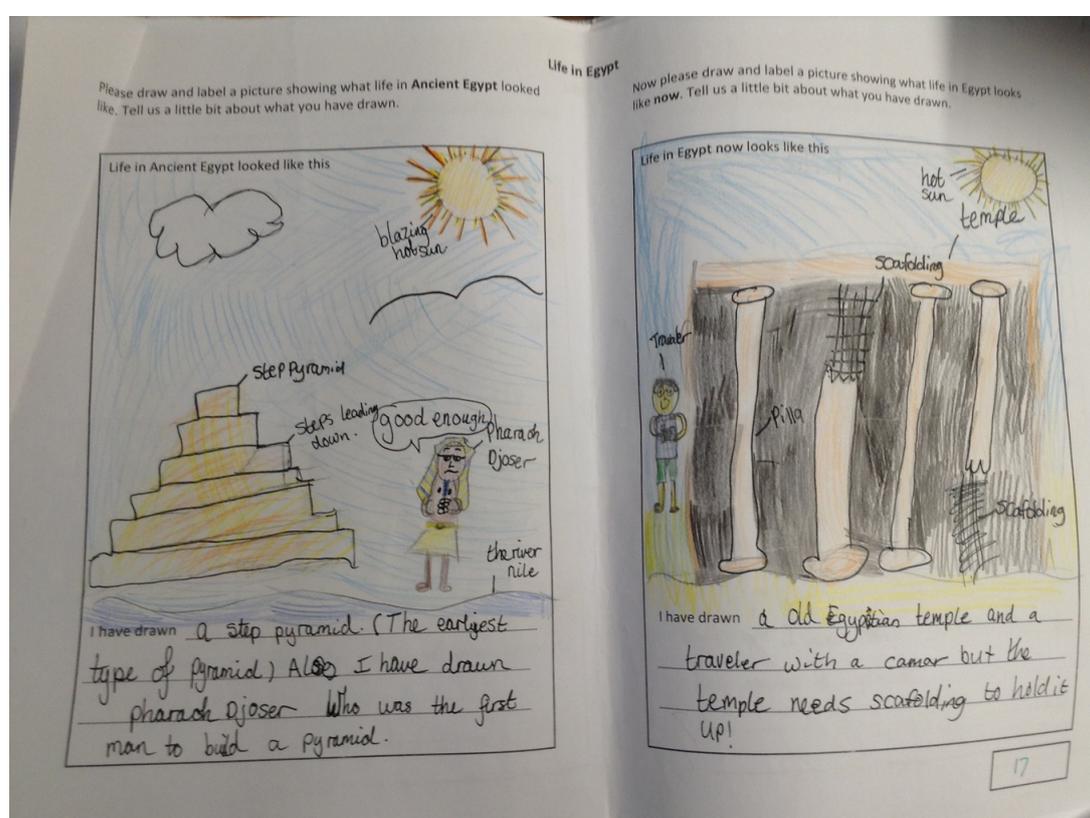


Figure 2: Children's drawings before they visited a museum to look at Egyptian displays. The prompts were 'Life in Ancient Egypt looked like this' and 'Life in Egypt now looks like this'.

If the evaluation is embedded in the task, the activity still needs to be engaging for the audience. It is easy to focus so much on the information or results that you want to get out of it that you lose sight of making it interesting for the participants. Get all the paperwork ready in advance of your event, make sure it is simple and quick to complete and that it is clear to the audience that you are gathering evaluation data. Gather all the materials that you need. Creative evaluation can be resource heavy, sometimes with lots of paper printouts, materials, or equipment. Consider the environmental impact and amend things accordingly if possible. If participants will take their work away with them, work out how you will capture their creation, either through taking photos or some other way.

# Impact Evaluation Resources

## **Ethics, safety, and security**

All relevant staff should be fully briefed on the evaluation project before it begins. As this is a method which is often used with children, young people or vulnerable adults, the venue's ethics procedure should be carefully followed. Consent forms and information sheets should include consent for retaining or taking photos of creative work, as well as pictures of people (if relevant). Formal consent should be provided by parents or guardians if young people are the evaluation participants, but children should also be asked if they are happy to take part. No personal information should be visible in the photographs, check artworks carefully before taking a picture.

## **What to do with the data**

You will need to leave a lot of time for analysis. Creative evaluation methods can quickly give you a lot of data that can be hard to interpret. A significant number of responses can be created if participants are being evaluated before and after an exhibition, event, or other intervention. Depending on the number of drawings you have, you might need to analyse a sample of them rather than all of them, in which case choose a suitable sampling strategy. It is helpful to match up the before/after responses of individuals, so that you can analyse change for each person, rather than relying solely on group responses.

You could start by looking at specific elements, artefacts, or information that you are focussing on evaluating. You could look at how many times these appear in drawings, either individually or where they are in relation to other parts of the drawing. Simple analysis could then look at the proportion of drawings that include those items. For an example of a study using this methodology, see the Howlett and Turner paper in the further reading section below. Another method of analysing the data is to create a simple scoring system, where you give the whole picture a score based on how accurate it is, or what learning is visible. For example, your scale might be:

0 = an irrelevant drawing, or if doing before/after visit drawings: evidence of negative learning

1 = one or two relevant items; minimal positive learning

2 = many relevant items; demonstrable positive learning

3 = a detailed drawing with relevant items; significant positive learning

For an example of a study using this methodology, see the Jensen paper in the further reading section below.

Write your report, clearly laying out your method, the audience you worked with, the prompts you used and how you completed your analysis.

## **Cautions and caveats**

As with all evaluation, your results will be best when you have spent plenty of time thinking carefully about what you want to find out and who the target audience is. Asking participants to respond creatively might be unsuccessful if you have not planned carefully, and (as far as is possible) piloted first. Thinking through both what you want to know and the audience you are working with will help you to successfully adapt your evaluation for the relevant age, experience, and ability. You might need to provide alternative ways to evaluate alongside drawing and creative methods: can people use words creatively, for example.

Think through how your evaluation conclusions are going to be robust. Will you have another evaluator check a sample of your analysis so that you are both interpreting pictures in the same way or on the same scale? Include all of this in your final report.

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Drawings can be excellent illustrations in your final report or in presentations about the evaluation. You do need to have the correct permissions in place to use the pictures and be careful that the individuals in the audience you evaluated cannot be identified from what you are showing. You should decide from the beginning what you will do with the physical outputs. If your study included before and after drawings, you might have a lot of pieces of paper to scan or store. Check your venue's requirements for retention.

## Further reading and other resources

- Kate Howlett and Edgar C. Turner, 'What Can Drawings Tell Us about Children's Perceptions of Nature?', *PloS One*, 18.7, 2023.

This paper is based on research with primary school children from 12 schools in England. It involved the analysis of over 400 drawings that responded to the prompt: 'Please draw and label a picture of your garden or local park showing the animals you think live there. Tell us a little bit about what you have drawn below'. The drawings were analysed by listing the words and phrases used for animals and plants, then checking for items that were *not* included in each drawing. A helpful discussion draws out conclusions from the data. The drawing worksheet that was used and the information sheet that was sent out to participants are included in the appendices.

- Eric Jensen, 'Evaluating Children's Conservation Biology Learning at the Zoo', *Conservation Biology*, 28.4, 2014, pp. 1004-11.

In this paper Jensen was seeking to measure young people's learning around the topic of conservation biology following their visit to London Zoo. School pupils were asked to complete an evaluation form before and after their visit, responding to the prompt: 'Please draw your favorite wildlife habitat and all the plants and animals that live there. (Please put names or labels on everything)'. A three-point coding scale was used for the drawings, from negative development in learning (1 point), through no development (2 points) to positive development (3 points). The online version of the paper includes the evaluation questionnaires that were used for primary and secondary students before and after the visit.

- Kerri Kearney and Adrienne Hyle, 'Drawing out Emotions: The Use of Participant-Produced Drawings in Qualitative Inquiry', *Qualitative Research*, 4, 2004, pp. 361-82.

While this paper does not refer to museums or exhibitions, it introduces an alternative way of using drawings for evaluation, specifically with adults. In the research project, participants were asked to make two drawings on the theme of change. These images were used as the stimulus for discussion in an unstructured interview several weeks later, with participants describing what they had drawn and what it meant. The paper includes some basic analysis of using drawing to promote discussion in interviews.

- Tamara Kisovar-Ivanda, 'Thematic Analysis of the Children's Drawings on Museum Visit: Adaptation of the Kuhn's Method', *World Journal of Education*, 4, 2014, pp. 60-67.

A paper that specifically looks at the drawings that primary school children produce while in a museum, with a case study in Croatia. There is a good discussion of the history of using children's drawings, and a section on the methods used for the research, but it is light on analysis of the pictures themselves.

# Meaning Maps

Sarah-Jane Harknett

Meaning maps are a method of finding out a person's thoughts, feelings and ideas around a central theme or topic. Completing a meaning map can be non-linear, compared to a more didactic approach such as a formal questionnaire. Ideas can be linked on the page, joined with other concepts, and completed in any order. They can be successfully used with people of any age, including young children and groups. This method does require some literacy skills. They are an effective method to get individualised responses and work particularly well when used before and after an intervention (such an exhibition, taught session, or event). If used immediately after the intervention, meaning maps will only be finding out short-term changes, but they can also be used over a longer period of time. As it is a very flexible method, it can result in a lot of data to analyse. This should be factored in before deciding whether this is an appropriate method to use.

### How to do it

- Decide on central theme. Pilot it.

What is your central evaluation question about? What is the main theme of the exhibition or event that you are evaluating? Will you use one word, a phrase, or an image? It is usually helpful to pilot your meaning map with a small group of people who are like the population you will be sampling. You could run this pilot with two or three different central ideas and then compare the results. Which central concept needed a lot of explanation? Did one of the themes achieve a broad range of responses or did people stop coming up with ideas very quickly?

- Decide on a sampling strategy.

Who will you ask? Will your sample be stratified or random? What is your target number of completed meaning maps? In UCM, we aim for 20 to 30 meaning maps for exhibition evaluation.

- Decide what demographic information will be relevant to collect

What is necessary for you to know when you are analysing the results? Don't ask for demographic information that you do not need.

- Evaluate.

Approach the person before they engage with the exhibition/intervention/event. Introduce the project and its purpose. Ask if they would be happy to take part in pre- and post-event evaluation. If consent forms are being used, get them completed at this point, and give the participant an information sheet telling them what data is being collected, what will happen to it and how they can withdraw should they want to. Include the contact information for a member of staff.

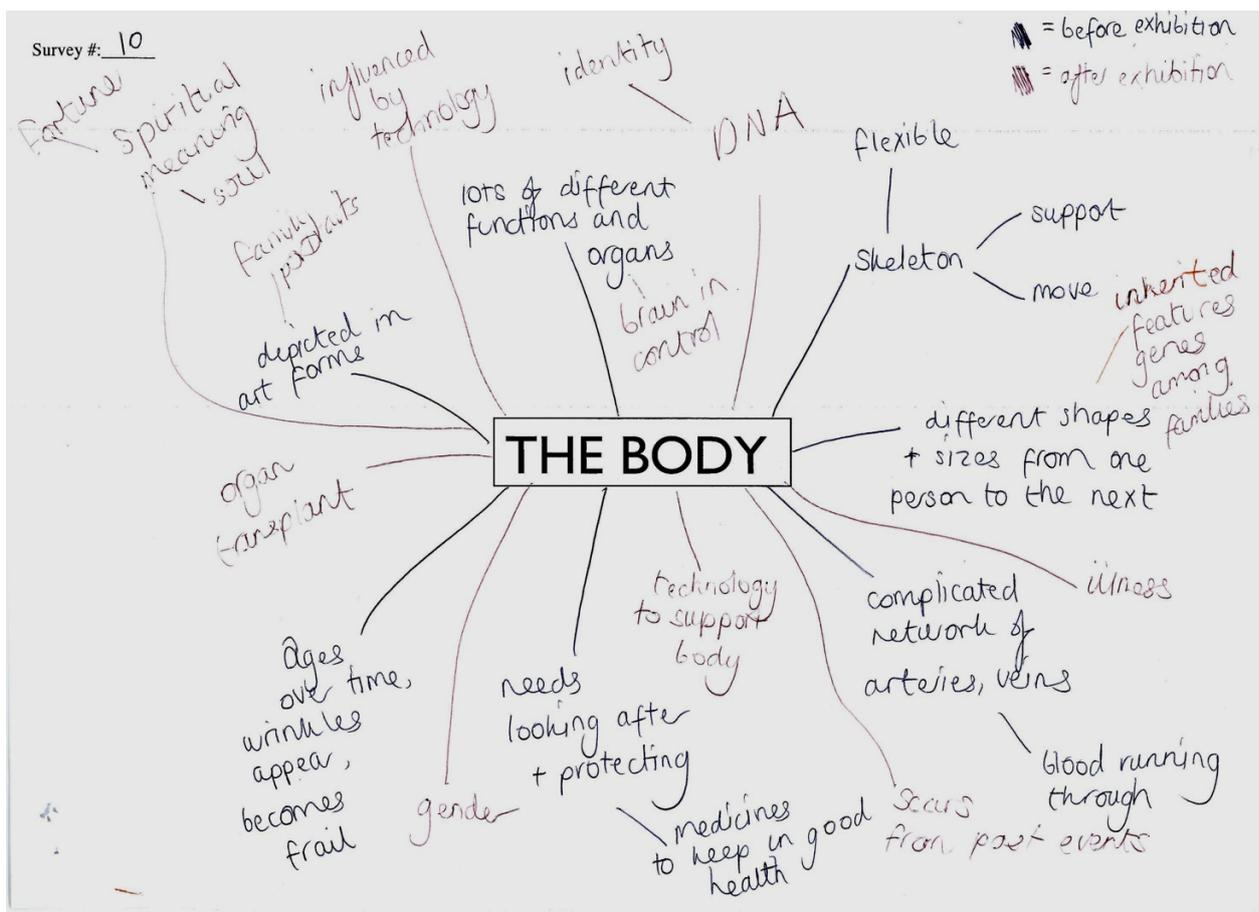
Show a completed meaning map on a different topic and talk it through. If you are happy for people to draw pictures in response to the theme rather than writing words, say that in the introduction. The meaning map you show people should have at least two initial ideas, preferably with some more branching words. Don't use one that has so many things on it that it might seem intimidating. Avoid showing or saying anything that might prime the visitor on the theme you are exploring.

Give them the blank meaning map to complete. If multiple people are carrying out the evaluation, it might be helpful for the sheet to have a space for the evaluator to add their initials. Ask the visitor

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to add their knowledge, opinion, thoughts, ideas, beliefs, experiences, facts, images, memories, etc: whatever comes to mind when they think of the target phrase. Reassure them that this is not a test! If they don't have very much to write that is fine. Sometimes people can worry about putting the 'right' thing, so encourage them to put down whatever comes to mind. Participants might ask whether their knowledge is correct before they put it on the sheet. Ask them to put their thoughts down anyway, and again remind them this is not a test. Ask any prompt or clarifying questions about things they have written or handwriting that you cannot read. You might want to write a script for the introduction and prompt questions so that it is the same for each person. The evaluator can add their clarifications or prompts onto the map but should use a different colour ink.

Take the completed meaning map. Ask the participant to include their initials or date and month of birth or some other means of identifying them. Give them the demographic survey to complete. Don't let them take the meaning map into the exhibition or event with them. Explain that you will return it afterwards. People that take the meaning map with them might write on it before the end. After the intervention, give them back the same sheet they filled in before, but with a different coloured pen. Ask them to add additional thoughts, ideas, feelings, or to explain anything that was already on the meaning map. Leave them to do this without intervention. When they have finished, ask any clarifying questions that you need to, again adding these to the map or your notes in



another colour ink. Make sure you have plenty of different pens with you.

Figure 1. Sample meaning map on the theme of 'The Body' showing visitor responses before and after visiting an exhibition.

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## How to analyse the data

In the analysis phase, the evaluator looks at the words used, and the structure of these words on the page. An initial step would be to simply list all words used both before and after the experience; these could be made into a word cloud or graphs. By counting and comparing the number of words insights might be gained into the range of knowledge and vocabulary about the theme.

A deeper analysis can then be carried out on the words and phrases. Are there any common themes that come from looking at the ideas on the meaning maps? Are there patterns? Again, at its simplest this could just be a count of the number of different themes or concepts each person mentions before and after their visit.

You might want to see whether visitors have mentioned specific exhibition elements in their responses. Can you link what they say to objects, cases, or text panels in an exhibition? Which are most frequently mentioned? Can you compare this to any visitor observation that has taken place? Are there signs that particular types of learning have happened? Has there been a change in attitude or an emotional response? Don't ignore any items that you think might be off topic for the theme or contents of the exhibition. These can sometimes give you an insight into what knowledge or understanding visitors are bringing to or taking away from their experience.

You could look at the number and range of words that are put next to the central theme, and those that are one, two or three branches further out. In the example above on the theme of 'The Body', before the exhibition visit the visitor wrote the first level phrase 'depicted in art forms'. Afterwards, they added a new level to insert 'family portraits'. These additional layers might imply an enhanced depth to their understanding. If your sample size is big enough, you might be able to draw conclusions about specific demographic groups by matching the patterns and theme.

## Ethics, safety, and security

All relevant museum staff should be fully briefed on the evaluation project before it begins. If gallery attendants are present in the area that visitors will be asked to complete meaning maps, they should be informed each time evaluation is taking place. Evaluators should always introduce themselves to visitor services staff before they begin their session and should always remain within sight of another member of staff or museum volunteer. The venue may request that the evaluator wear a badge, lanyard, or other identification. Your organisation or the venue may require you to submit an ethics application in advance.

Anyone evaluating visitors should be ready to explain what they are doing to any member of the public. If a visitor would like to withdraw from the study, the meaning map should be removed and disposed of. A note should be made that someone has withdrawn from the study. No personal details should be collected from (or given to) members of the public. If the evaluation is to be carried out with children, young people or vulnerable adults, the venue's ethics procedure should be carefully followed. The evaluator should follow venue requirements in case of emergency.

## Cautions and caveats

Meaning maps can be hard to analyse. They often become the highly personalised responses of an individual, so connections they make might not be immediately obvious to an outsider. An evaluator talking through what is written on the sheet can add a great deal of value to a study, so if it is possible for you to do this, it is recommended. The analysis itself can become highly personalised as well. How will you ensure your conclusions are robust? Can more than one

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evaluator look through and check the findings?

The importance of piloting the central theme cannot be underestimated. The better this is tested, the better your results can be, making sure they are useful and meaningful. This can take a lot of time; collecting the data can also be time consuming. If the exhibition or event you are evaluating is constrained by time, don't leave it too late before you start collecting responses.

## Further reading and other resources

- Tony Buzan, *Use Both Sides of Your Brain*, E. P. Dutton & Co., 1976; Tony Buzan *The Mind Map Book*, BBC Books. 1993.

The original texts describing mind maps.

- John H. Falk, Theano Moussouri, and Douglas Coulson, 'The Effect of Visitors' Agendas on Museum Learning', *Curator: The Museum Journal*, 41.2, 1998, pp. 107-20.

This paper is among the first to use meaning maps in a museum context. It positions the evaluation process within the constructivist approach to measuring museum learning and uses information from meaning maps alongside an assessment of the motivation of the museum visit. The case study is of adult visitors to an exhibition (Geology, Gems and Minerals) in the Smithsonian Institution's National Museum of Natural History in the United States. The meaning maps were used as part of an interview and visitors were also observed in the exhibition. It uses large sample sizes. Some discussion of the analysis of the meaning maps, mostly in comparison to visitor motivation.

- Anthony Lelliott, 'Using Personal Meaning Mapping to Gather Data on School Visits' in *Researching Mobile Learning*, edited by Giasemi Vavoula, Norbert Pachler and Agnes Kukulska-Hulme, Oxford, 2009, pp. 205-20.

A practical step-by-step guide to meaning maps, and a case study with 12- to 14-year-olds who visited either a planetarium or a radio telescope visitor centre in South Africa. A good summary of how meaning maps were used and analysed alongside interviews.

- Eugene Judson, 'Learning about bones at a science museum: examining the alternate hypotheses of ceiling effect and prior knowledge', *Instructional Science*, 40.6, 2012, pp. 957-973.

A paper looking at measuring learning in a science museum context, comparing meaning mapping to other pre-assessment tests of prior knowledge. There were 38 participants in the evaluation, aged 9 to 12 years old. The paper includes images of meaning maps and has a brief discussion on the methods used to analyse the data.

- P.S. Meier, 'Mind-Mapping: A Tool for Eliciting and Representing Knowledge Held by Diverse Informants', *Social Research UPDATE. Department of Sociology, University of Surrey*, 52, 2007.

A short, practical update from the University of Surrey on a slightly different use of meaning maps: as communication within a multi-disciplinary team and as the stimulus for discussions with the team and external stakeholders.

# Focus Groups and User Panels

Sarah-Jane Harknett

Focus groups and user panels bring together small groups of people to discuss specific topics, usually as part of a facilitated conversation. A focus group generally consists of people with some common thread between them for a session, which could be about an aspect of museum practice, or an output, such as an exhibition, display, object, or piece of text. The participants could be current or potential museum visitors or part of a particular group you have contact with. A user panel usually consists of multiple sessions, made up of a group of people from the target audience you are aiming at. User panels require more commitment from the participants as they are held over a longer period of time, meeting frequently and regularly.

As these are flexible, qualitative methods, both user panels and focus groups can generate a lot of data. The time it will take to analyse this should be considered before deciding whether they are an appropriate evaluation method for you to use. The depth of investigation and interrogation that both focus groups and user panels afford give a rare opportunity to delve deeper into people's motivations, thoughts, and emotions. They are a good way to find out the opinions of specific audiences and (unlike a questionnaire) give the opportunity to ask additional questions and clarify responses. Both techniques require a skilled facilitator.

### How to do it

- Plan.

The more time you can commit to planning, the better your results will be. Carefully think through everything that will be needed for successful sessions. Who will facilitate? Do you have someone internally who has the skill set to do this, or do you need to bring in someone else, such as a freelance facilitator? Think about the number of sessions you will need and the location where you will hold them; if you don't already have a budget allocated for this work, you might need to think about getting some funding for your project.

Consider how you will recruit the participants and how the people that you include are representative of the audience(s) you are interested in. How many people would you like to talk to? Focus groups work best when you have between 6 and 12 people. What sampling strategy will you use to recruit your participants? Ideally there will be some common ground between them; they could all be users or non-users of your venue or programme, or a mixture if there is another link between them. If you will be compensating people for their time or paying travel expenses, get payment processes and paperwork organised before you recruit. Remember that not everyone has a bank account, and some people find paperwork and forms both difficult and stressful.

Plan the session(s). Work out a timetable for each session, with key questions and a list of discussion points. Allow space in your schedule for things not to plan! Also allow time for people to get to know each other, especially if you are planning a user group that will go on for several months. How will you collect feedback from everyone, including people who might be less confident in speaking out in a group? You could ask participants to make notes during the session that you collect at the end. What will happen if not everyone in the group has strong literacy skills? Think about ways to break up the time to keep energy levels high. Refreshments are always welcome, or a

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comfort break if the sessions are online. What strategies will the facilitator use to prevent one or two voices from dominating discussions? Pilot the questions you are planning to ask.

Select your venue. Will the user group meet in the same place each week? Will the group work best in a neutral venue or in your museum? Would an online group be better for the research you are doing? The venue needs to be easy to get to and accessible for your participants. Plan for the main content of your session to last an hour or two but allow time at the beginning and end to help participants to arrive and settle in. Try to make an end point to the session; participants sometimes want to stay and chat, but the facilitators should try to avoid this if possible. If you are evaluating an exhibition, work out which specific area of the display you are evaluating for each session. You need to try to focus discussions on that limited area and allow the group time to see it and reflect.

- Recruit.

Your careful planning should help your recruitment to be more straightforward. You might need to recruit more people than you want to come in case there are some dropouts. Send out participant information sheets, consent forms, payment information, and details about where your session(s) will be held. Recruitment can be time consuming and difficult: allow plenty of time for this step.

You might choose to have a general call out and ask participants to apply to be part of the group. If you do this, decide in advance what your selection criteria will be and how the application process will work. The application method you use needs to be ethical, equitable, accessible, and appropriate to the audience you intend to work with. Tell participants in your promotional materials what the level of commitment will be: how many sessions will you expect people to attend and for how long? You could ask the participants to commit to a particular length of time, for example quarterly meetings for a calendar year, or one meeting a term for an academic year. This allows all parties to have an opportunity to reassess how things are going and their involvement. Plan the data, opinions, or information that you need to collect from applicants at the recruitment stage, but don't ask for too much. How will you store people's data securely? If you are delivering user groups over a long period of time, spend some time planning what your procedure will be for people that drop out.



*Figure 1: a user group of students*

- Deliver the focus group or user sessions.

Put into place all the planning when delivering the session(s). Your well-briefed facilitator will lead the discussions, using the pre-arranged prompts, questions, or objects. If other staff members will attend the session(s), brief them on what their role will be. Anyone who was directly involved in

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whatever you are discussing should have a very clear idea of what they are to say or contribute: for example, if the exhibition curator attends, they should be told what their role in the group is and how much they should talk. Be prepared to stop a member of staff if necessary. It might also be preferable to not invite people closely involved in whatever are evaluating to the focus group.

Decide how you will collect data from the focus group or panel. Recording them would give you a lot of data to transcribe and analyse. Another member of staff might be used as a note taker. They may find it helpful to create a diagram of who is in which position around the table or room. If participants make written notes or take part in an activity, gather these, and take photographs of any outputs. You could ask participants or facilitators to reflect on their experiences afterwards through a survey or reflective journal. Once the participants have left, the facilitator and other staff members present should take half an hour to debrief and discuss how the session went. Take notes or record this section, as this can be very valuable information.

- Think about how to end well.

As focus and user groups are about creating trusting relationships, you should put some thought into how you will end the session(s), so that you leave things on a good footing with the participants or the communities they represent. You might want to do some follow up analysis with your groups, either through surveys or reflective journaling. If you have involved groups in exhibition evaluation, they should be thanked appropriately in text, publications, or within the display space.

## How to analyse the data

Both focus groups and user groups will generally result in qualitative data, which can be very time-consuming to analyse. The method of data analysis you chose should work with the data you have collected. For example, you might ask participants to fill in a survey as part of the session, as well as the open-ended questions for discussion. These will need different approaches for the analysis. If you have recorded the session, don't expect to be able to produce full, in-depth, reports detailing every aspect of what happened in the group. You might not be able to produce a full transcript. It is often better to analyse the conversations in a broader way, looking for recurring themes or emotions from participants, any conclusions that are drawn, or recommendations that come from the group. Your report could be a general summary of the session or sessions, outlining the topics covered, rather than a comprehensive analysis of every aspect of the conversation. Acknowledge in your final report any difficulties you faced with recruitment and any biases that may have been introduced from the participants. Remember to include the reflections of the facilitators.

## Ethics, safety, and security

As with most evaluation, good planning is crucial so that everything is handled ethically and safely. Your organisation or the venue you are working with might require you to submit an ethics application, so check well in advance. Participant information sheets and consent forms should be clear and honest on the level of commitment required and when the group will end or be reviewed. As with all evaluation methods, participants should be made aware of what will happen with the information they provide as well as how and when they can withdraw from the evaluation. It can be hard to maintain confidentiality with focus groups, so have a plan for how you will keep information about participants, and who contributed specific comments, secure or if you will attribute them. As discussions continue, people in the group might say more than they wish to, but it can be harder for them to revoke consent in a group situation, so plan how you might handle an approach from a participant. If you have time, and it is an important part of your research, you might be able to check top level conclusions with the group participants at the end of the session.

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Carefully consider how to keep all participants and staff safe, both in terms of discussion topics, and the venue you use. There should never be need for two people to be alone, whether this is two participants, or a participant and a facilitator. Write a risk assessment and abide by the venue's ethics procedure. Special consideration should be given if focus or user groups are to be carried out with children, young people, or vulnerable adults, and this will require careful planning and additional risk assessment.

## Cautions and caveats

It is possible to run your own focus groups, but hard. As an evaluation method, they are strongly dependent on the skills and communication style of the facilitator. If you are running the group, you might need to develop your skills as a facilitator and interviewer first. You could try to join a focus group as a participant before leading them: this can be helpful for you to see how it works, what you think goes well and how you might improve when you are leading. You should not facilitate for a focus group or user panel on anything you've been involved with. Any staff member attending sessions should be fully briefed to know what their role is, and when they should contribute. The facilitator needs to know how to handle the personalities that attend, any inherent power dynamics or previous friendships. Groups that have prominent community leaders may lead other participants to defer to them and their opinions. When you are balancing the range of participants that you would like to attend, try to avoid potential clashes that may disrupt the discussions.

Both user and focus groups require strong, usually verbal, communication skills from the participants, so they may not be suitable for all audiences that you are working with. The facilitator will need to be aware that these methods can sometimes lead to 'groupthink': when everyone reaches a conclusion, but it may not be well thought through. If a user group is meeting over a long period of time, it might become a bit of an 'echo chamber' or it can get stale. Focus and user groups use small numbers of people; beware of making sweeping generalisations based on the results of your discussions. They work well when you use them alongside other evaluation methods.

## Further reading and other resources

- David L. Morgan, *The Focus Group Guidebook*, SAGE Publications, 1998; Richard A. Krueger, *Analyzing and Reporting Focus Group Results*, SAGE Publications, 1997.

These two short books, both SAGE publications, give a broad but practical overview of how to do focus groups and analyse the results. Sections on technology are showing their age, but there is still plenty of helpful information, with little focus on focus groups for marketing (which texts often assume as the primary purpose). Morgan's text is supported by frequent case studies. Krueger's chapter on 'Advice for First-Timers' and Morgan's on 'Ethical Issues' are both valuable reading.

- Emily Dawson, 'Reimagining Publics and (Non) Participation: Exploring Exclusion from Science Communication through the Experiences of Low-Income, Minority Ethnic Groups.', *Public Understanding of Science*, 27.7, 2018, pp. 772-786.

An enlightening paper which uses focus groups, interviews and accompanied visits to look at how specific audiences use (or don't use) science centres. Dawson uses quotes from group members throughout, talking sensitively about the audiences she works with for her focus groups.

- Damian Tissier and Samir Singh Nathoo, *Black and Minority Ethnic Engagement with London's museums*, Strategic Urban Futures, 2004.

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A downloadable summative report of some research in London with non-visitors from black and minority ethnic communities, through street surveys and focus groups. The conclusions of the report are interesting, the section on focus groups gives some basic information about how they were held, but there is no detail on the questions that were used to generate discussion, and it is very narrative-heavy.

- Caroline Reed, *Running a Revisiting Collections focus group*. Museums, Libraries and Archives Council and The Collections Trust (no date).

A thorough and thoughtful (downloadable) resource, originally developed for a series of focus groups getting information about museum and archive collections from communities. There are sections on practicalities of running focus groups, how to collect information and running the session. There are several suggested ways of working with the collections and how to gather responses from the participants. There are suggested forms for adapting to your situation and even ideas for the structure of the session.