

Accompanied Visits

Impact Evaluation Resources

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.

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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.



Figure 1: Accompanied visit at Cambridge University Botanic Garden

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.

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.

What do to 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 co-ordinating 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), 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.

- 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), 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.

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?



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