

RENAISSANCE
museums for
changing lives



Audience Data Collection Manual 2008

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1. Introduction

MLA has been collecting audience data from Hub Museums since 2003 using a shared set of templates, measures and definitions. Since April 2007 museums holding Designated Collections (DCHs) have been using these too. These guidelines are primarily intended for use by Hub Museums and DCHs but the measures and definitions set out here could be adopted (whole or in part) and used by any museum. MLA is developing from these a simplified, core set of five measures that it will be promoting for use by all museums in 2009/10.

Following consultation with Hubs, DCHs and DCMS these templates were revised in 2008. The measures and definitions are now fully aligned with those used by DCMS to monitor its sponsored institutions, as well as the National Schools Participation Database. The revisions have also eliminated certain areas of ambiguity in the definitions and guidance that their extension to the DCHs brought to light. In addition, advice about how to capture the data has been included, which it is hoped, along with the clarifications and amplifications, will help Hubs and others gather consistent data, check its robustness and develop standard procedures for collecting it.

2. Why collect data?

MLA collects data from museums to serve three main functions:

Monitoring and accountability

MLA is required by DCMS and ultimately Treasury to demonstrate how the funding for Renaissance is driving change in regional museums and galleries, and how they engage with, and serve communities. The Renaissance programme seeks to put users at the heart of services and engage people and communities by developing world class and sustainable museums. The information captured through these audience data collection templates is vital to measure progress against the Renaissance aim of increased engagement.

Advocacy

Through interpretation and analysis, the data develops into information, knowledge and ultimately evidence. Comprehensive, robust, consistent and accurate data serves as a powerful tool for MLA in persuading DCMS and Treasury to sustain and increase their investment in museums.

Strategic planning and programming

The quantitative data collected via the templates, when combined with other data from the Hub Exit Survey and other evaluation, can be used by both museums and MLA to inform planning and programming decisions, and help set future policy and strategy. Used in conjunction with other sources it gives museums the better understanding of their audiences that is vital to ensure audience needs and expectations are met and exceeded.

3. Quality Assurance

To serve these purposes the data have to be:

- As comprehensive as possible
- As consistent as possible
- As accurate and robust as possible

Comprehensive

The measures proposed will not capture everything, but they do give a detailed picture of the principal activities and services in relation to audiences that museums provide. Of course Hubs' and DCHs' data collection does not have to be limited to the measures set out here, and Hubs and DCHs are encouraged to devise their own indicators for measuring progress in meeting local objectives, and not covered by the templates here (for example, numbers of taught sessions, the ages of children engaged in outreach etc.).

In order to present a complete picture of activity, each site must return data for all of the measures. It is however acknowledged that for some measures e.g. web use and outreach, only service-wide data can be submitted.

Consistent

The data collection exercise for Renaissance involves over 200 museum sites. Gathering consistent data from all of them is a considerable undertaking which is why this manual sets out to be as detailed and clear as possible.

Consistency is vital for the construction of compatible regional and national pictures, for the construction of time-series and the comparison of performance over different reporting periods. The meaningfulness of data returns depends on the possibility of aggregating data, and comparing like with like.

An important aspect of consistency is, therefore, that everyone involved in the data collection exercise has the same understanding of the definitions and the terminology used. The use of particular terminology in the templates, for example, 'instances', 'visits' and 'visitors', is deliberate. It is defined and explained in the definitions section that accompanies each template. In addition key terms have been pulled out into a glossary for ease of reference.

Accurate and robust

MLA prefers actuals to estimates, but if estimates are provided, museums should explain why they have been provided, what they have been based on, and how they have been arrived at. At the end of each Template Chapter a section called Data Collection Methods gives advice and guidance on matters such as sampling.

4. Systems

In order for museums submitting data to MLA to manage their data collection efficiently and effectively, it is assumed that:

- In the case of Hubs or multiple site DCH museum services someone in each museum is responsible for gathering the raw data and sending it to the data coordinator.
- The data coordinator has overall responsibility for data collection and is responsible for collating the data across the Hub or DCH museum service, validating it, and presenting it to MLA.

MLA can only use the data in good faith. The Hubs are ultimately responsible for the accuracy and consistency of their data. This has to be sufficiently robust to stand up to investigation under audit.

Process

Capturing, presenting and accounting for the data on a quarterly basis is essentially a fifteen stage process, in which:

1. Individual museums/museum services collect the data
2. Individual museums/museum services check and verify the data
3. Individual museums/museum services present data to their data coordinator
4. Data coordinator collates the data from each Hub partner
5. Data coordinator (and Hub Manager where applicable) checks and verifies the data
6. Data coordinator presents the data to MLA
7. MLA checks and validates the data
8. MLA highlights omissions, queries and trends and returns data to data coordinator
9. Individual museums/museum services check and respond to queries and trends
10. Data coordinator presents responses to queries and trends to MLA
11. MLA verifies the returned submission, makes any revisions and returns data to data coordinator
12. Individual museums/museum services sign-off final data
13. MLA signs off final data
14. MLA presents the data to DCMS
15. DCMS uses the data in its bids to Treasury

Recording¹

Data is recorded on templates in an Excel workbook that consists of six worksheets (Templates 1-6), each with six columns (A-F):

Column A: Template description and list of museums

¹ see accompanying Excel workbook containing examples of blank templates

Column B: Quarter One data (April to June)
Column C: Quarter Two data (July to September)
Column D: Quarter Three data (October to December)
Column E: Quarter Four data (January to March)
Column F: Annual data (March to April – sum of Columns B+C+D+E)

There are some template measures where only an annual submission is required – this data should be provided as part of the Quarter Four submission.

Validation

Data received by MLA is micro-validated i.e. checked cell by cell to ensure that there is no missing data; each site's data for a quarter is also checked against the previous quarter(s) and against the same quarter in previous years.

Any anomalies, inconsistencies and trends are highlighted using different coloured cells in Excel with the following key:

Red = Missing value

Pink = Query on data

Orange = Value significantly higher than previous quarter/year

Green = Value significantly lower than previous quarter/year

MLA also macro-validate the data on a Hub level, to ensure that the data is consistent across all the sites within individual Hubs, and consistent between Hubs. All queries and responses are logged to provide an audit trail of any amendments made to the original data submitted.

5. MLA Tools

Since the outset of Renaissance, MLA has developed a number of tools for the collection and analysis of audience data.

These tools provide MLA with comprehensive, robust, consistent and accurate data across its funded organisations and enable MLA to advocate effectively to DCMS and Treasury, to sustain and increase their investment in the sector.

Used in conjunction with a range of other sources e.g. populations statistics, these tools can also provide museums, individually or collectively, with a better understanding of their audiences, insight that is vital to ensure audience needs and expectations are met and exceeded.

The harmonisation of definitions with DCMS sponsored institutions implemented from 2008-09 now means that comparisons can be made across a wider range of museums. The tools are also a useful benchmarking resource, enabling organisations to compare

and contextualise their performance against that of similar organisations, identified through benchmark clusters or groups for example.

This section describes the tools developed by MLA (in addition to the data collection templates), where and how the data can be accessed and how the data can be analysed and converted to information, knowledge and evidence.

Hub Exit Survey

The Hub Exit Survey is an annual national museum and gallery visitor profiling survey conducted for MLA by Ipsos MORI between 2003 and 2006 and by BDRC from 2007 onwards. Between 2003 and 2006 the survey was conducted as a snapshot during the October half-term period. From 2007 onwards, the research has been conducted as a continuous, year-round rolling survey.

In 2003, a baseline study was conducted in 45 museums and galleries across England, to provide data on the profile of visitors to Hub museums and galleries across the country, as well as information about visitor satisfaction and attitudes towards museums and galleries. The research has since been repeated each year since 2003 and now includes 47 Hub sites, representing every museum service within the Hubs.

The major objectives of the Hub Exit Survey are to:

- Collect reliable, consistent and accurate data on the profile of visitors to museums/galleries in each of the regional Hubs and overall
- Use the data to assess the success of the Renaissance investment both now and throughout the coming years

Hub Exit Survey data from 2003 onwards can be accessed and analysed using MLA's Dataset Analyser (see below).

Schools Participation Database

MLA Partnership, working with the Department for Culture, Media and Sport and the Department for Children, Schools and Families, has developed a strategic planning tool for museums – the Schools Participation Database. The tool is an online database that can be used to analyse school visits against for example, attainment figures, frequency of visiting, patterns of visiting, driving distance, socio-economic profiles, schools in areas of deprivation and ethnicity. The database can be found at <http://www.mlaschools.org.uk>.

School profile data included on the database includes: URN, LEA, DCSF Number, Address, Headteacher Information, Phase of Education, Type of Establishment, Number of Pupils, Number of Boys by Age, Number of Girls by Age, Gender, Religious Charter, School Capacity, Diocese, Government Office Region (GOR), Parliamentary Constituency, Ward.

The aim of the database is to give a national overview of school participation in museum learning activities as well as serving as a planning tool for individual venues.

By entering their data into the Schools Participation Database, museums can then use the database to:

- Create reports that demonstrate to stakeholders outputs related to education work
- Quickly and easily create quarterly and annual reports of school visits
- Understand how schools currently work with museums
- Identify and target local schools with free mailing lists that are available to export or print directly from the website
- Access up-to-date DCSF information about schools
- Access up-to-date socio-economic information about schools
- Use as a strategic management tool to provide information to support local and regional planning
- See an up-to-date picture of school participation

A number of standard reports can be run using the primary data entered into the Schools Participation Database by participating institutions (number of school visits, number of outreach contacts) and the secondary data also included in the database (DCSF School Attainment, ONS population statistics).

The reports can be run on a quarter-by-quarter basis, enabling analysis by calendar years (January to December), financial years (April to March) and approximate academic year (October to September) as well as seasonal pattern of visiting.

Standard reports available from the Schools Participation Database include:

- a) Participation levels of museums, libraries and archives i.e. how many of each, and what percentage within a region have submitted data
- b) Total number of school participations (i.e. all services provided) in museums, libraries and archives (shown separately) and categorised by Year Group, Key Stage and Hub/Government Office Region.
- c) Analysis of report b against previous years to identify trends
- d) Number of self-directed school visits to museums, libraries and archives (shown separately) categorised by Year Group [Template 1] and Key Stage
- e) Number of facilitated visits to museums, libraries and archives (shown separately) categorized by Year Group [Template 2] and Key Stage
- f) Number of Outreach visits by museums, libraries and archives (shown separately) categorised by Year Group [Template 3] and Key Stage
- g) Number of loans of collections/loan boxes by museums, libraries and archives (shown separately) categorised by Year Group and Key Stage

- h) Number of instances of work experience provided by museums, libraries and archives (shown separately) categorised by Year Group and Key Stage
- i) Number of instances of extended schools activity provided by museums, libraries and archives (shown separately) categorised by Year Group and Key Stage
- j) Number of instances of extended schools activity provided by museums, libraries and archives (shown separately) categorised by the service provided
- k) Number of instances of teachers in contact with institutions and broken down by contact type [Template 4] categorised by Year Group and Key Stage
- l) Numbers and percentages of children participating in museum, library and archive services, categorised by Year Group and Key Stage
- m) Participation levels for each curriculum area categorised by Year Group and Key Stage
- n) Participation levels for each funding source categorised by Year Group and Key Stage
- o) Analysis of school use
- p) School participation levels (percentage and number) for museums, libraries and archives, by drive time, LEA, Phase of Education, type of establishment, attainment, museum visits, ethnicity, socio-economic class, deprivation
- q) Details of participating schools by drive time, LEA, Phase of Education, type of establishment, attainment, museum visits, ethnicity, socio-economic class, deprivation
- r) Details of non-participating schools by drive time, LEA, Phase of Education, type of establishment, attainment, museum visits, ethnicity, socio-economic class, deprivation
- s) Participation levels (percentage and number) for museums, libraries and archives by key stage

In order to access the database, museums should contact MLA for more information and to get a password for access to the database.

Dataset Analyser

This web tool provides a series of tables and charts for interrogating statistical data relating to the museums, libraries and archives sector. The Dataset Analyser will be in the public domain by the end of 2008 and can be accessed by requesting a login and password from MLA. A number of datasets will be available for analysis including:

Renaissance Participation

The Renaissance datasets contain participation information for Hub museum sites including: total number of visits; school visits (with Year Group breakdowns); outreach and on-site participation (with adult and child breakdowns). Annual data is available from 2002-03. Quarterly data is available from 2005-06.

The Renaissance dataset can be used in one of two ways – either to analyse performance for one year or one quarter in isolation (Totals dataset) or to analyse trends in performance over time (Constant Sample dataset).

Totals dataset

The Totals dataset contains the data returns from all Hub museum sites within a given time period. This dataset is useful for examining the results within one time period (e.g. April to June 2005, or the financial year 2006-07).

Constant Sample dataset

The Constant Sample dataset contains the data that should be used for examining annual trends in performance. Not all sites have returned data for every submission period since 2002-03. This is due to a number of reasons e.g., site is newly opened or has been closed for renovations). Therefore it is not advisable to examine actual returned data (i.e. the Totals dataset) when comparing trends over time.

Hub Exit Survey

See above.

Taking Part

Undertaken by DCMS, Taking Part is the national survey of culture, leisure and sport.

Working in partnership with four partners: Arts Council England; English Heritage; the Museums, Libraries and Archives Council (MLA) and Sport England, DCMS commissioned the Taking Part survey with the aim of improving the current knowledge base of users and non-users of our sectors. The key objectives of this project are to:

- Provide a robust measurement of the Departmental Public Service Agreement (PSA) Target 3: Increasing participation and attendance amongst priority groups
- Meet the key data requirements of stakeholders around the general theme of participation, attendance and attitudes amongst individual DCMS targets at a national level
- Provide data comparable across different sectors

More details can be found at

http://www.culture.gov.uk/Reference_library/rands/taking_part_survey/

VisitBritain

The VisitBritain survey collects annual data from selected visitor attractions throughout England, and included visitor numbers and profiles, financial information and workforce profiles.

The dataset included on the Dataset Analyser included those museums, galleries and science centres that indicated in the VisitBritain survey that their information could be shared with MLA.

Cultural Workforce

The Cultural Workforce dataset provides details on workers within the sector, including:

- Employment type (e.g. contract, freelance, self-employed)
- Full-time and part-time
- Ethnicity
- Age
- Disability
- Gender

PSQG

PSQG is a survey of visitors to archives, providing information on both activities and satisfaction. Data is available for individual archive offices, with pre-calculated data for regions and England.

PLUS

The CIPFA Public Library User Survey dataset contains information about library user activities and satisfaction. Data is available for districts, counties, regions and England.

Public Library Statistics

The CIPFA Public Library Statistics is an annual survey of the presence, usage, assets and financials of libraries within the United Kingdom.

Generic Social Outcomes

The Generic Social Outcomes (GSOs) aim to describe and evidence the impact of museums, libraries and archives on users and communities. The GSO framework is a simple tool to help evaluate and plan improved services, and to support advocacy.

Details can be found at: http://www.mla.gov.uk/website/policy/Communities/gso_overview/

Inspiring Learning for All

The ILfA programme is designed to support the improvement of services in museums, libraries and archives and measurement of the impact of these improvements on people's learning. Includes advice on carrying out evaluation. This includes the Generic Learning Outcomes – a framework for measuring learning impact.

Details can be found at: <http://www.inspiringlearningforall.gov.uk>

6. Shared Definitions

In order to optimise the application of the data collected through the templates in the wider museum sector, one of the primary objectives in the revision process was to align all the Renaissance template definitions and measures with those collected by DCMS from their sponsored institutions - this has now been achieved.

Whilst MLA and DCMS don't collect *exactly* the same measures – the data gathered by MLA tend to be more granular, all the audience data gathered through the Renaissance data collection templates (and the Hub Exit survey) can be aggregated to correspond to DCMS's performance indicators.

The table below shows how DCMS's performance indicator data can be derived from the data collection templates and Hub Exit survey data.

DCMS Performance Indicator	MLA Measure
Number of visits to the museum/gallery	6.1
Number of unique website visits	6.3
Number of visits by children under 16	6.2
Number of visits by UK adult visitors aged 16 and over from NS-SEC groups 5-8	Apply Hub Exit survey results to 6.1 (total visits) minus 6.2 (visits by children under 16), minus overseas visits
Number of visits by UK adult visitors aged 16 and over from an ethnic minority background	Apply Hub Exit survey results to 6.1 (total visits) minus 6.2 (visits by children under 16), minus overseas visits
Number of visits by UK adult visitors aged 16 and over who consider themselves to have a limiting long-term illness, disability or infirmity	Apply Hub Exit survey results to 6.1 (total visits) minus 6.2 (visits by children under 16), minus overseas visits
Number of overseas visits	Apply Hub Exit survey results to 6.1 (total visits)
Number of facilitated and self-directed visits to the museum/gallery by children under 16 in formal education	Sum of Templates 1.1 to 1.13, 1.16, 1.18, 2.1 to 2.13, 2.16 and 2.18
Number of instances of children under 16 participating in on-site organised activities	Sum of Templates 5.1 and 5.2
Number of instances of children under 16 participating in outreach activities outside the museum/gallery	Sum of Templates 3.1, 3.2, 3.4 and 3.6
Number of instances of adults aged 16 and over participating in organised activities at the museum/gallery	Sum of Templates 1.14, 1.15, 1.17, 1.19, 1.20, 1.21, 1.22, 2.14, 2.15, 2.17, 2.19, 2.20, 2.21, 2.22 and 5.3
Number of instances of adults aged 16 and over participating in outreach activities outside the museum/gallery	Sum of Templates 3.3, 3.5 and 3.7
% of visitors who would recommend a visit	Hub Exit Survey

A document summarising the changes in the templates between 2007-08 and 2008-09 is appended.

7. Glossary of Terms

Adult - individual aged 16 or over.

Child - individual aged under 16. In the context of a school visit by Year 11 groups, all the pupils should be regarded as being aged under 16.

Facilitated school visit - a group visit to a museum that is led or heavily supported by a member of museum staff (including volunteers), or a person hired by the museum e.g. an artist, for at least part of the visit. A facilitated visit is one that has been planned and structured by teachers and museums staff to support the curriculum, with specific learning outcomes. Welcoming a school on arrival is not regarded as 'facilitating' the visit.

Instance - the number of participations by children and adults, as distinct from the number of children or adults participating. An individual may clock up several instances of participation in museum outreach activities over the course of a year.

Loan venue - any approved borrowing institution, organisation or exhibition facility (or individual researcher). In the event that a loan has been made to an individual (e.g. a researcher) that individual should be counted as a venue.

Organised activities - mediated activities, such as talks, lectures, workshops, courses, guided tours etc., led by museum staff, volunteers or freelancers employed by the museum. They do not include activities such as quizzes, trails, dressing-up, trips on steam trains etc., if the museum staff's only involvement is in handing out packs, badges, costumes, or driving a train etc.

Outreach - all collection or mission-related activities implemented by museums off-site (away from their own premises) including school programmes or lectures facilitated by a member of museum staff or staff hired by the museum.

Participation - the act of taking part in something. There is no requirement to monitor 'active' participation – participation at a workshop for example is essentially attending.

Self-directed school visit - a group visit facilitated by a person who is not a member of museum staff (volunteers should be regarded as museum staff)

Touring exhibition - exhibition staged away from the museum, possibly at another museum or gallery **OR** a 'non-traditional' venue such as a school, hospital, comedy club, community centre etc - there is no requirement for the exhibition to be staged at an accredited museum.

Website visit - sometimes known as a user session is a series of one or more Page Impressions, served to one User, which ends when there is a gap of 30 minutes or more between successive Page Impressions for that User.

Visit - a trip to a museum and a period of time spent there

Visitor - person who makes a visit to a museum

Template 1:

Number of self-directed visits by children and young people in formal education

Measures

Measure	Ref
Pre-5	1.1
Reception (Aged 4-5)	1.2
Year 1 (Aged 5-6)	1.3
Year 2 (Aged 6-7)	1.4
Year 3 (Aged 7-8)	1.5
Year 4 (Aged 8-9)	1.6
Year 5 (Aged 9-10)	1.7
Year 6 (Aged 10-11)	1.8
Year 7 (Aged 11-12)	1.9
Year 8 (Aged 12-13)	1.10
Year 9 (Aged 13-14)	1.11
Year 10 (Aged 14-15)	1.12
Year 11 (Aged 15-16)	1.13
Year 12 (Aged 16-17)	1.14
Year 13 (Aged 17-18)	1.15
Pre-5 to Year 11 (Wales, Scotland, NI)	1.16
Year 12-13 (Wales, Scotland, NI)	1.17
Pre-5 to Year 11 (Overseas)	1.18
Year 12-13 (Overseas)	1.19
Higher Education (England)	1.20
Higher Education (Wales, Scotland, NI)	1.21
Higher Education (Overseas)	1.22
Age unknown	1.23

Definitions

A **self-directed visit** is a group visit facilitated by a person who is not a member of museum staff. In this instance, volunteers should be regarded as museum staff.

This template is intended to capture visits by children and students in pre-booked educational groups (or educational groups who register on their arrival at the museum), and **which are essentially in support of the curriculum OR vocational courses (NVQs, BTECs), diplomas, foundation courses OR undergraduate/postgraduate studies**. It includes children in identifiable SEN units or SEN schools but does not include

visits by children being educated at home. Children that are home educated should be included in Template **5.1** or Template **5.2** if a member of museum staff facilitates their visit, otherwise they should just be captured under Template 6.2.

Please note that **visits** and **visitors** are different. A **visit** (which is asked for here) refers to a trip to a museum and a period of time spent there. A **visitor** is the person who makes that visit. The distinction is important, as the following suggests: 'I am a museum visitor. I visit the same museum at least five times a year. I go to other museums too.' In data collection terms, we are looking at one visitor, but upwards of five visits.

Take care to avoid double counting. Any one class that visits a museum in the morning and returns that afternoon for a second session should be counted as having made **one visit**.

Specific Definitions

Measures **1.1** to **1.15** should only include visits by pupils at schools in **England**.

For measures **1.18**, **1.19** and **1.22**, **overseas** refers to schools or colleges that are located outside the UK or foreign language schools based in England, Wales, Scotland or Northern Ireland.

Visits from schools in the Isle of Man or Channel Islands should be regarded as **overseas** visits as these islands are not part of the United Kingdom.

Visits by children in reception classes in mainstream schools should not be included in **1.1** (they should be in the next row down **1.2**). Measure **1.1** should cover visits by other organised groups, which may include playgroups, nurseries, toddler groups, Sure Start groups etc.

Measure **1.2** should include 4–5 year olds whose class in a mainstream school may not actually be called 'Reception'.

Measures **1.14**, **1.15**, **1.17** and **1.19** should include any older students (aged 19 or over) still attending mainstream schools, and colleges of Further Education. It should not include students in Higher Education – these should be included in measures **1.20**, **1.21** or **1.22**.

If students visiting the museum attend institutions that run FE and HE courses, the measure under which their visit is recorded is determined by the type of institution (HE or FE), not the level of study. Visits from FE institutions should be recorded under measures **1.14**, **1.15**, **1.17** or **1.19**; visits from HE institutions should be recorded under measure **1.20**, **1.21** or **1.22**.

If visiting FE colleges are unable to provide museums with a Year 12/Year 13 breakdown, the museums should distribute the visits equally between Year 12 and Year 13. If the FE college is able to provide an age breakdown, students aged 16 should be regarded as Year 12, students aged 18 or over should be regarded as Year 13 and visits by students aged 17 should be distributed equally between Years 12 and 13.

For measure **1.20** at university museums, if students visit for a supervision session or tutorial with a member of the museum staff who is their supervisor or tutor, this should be regarded as a **self-directed** visit. If a member of museum staff provides a special session for a tutorial group from the university, possibly with access to specific parts of the collection, this should be regarded as a **facilitated** visit.

Illustrative Questions and Answers

1. Visits by students at FE colleges

Should visits by students on BTEC, NVQ courses etc at Further Education colleges be included under Year 12 and Year 13, or does the template just measure visits from Year 12 and Year 13 students who attend secondary or middle schools?

Response

Yes - visits by students on BTEC, NVQ courses etc at Further Education colleges should be included as Year 12 or Year 13 visits, together with visits from Year 12 and Year 13 students who attend secondary or middle schools. The same applies for Template 2.

2. Visits by foreign language schools

Under which part of Template 1 should visits by students at foreign language schools based in England be recorded? Should they be recorded under the appropriate Year Groups for Pre-5 to Year 13, or should they be recorded as visits by overseas students?

Response

Templates 1 and 2 are intended to capture visits by schools in England essentially in support of the curriculum or FE and HE studies. Students attending foreign language schools **based in England** who visit the museum **should be recorded as overseas visits** under measure **1.18, 1.19 or 1.22**. The same applies for Template 2. Visits by students at foreign language schools based in Wales, Scotland or Northern Ireland should also be recorded as **overseas visits**.

3. Students on Foundation Year courses

Under which template should visits by students on Foundation Year courses be recorded?

Response

If the students are attending the Foundation Year course at a Further Education college (as opposed to an HE college) they should be recorded as Year 12 or Year 13 visits. If they're attending the Foundation Year at a HE college or university, they should be recorded as HE visits. The same applies for Template 2.

4. Summer School visits

Under which template should visits by students at Summer Schools be recorded?

Response

Visits by Summer School students that are in support of the curriculum (e.g. connected with retaking GCSEs, residential specialist science week for GCSEs etc) should be recorded under the appropriate Year Groups in Template 1 or Template 2. Visits by Summer Schools of foreign language groups, either based in England, elsewhere in the UK or overseas should be recorded as '**overseas**' visits in Template 1 or Template 2.

5. Visits by Special Educational Needs (SEN) children or SEN units and schools

Under which template should visits by SEN pupils be recorded?

Response

Visits by SEN pupils should be recorded under the appropriate Year Groups. Data gathered through the Schools Participation Database will enable visits made by SEN pupils to be quantified separately to those from pupils at mainstream schools.

6. Visits by mature students

Under which template should visits by mature students be recorded?

Response

Visits by mature students should be recorded according to the type of institution they are visiting with. If they are visiting as part of an FE college visit, they should be recorded under Year 12 or Year 13; if they are visiting with a Higher Education institution they should be recorded as HE visits.

Data Collection Methods

Data on the number of children expected to visit the museum and their year groups should be collected on electronic booking systems or on paper booking forms (and subsequently

recorded electronically). This should be the responsibility of the member of staff who takes the booking.

The number of children for whom bookings have been made should be checked against a head count of arrivals - this may be done by front-line staff. The data filed should describe the **actual** number of children visiting.

Details of any educational groups who visit without pre-booking, but announce themselves on arrival, should also be gathered - this may also be done by front-line staff.

If a school arrives with a mixed year group, it is recommended that the visits are distributed equally between each year group within the range of year groups visiting.

Template 2:

Number of facilitated visits by children and young people in formal education

Measures

Measure	Ref
Pre-5	2.1
Reception (Aged 4-5)	2.2
Year 1 (Aged 5-6)	2.3
Year 2 (Aged 6-7)	2.4
Year 3 (Aged 7-8)	2.5
Year 4 (Aged 8-9)	2.6
Year 5 (Aged 9-10)	2.7
Year 6 (Aged 10-11)	2.8
Year 7 (Aged 11-12)	2.9
Year 8 (Aged 12-13)	2.10
Year 9 (Aged 13-14)	2.11
Year 10 (Aged 14-15)	2.12
Year 11 (Aged 15-16)	2.13
Year 12 (Aged 16-17)	2.14
Year 13 (Aged 17-18)	2.15
Pre-5 to Year 11 (Wales, Scotland, NI)	2.16
Year 12-13 (Wales, Scotland, NI)	2.17
Pre-5 to Year 11 (Overseas)	2.18
Year 12-13 (Overseas)	2.19
Higher Education (England)	2.20
Higher Education (Wales, Scotland, NI)	2.21
Higher Education (Overseas)	2.22
Age unknown	2.23

Definitions

A **facilitated visit** is a group visit to a museum that is led or heavily supported by a member of museum staff (including volunteers), or a person hired by the museum e.g. an artist, for at least part of the visit. A facilitated visit is one that has been planned and structured by teachers and museums staff to support the curriculum, with specific learning outcomes. Welcoming a school on arrival is not regarded as 'facilitating' the visit.

This template is intended to capture visits by children and students in pre-booked educational groups (or educational groups who register on their arrival at the museum),

and **which are essentially in support of the curriculum OR vocational courses (NVQs, BTECs), diplomas, foundation courses OR undergraduate/postgraduate studies.** It includes children in identifiable SEN units or SEN schools but does not include visits by children being educated at home. Children that are home educated should be included in Template **5.1** or Template **5.2** if a member of museum staff facilitates their visit

Please note that **'visits'** and **'visitors'** are different. A **visit** (which is asked for here) refers to a trip to a museum and a period of time spent there. A **visitor** is the person who makes that visit. The distinction is important, as the following suggests: 'I am a museum visitor. I visit the same museum at least five times a year. I go to other museums too.' In data collection terms, we are looking at one visitor, but upwards of five visits.

Take care to avoid double counting. Any one class that visits a museum in the morning and returns that afternoon for a second session should be counted as having made **one visit.**

Specific Definitions

Measures **2.1** to **2.15** should only include visits by pupils at schools in **England.**

For measures **2.18, 2.19 and 2.22, overseas** refers to schools or colleges that are located outside the UK or foreign language schools based in England, Wales, Scotland or Northern Ireland.

Visits from schools in the Isle of Man or Channel Islands should be regarded as **overseas** visits as these islands are not part of the United Kingdom.

Visits by children in reception classes in mainstream schools should not be included in **2.1** (they should be in the next row down **2.2**). Measure **2.1** should cover visits by other organised groups, which may include playgroups, nurseries, toddlers' groups, Sure Start groups etc.

Measure **2.2** should include 4-5 year olds whose class in a mainstream school may not actually be called 'Reception'.

Measures **2.14, 2.15, 2.17 and 2.19** should include any older students (aged 19 or over) still attending mainstream schools, and colleges of Further Education. It should not include students in Higher Education – these should be included in measure **2.20, 2.21 or 2.22.**

If students visiting the museum attend institutions that run both FE and HE courses, the measure under which their visit is recorded is determined by the type of institution (HE or FE), and not the level of study. Visits from FE institutions should be recorded under

measures **2.14, 2.15, 2.17 or 2.19**; visits from HE institutions should be recorded under measure **2.20, 2.21 or 2.22**.

For measure **2.20** at university museums, if students visit for a supervision session or tutorial with a member of the museum staff who is also their tutor or supervisor, this should be regarded as a **self-directed** visit. If a member of museum staff provides a special session for a tutorial group from the university, possibly with access to specific parts of the collection, this should be regarded as a **facilitated** visit.

Illustrative Questions and Answers

7. Home educated children on a visit

Under which template should children who are Home Educated be counted? They may or may not pre-book a visit, but once at the museum they attend a guided tour or other facilitated activity.

Response

Templates 1 and 2 are intended to capture visits made by pupils at maintained and independent schools in England. Visits by children that are Home Educated should only be recorded under Template **6.2** (Under 16 visits) if they don't participate in any organised activities on-site. If the children do participate in organised activities, they should also be counted under Template **5.1** (Number of instances of Under 5s participating in organised activities at museums, but not visiting with their school), or Template **5.2** (Number of instances of 5 to under 16 participating in organised activities at museums, but not visiting with their school).

8. Facilitated vs self-directed visits

When does a 'self-directed' school visit become a 'facilitated' school visit? If a member of museum staff provides the school group with an introductory talk, does this count as a facilitated visit? If part of the visit involves a museum demonstrator, does this count as a facilitated visit?

Response

A facilitated school visit is one that has been planned and structured by teachers and museums staff to support the curriculum, with specific learning outcomes and which is directed, or led by a member of museum staff (including volunteers) for at least part of the visit. Welcoming the school on arrival, providing an introductory talk or 'spontaneous' activity with a museum demonstrator whilst on the visit **does not** make it a facilitated visit.

Data Collection Methods

Data on the number of children expected to visit the museum and their year groups should be collected on electronic booking systems or on paper booking forms (and subsequently recorded electronically). This should be the responsibility of the member of staff who takes the booking.

The number of children for whom bookings have been made should be checked against a head count of arrivals - this may be done by front-line staff. The data filed should describe the **actual** number of children visiting.

Details of any educational groups who visit without pre-booking, but announce themselves on arrival, should also be gathered - this may also be done by front-line staff.

If a school arrives with a mixed year group, it is recommended that the visits are distributed equally between each year group within the range of year groups visiting.

Template 3:

Number of instances of children, young people and adults participating in museums' outreach activities

Measures

Measure	Ref
Number of instances of children Under 5 participating in museums' outreach activity	3.1
Number of instances of school age children (aged 5 to under 16) participating in museums' outreach activities organised by their school (including those taking place in school)	3.2
Number of instances of young people aged 16–19 participating in museums' outreach activity organised by their school or college (including those taking place in school or college)	3.3
Number of instances of school age children (aged 5 to under 16) participating in museums' targeted and tailored outreach activities NOT organised by their school	3.4
Number of instances of adults (aged 16 and over) participating in all museums' targeted and tailored outreach activities	3.5
Number of instances of school age children (aged 5 to under 16) participating in museums' self-selecting outreach activities NOT organised by their school	3.6
Number of instances of adults (aged 16 and over) participating in all museums' self-selecting outreach activities	3.7
Number of visits by school-age children (Under 16) at touring exhibitions implemented by museums	3.8
Number of visits by adults (aged 16 and over) at touring exhibitions implemented by museums	3.9
Number of children's and young people's groups participating in museum activities on and off site (annual)	3.10
Number of predominantly adult groups participating in museum activities on and off site (annual)	3.11

Definitions

Instance is used here to acknowledge the difference between a child or adult and his/her participation in museums' outreach work. The measure is asking for the number of participations by children and adults, as distinct from the number of children or adults participating. An individual may clock up several instances of participation in museum outreach activities over the course of a year.

Participation is the act of taking part in something. An individual (or participant) may participate in education programmes more than once a year. There is no requirement to monitor ‘active’ participation – participation at a workshop for example is essentially attending.

Outreach includes all collection or mission-related activities implemented by museums off-site (away from their own premises) including school programmes or lectures facilitated by a member of museum staff or staff hired by the museum.

It should not include programmes reaching users through the mass media (i.e. radio, television or websites), or simply by the provision of an un-staffed stand at a conference or show.

At university museums, any activity taking place off-site but on-campus should NOT be included as outreach.

This template measures outreach delivered in England, elsewhere in the UK or overseas.

Where outreach cannot be attributed to a specific venue, it can either be reported as a service-wide or Hub-wide activity.

In the context of some of the PIs (**3.4, 3.5, 3.6** and **3.7**) “outreach” has been further broken down into two categories:

- Targeted and tailored
- With self-selecting audiences

This is to enable a distinction to be drawn between the resource-intensive, targeted, tailored outreach done with identified individuals, and the more general, broadly-aimed outreach activity, that may (or may not) be targeted at identified groups, but is not tailored to meet the needs of known individuals.

Outreach falls into the first category when the activity has been planned for/with a known audience. Objectives/intended outcomes for those participating in the outreach will be identified before (or possibly during) the outreach.

Examples might include:

- Working with the Brownies on a local history project;
- Working with disaffected young people to build their self confidence through a photography project;
- Working with asylum seekers to collect community artefacts to help engender a sense of identity and belonging;

- Working with mothers and toddlers using collections to stimulate creativity and communication;
- Reminiscence work with people with mental health difficulties

Outreach falls into the second category when those participating are self-selecting and not identified beforehand by the museum. This type of outreach may still be targeted to some extent (e.g. designed with a specific local community in mind) but it may have broader aims such as raising awareness about the museum and the services it offers, and encouraging people to make a visit in the future. The crucial difference is that the museum will not know beforehand the individuals it will be coming into contact with. The numbers involved may often (although not necessarily) be much larger than those a museum reaches through its targeted, tailored work.

Examples might include:

- Taking a vintage car from the collection to a rally, accompanied by museum staff able to engage with those attending.
- Taking a Shire horse to a ploughing match, along with associated items from the collection, and someone able to answer questions about the history of ploughing/Shire horses etc
- Having a stand at a county show with objects from the museum's collections and someone qualified to engage those visiting the stand in discussion about the objects and the work of the museum.

Visits to touring exhibitions (see definition below) should not be included under outreach, as an exhibition does not have the same focus on an active engagement with audiences.

A **touring exhibition** is one staged away from the museum, possibly at another museum or gallery **OR** a “non-traditional” venue such as a school, hospital, comedy club, community centre - there is no requirement for the exhibition to be staged at an accredited museum. For the purposes of the MLA audience data collection templates, to count as an exhibition, there would be an expectation it would include **real objects** from museum collections, either from one museum or a group of museums working collaboratively.

Real objects include accessioned items from a museum's collection, non-accessioned objects borrowed from artists, dealers or private collections, specially commissioned work or artwork that had been produced as part of outreach projects.

Visits to touring exhibitions staged in partnership with overseas venues, where all the objects are from museums outside the UK should be included here – there is no requirement for the exhibition objects to be drawn exclusively from UK museum collections.

The visits from a touring exhibition which consists entirely of graphic panels, for example, would only count where the museum had thoroughly and creatively explored all the options, but found it impossible, for reasons of security or health and safety, to include real museum objects. There is a strong presumption that this would only be the case when using non-traditional venues. If an exhibition is modular – it has both objects and graphic panels at some venues but only graphic panels at others (for reasons cited above), visits counted at all venues should be reported. There is no expectation that touring exhibitions in non-traditional venues are staffed.

Groups are, in effect, self-defining, and do not have to be formally constituted. They could range from the highly organised and formally constituted such as the Women’s Institute through to much looser, informal congregations such as members of an evening class who under their own initiative are following up on a subject with the museum. The defining characteristic of a group is that it sees itself as such.

Specific Definitions

Measure **3.1** should include number of instances of children taking part in outreach both through schools and nurseries as well as community groups or initiatives such as Sure Start.

Measures **3.1**, **3.2** and **3.3** should include the number of instances of children participating in activities organised by, or involving, museum staff which take place in nurseries/schools/colleges. It can, for instance, include children in assemblies and classes addressed by museum officers. These measures can also include loan boxes that are accompanied by a museum’s education officers or specialist/expert staff such as university lecturers working with the museum’s collection. It can also include loans boxes used by teachers but **ONLY** if they have received formal training from a member of museum staff.

Measure **3.3** should **ONLY** include outreach activity with 16–19 year olds done through school or colleges i.e. those in Year 12 and Year 13 at school or college or studying for an FE qualification at an FE college. Any outreach with 16–19 year olds done through non-school/college groups should be included in measure **3.5** or **3.7** for either targeted or untargeted adult outreach.

Measure **3.6** should include number of instances of children participating in activities at youth groups, community centres etc. These may include children participating in activities that include ‘accompanied’ loan boxes.

In respect of measures **3.8** and **3.9**, for a museum to count visits to a touring exhibition the museum must have been involved in the development of the exhibition. Visits to exhibitions where a museum’s only involvement is the loaning of items from its collection should not be counted.

Measure **3.10** and **3.11** are annual measures and should be a count of the total number of different groups involved with the museum in a twelve-month period. This is **not** a count of the number of contacts made between individual groups and the museum, nor is it a count of the individuals within groups. 3.10 and 3.11 are **not** required as a quarterly submission to prevent double counting where museums are working with the same groups over extended periods of time.

Museums are not required to split these measures into separate on-site and off-site totals. To count as on-site participation the group must take part in an organised activity (as defined under Template 5) and not simply visit.

Measure **3.10** should include groups predominantly i.e. more than half made up of under 16s. Measure **3.11** should include groups predominantly made up of adult groups (16s and over). They may be involved in the museum's social inclusion activity but it also covers specialist interest groups such as local history societies, Brownies, Friends' groups etc. Schools and nurseries should not be regarded as groups.

Individuals who are members of the groups recorded under **3.10** and **3.11** should also have their instances of participation recorded under the relevant measures in Template 3 and Template 5.

Illustrative Questions and Answers

9. Inclusion of attendance at conference talks and lectures as outreach

Could instances of museum staff giving talks or presentations at conference be included as outreach activity? Under what circumstances, to what type of audience, does a talk to an outside body qualify as an outreach activity?

Response

The guidance states that outreach activities should include all collection or mission-related programmes implemented by museums off-site (away from their own premises) including school programmes or lectures facilitated by a member of museum staff or staff hired by the museum. Outreach contacts should only include collection or mission-related work with **members of the public** (however specialist) and should not be extended to work with peers/other museum professionals as at conferences.

10. Difference between loan boxes and touring exhibitions

What is the difference between outreach contact via a school loan box and a touring exhibition?

Response

Outreach contact via a school loan box involves a structured activity designed by teachers and museums staff, with specific learning outcomes. A visit to a touring exhibition is regarded as a self-directed contact.

11. Outreach activities with “gatherings” e.g. children’s birthday parties

Can a handling session with an Education Officer at a child’s birthday party be included under Template **3.1** (Number of instances of children Under 5 participating in museums’ outreach activity) or Template **3.4** or (Number of instances of school age children (aged 5 to under 16) participating in museums’ targeted outreach activities NOT organised by their school)?

Response

Yes this counts as outreach work. The children at the birthday party, would not however constitute a “group” for the purposes of Template measure 3.10 (Number of children’s and young people’s groups participating in museum activities on and off site) as they would not recognise themselves as a group in that sense.

12. University groups

Can work with University groups be included in Template **3.11** (Number of predominantly adult groups participating in museum activities on and off-site)?

Response

Yes, university students that **participate in museums activities** can be included in this count if that activity is done through a University club or society. Groups of students that should be excluded are those visiting the museum with other students on the same course, as part of their undergraduate or postgraduate studies.

13. Parents and teachers at child outreach events or activities

Can teachers and parents present at outreach activities e.g. handling sessions based in schools be counted under Template **3.7** or **3.8**?

Response

No. As the handling sessions have been designed specifically for children, any parent or teachers present cannot be counted. The only exceptions to this are Family Learning activities that take place in a school but have been developed for children and parents working together. In this instance, the parents should be recorded under Template **3.5**

(Number of instances of adults aged 16 and over participating in all museums' targeted outreach activities).

14. Touring exhibitions at other venues

If a touring exhibition is staged at another museum or gallery, how can this be recorded to avoid double counting, as these visits will also contribute to the 'home' venue's total visits count?

Response

Any submission for touring exhibitions should be accompanied by a note with details of the name of the exhibition, the venue at which the exhibition was staged and the dates. If the exhibition has been developed by more than one museum, the visits should only be reported in one venue's submission with a note detailing the contributing museums. In this instance, the total number of visits to the exhibition will be attributed equally to each contributing museum.

15. Videoconferencing

Can an event that's been run via videoconferencing count as outreach?

Response

Yes, videoconferencing events can count as outreach if a member of museum staff or staff hired by the museum remotely facilitates the event. For example, if a class uses a loan box and the teacher hasn't been trained to deliver the handling session but videoconferencing is used to enable a member of museum staff to facilitate the session remotely, this can be counted as outreach.

Data Collection Methods

It is expected that the museum's Outreach Officer(s) will keep a diary of outreach activities and that instances of participation in these events are recorded electronically on a database or spreadsheet.

For targeted and tailored (TT) outreach, it is anticipated that in many cases, the instances of participation can be recorded via head-counts or clicker-counts, conducted either by the museum's Outreach Officer or other member(s) of museum staff in attendance.

Where it is not possible on the basis of the scale of activity or time to undertake a count (or census) of instances of participation in outreach, particularly self-selecting outreach, **sampling** methods can be employed to estimate the number of instances of participation.

Sampling Methods: Surveys

If it not possible to count all the instances of participation in outreach activities during the course of a day, a proportion of attenders could be sampled to provide an estimate of the number of instances of participation. This is dependent on the total number attenders at the outreach event being known. If the number of attenders is not known, see section on 'Estimating numbers of attenders at an event'.

'Surveys' could be conducted randomly by members of museum staff or volunteers (approach every 3rd or 5th person exiting) and at the most basic level could simply ask at the point of exit "Did you participate in any activities today, and if so, how many?" This question should be repeated to a manageable percentage of people leaving the museum at different times throughout the day.

By asking this question, the proportion of visitors participating in outreach activities can be calculated. When multiplied by the total number of visitors to the outreach event on that day, this will give the total number of people participating in one or more outreach activities.

Multiplying the number of people by the average number of instances of participation per person will give the total number of instances of participation in outreach activity.

Sample Size

In undertaking surveys, the question is often asked about what is an adequate sample size to ensure that the results are statistically robust. This depends on a number of factors including the acceptable confidence level, margin of error and the estimated percentage result. Most research studies adopt a confidence level of 95% and a margin of error of 5% is accepted as reasonable. The final factor that determines the sample size is the percentage result. For example, if it is predicted that 50% of attenders will have participated in an event this is the 'worst case' split and would require a larger sample size (384 in table below) than if say it was estimated that 20% of attenders had participated in an event (246 in table below).

The table below shows the sample sizes required at 95% confidence level and a margin of error of 5% for a range of percentage results from 5% to 95%.

Sample Sizes at 95% Confidence Interval and 5% Margin of Error

Percentage Results	No of Responses
50%	384
45% or 55%	380
40% or 60%	369
35% or 65%	350
30% or 70%	323
25% or 75%	288
20% or 80%	246
15% or 85%	196
10% or 90%	138
5% or 95%	73

Estimating numbers of attenders at an event

If it is impractical to count all the attenders at a large outreach event, a proportion of the attenders could be sampled. The basic assumption behind this estimation method is that an accurate 'hard count' of people who complete an event-related action is available. Definable actions could include the number of people who bought a drink or snack, the number of people who pick up a map, or the number of people who attend a particular activity, such as a talk.

The second piece of information required is acquired by sampling a proportion of attenders as they exit the event. A question relating back to the definable action must be asked e.g. if the total number of events attended was a definable action, the question would be "Did you attend a talk, and if so, how many?" This question should be repeated to a manageable percentage of people leaving the event.

By asking this question, the average number of times that a person did some action while at that event can be calculated. The number of people attending the event can then be estimated by taking the 'hard count' of those attending a talk (X) and dividing it by the average number of talks per person estimated by the exit sample (Y). If a person didn't attend a talk they should still be included in calculating the average, with an entry of '0'.

Total number of attenders = Total attendance at talks (X) ÷ Average number of talks attended (Y)

Estimating numbers of visits at a touring exhibition

If a touring exhibition is staged at a museum without automated counting devices e.g. beam counter, magic eye etc the number of visits could be recorded through a variety of methods:

Manual count

If the exhibition is permanently staffed the number of visits can be measured via a manual clicker count.

Sampling: Headcounts

If the exhibition can only be staffed for limited periods, a sampled count could be undertaken, ensuring that counts are done at different times of the day, on different days of the week, during school holiday and non-holiday periods to obtain an average count for each different 'type' of day e.g. Fridays on a school holiday. This average count is then multiplied by the number of days of each type that fall within the exhibition period to give the total number of visits to the exhibition.

Sampling: Surveys

Alternatively, an exit survey could be undertaken with a sample of visitors to the museum, again ensuring that the surveying is done at different times of the day etc where respondents are asked on exiting the museum if they attended the exhibition. The proportion of visitors who had visited the touring exhibition can then be multiplied by the total number of visits to the museum over the duration of the exhibition to give the total number of touring exhibition visits. If this type of survey is undertaken, an additional question on the ages of the respondents and their party would give a breakdown of adult and child visits to the exhibition.

If the exhibition is staged at a 'non-traditional' venue these approaches could also be adopted although the survey approach would require the number of 'visits' to the venue to be a known quantity.

If data for participation in outreach events cannot be recorded robustly and accurately, data on these events should not be submitted.

Template 4:

Number of instances of teachers in contact with museums

Measure

Measure	Ref
Number of instances of teachers in contact with museums, excluding visits with school parties	4.1

Definitions

Instance is used here to acknowledge the difference between a teacher and his/her contacts with the museum. The measure asks for the number of instances of teachers coming into contact with museums, as distinct from the number of teachers who are in contact with museums. An individual teacher may come into contact with the museum several times over the course of a year.

Contacts with teachers visiting museums with their pupils are excluded from this template, as are contacts with teachers engaged in outreach with their pupils.

Specific Definitions

This measure is intended to measure to the number of instances of **FACE-TO-FACE** contact between a teacher and museums, through activities specifically organised for teachers. In order to align Renaissance data with that for Strategic Commissioning and the Schools Participation database, contacts are defined as:

- Participation in INSET training in the museum or elsewhere
- Teachers on secondments
- Teachers on work placements
- Teachers attending previews
- Museum staff meeting with teachers, inside or outside museums, to develop teaching resources that will be used in the classroom or at the museum.

This Template should not include teachers on 'solo' pre or post visits to museums where they do not meet with museum staff. Neither should it include meetings that only discuss the logistics or practicalities of visiting.

For the purposes of this template, the following should also be regarded as **'teachers'**:

- Students on PGCE and Initial Teacher Training (ITT) courses
- Undergraduates and Foundation course students undertaking teaching placements
- FE and HE lecturers at colleges or universities
- LEA advisers
- Teaching assistants

Illustrative Questions and Answers

16. Counting teachers accompanying school groups

Should teachers, (and parents) accompanying school groups only be counted as 'ordinary' adult visits?

Response

Yes – teachers, teaching assistants or parents accompanying a school visit should only be recorded under Template **6.1** (Total Visits).

17. Teachers on pre-visits

Why are contacts made with teachers on pre-visits to the museum not included in the count for this template?

Response

When the templates were revised in March 2006, teachers on pre-visits to a museum were excluded from the count, as only ticketed venues were able to monitor and record this activity. At free venues, the teachers didn't have to declare themselves to museum staff and therefore couldn't be reliably and consistently counted. If however, as part of a pre-visit a teacher meets with a member of museum staff to discuss the structure and content of their planned visit then this **can be counted** as an instance of contact.

18. Nature of contact – face-to-face, telephone, e-mail

Does this template only include face-to-face contact and not telephone calls, e-mails and letters?

Response

Yes, this template only measures face-to-face meetings between teachers and museum staff to discuss the structure and content of a school visit and develop teaching resources. Telephone calls, e-mails etc must not be included.

Data Collection Methods

It is expected that the museum's Education Officer(s) will keep a diary of individual contacts with teachers and that these contacts are recorded electronically on a database or spreadsheet. If bookings are taken for events organised for teachers, it is expected that these will be checked against a head count of arrivals wherever possible.

Template 5:

Number of instances of children, young people and adults participating in organised activities at museums

Measures

Measure	Ref
Number of instances of children under 5 participating in organised activities at museums, but not visiting with their school	5.1
Number of instances of children (aged 5 to under 16) participating in organised activities at museums, but not visiting with their school	5.2
Number of instances of adults (aged 16 and over) participating in organised activities at museums	5.3

Definitions

Instance is used to acknowledge the distinction between **participants** and **participation**.

Organised activities refer to mediated activities, such as talks, lectures, workshops, courses, guided tours etc led by museum staff, volunteers or freelancers employed by the museum. It does not include activities such as quizzes, trails, dressing-up, trips on steam trains etc if the museum staff's only involvement is in handing out packs, badges, costumes or driving a train etc.

Specific Definitions

Measures **5.1** and **5.2** should include number of instances of children participating in organised holiday activities, homework and out of school clubs, Brownies, etc. facilitated by a member of museum staff (including volunteers or freelance artists etc.). If groups are of mixed-age, please make a pragmatic decision about the majority age – if the majority i.e. more than half are aged under 5 all instances of participation should be included under measure **5.1**. If the majority of a group are primarily 16 and over, the instance of participation should be counted under measure **5.3**.

If 16-year olds participate in organised activities designed primarily for school-age children they should be regarded as 'children' in this instance and their participation recorded under measure **5.2**.

Measure **5.3** includes adult participation in family events if the events are designed for adult as well as child participation and not primarily for one or the other. For example, in the context of an activity aimed at toddlers, parents will inevitably be active participants

but, as the activity is primarily about the experience of the toddlers, the adult participations would NOT be counted under template measure **5.3** (they would just be captured under **6.1**) However, in the case of a “parent and toddler” group, which made use of a crèche so that the mothers could pursue a learning opportunity directed at adults, the mothers could be counted under Template measure **5.3**.

Illustrative Questions and Answers

19. Participation by organised groups

How should visits by young people in organised groups or clubs e.g. Brownies, Young Archaeologists, which are often pre-booked, be counted?

Response

If they participate in organised activities facilitated by a member of museum staff they can be counted under Template **5.1** or **5.2**. If they don't participate in organised activities they should only be counted under Templates **6.1** (Total Visits) and **6.2** (Under 16 Visits). The name of the group should also be recorded as it should be reported on in Template **3.10**.

20. Drop-in activities

Can participation by adults or children in drop-in activities be counted under Template **5**?

Response

Yes, participation in drop-in activities can be counted under Template **5** if the activity is led or moderated by a member of museum staff.

21. Museum demonstrators

If a member of staff e.g. museum interpreter demonstrates an interactive exhibit to a child or an adult, does this count as participation in organised activity?

Response

No, demonstrations by museum interpreters should not be counted as organised activity even if there is interaction between the visitor and the demonstrator about the collections or displays. Organised activities included in this template are pre-planned and do not include ad hoc or spontaneous engagement between visitors and museum demonstrators/interpreters/animateurs.

22. Enquires to library staff

If a museum's library is part of the collection can instances of library staff accessing and explaining about the reference material that they have sourced for readers be included as an organised activity under Template **5.3**?

Response

Organised activities are defined as specifically mediated activity, such as gallery talks, lectures, courses, guided tours etc. This measure also includes adult participation in family events. Retrieving items from stores and explaining about the archival and library resources is regarded as a **service** rather than an 'organised activity'.

23. Activities related to corporate hire

If attendees at a corporate hire event receive a talk or a tour as part of the hire, can this activity be counted as participation in on-site activity at the museum? Corporate hire visits themselves cannot be included in the Total Visits count in Template **6.1**.

Response

As corporate hire visits are excluded from the Total Visits count in Template **6.1** it would be anomalous to include any activities involving visitors at corporate hire events, so no.

24. Object Identification Service

Can instances of museum staff providing an object identification service to a member of the public be counted as 'organised activity'?

Response

This guidance defines 'organised activities' as specifically mediated activity, such as talks, lectures, courses, guided tours. Museum object identification services are not regarded as 'organised activity'.

25. Participation in multiple organised activities on the same day

If a museum visitor participates in more than one organised activity during the same day how should this be recorded?

Response

If each instance of participation is in a separate organised activity e.g. workshop and then a guided tour, this should be counted as two instances of participation.

26. Adult participation in family events

If adults participate in 'Family Events' should this be recorded under Template **5.3** (Adults participating in organised activity)?

Response

Yes, if the family events have been designed for both adults and children then the adults' participation should be recorded under Template **5.3**.

27. Guided tours

If visitors are only able to visit a site under a guided tour e.g. at sites where visits are restricted because of building work etc, and cannot view the collection on their own, is this regarded as an 'organised activity'?

Response

Yes, participation in these guided tours should be recorded as organised activity. These visits should also be reported under Template **6.1** and **6.2** as appropriate.

Data Collection Methods

The numbers of children and/or adults participating in organised activities should be recorded on electronic booking systems or on paper booking forms (and subsequently recorded electronically) by the Education Officer(s) or museum staff concerned.

If participants have pre-booked for organised events, it is expected that these bookings will be checked against a head count of participants wherever possible. The data filed should describe the **actual** number of children or adults participating in an event (s), not the number booked.

At events for children that are suitable for mixed age groups e.g. Under 5s and 5 to Under 16, the age of the child participating could be established at the point of booking.

Where events are **not pre-booked**, museums may adopt one of the following approaches, depending on the type of event:

Talks, lectures, workshops: Manual head-count or clicker-count of attendance at start of event, conducted either by event facilitator or other member(s) of museum staff in attendance.

Where it is not possible on the basis of the scale of activity or time to undertake a count (or census) of the number of instances of participation, **sampling** methods can be employed to estimate the number of instances of participation.

Sampling Methods: Headcounts

If drop-in events are scheduled throughout the day and have a fixed duration e.g. 30-minutes then over the course of an 8-hour day there could be a maximum of 16-sessions. If it is not possible to measure attendance at every session, a headcount could be taken at a sample of these sessions e.g. at the first and last sessions and at a manageable number during the day. The average attendance at these sessions is then multiplied by the total number of sessions to give the total number of instances of participation.

Sampling Methods: Surveys

If it not possible to count all the instances of participation in events during the course of the day, a proportion of attenders could be sampled to provide an estimate of the number of instances of participation. This is dependent on the total number attenders at the museum or event being known.

'Surveys' could be conducted randomly by members of museum staff or volunteers (approach every 3rd or 5th person exiting) and at the most basic level could simply ask at the point of exit "Did you attend an event at the museum today, and if so, how many?" If a number of activities were staged in one day, some of which were facilitated and some that weren't, the respondent could be given a **show-card** listing the facilitated activities. This question should be repeated to a manageable percentage of people leaving the museum at different times throughout the day.

By asking this question, the proportion of visitors participating in events can be calculated. When multiplied by the total number of visitors to the museum on that day this will give the total number of people participating in one or more events.

Multiplying the number of people by the average number of instances of participation per person will give the total number of instances of participation.

Sample Size

In undertaking surveys, the question is often asked about what is an adequate sample size to ensure that the results are statistically robust. This depends on a number of factors including the acceptable confidence level, margin of error and the estimated percentage result. Most research studies adopt a confidence level of 95% and a margin of error of 5% is accepted as reasonable. The final factor that determines the sample size is the percentage result. For example, if it is predicted that 50% of attenders will have participated in an event this is the 'worst case' split and would require a larger sample size (384 in table below) than if say it was estimated that 20% of attenders had participated in an event (246 in table below).

The table below shows the sample sizes required at 95% confidence level and a margin of error of 5% for a range of percentage results from 5% to 95%.

Sample Sizes at 95% Confidence Interval and 5% Margin of Error

Percentage Results	No of Responses
50%	384
45% or 55%	380
40% or 60%	369
35% or 65%	350
30% or 70%	323
25% or 75%	288
20% or 80%	246
15% or 85%	196
10% or 90%	138
5% or 95%	73

Estimating numbers of attenders at an event

If it is impractical to count all the attenders at a large event, a proportion of the attenders could be sampled. The basic assumption behind this estimation method is that an accurate 'hard count' of people who complete an event-related action is available. Definable actions could include the number of people who bought a drink or snack, the number of people who pick up a map, or the number of people who attend a particular activity, such as a talk.

The second piece of information required is acquired by sampling a proportion of attenders as they exit the event. A question relating back to the definable action must be asked e.g. if the total number of events attended was a definable action, the question would be "Did you attend a talk, and if so, how many?" This question should be repeated to a manageable percentage of people leaving the event.

By asking this question, the average number of times that a person did some action while at that event can be calculated. The number of people attending the event can then be estimated by taking the 'hard count' of those attending a talk (X) and dividing it by the average number of talks per person estimated by the exit sample (Y). If a person didn't attend a talk they should still be included in calculating the average, with an entry of '0'.

Total number of attenders = Total attendance at talks (X) ÷ Average number of talks attended (Y)

If data for on-site participation in organised events cannot be recorded robustly and accurately, data on these events should not be submitted.

Template 6:

Visits, Child Visits and Web Visits

Measures

Measure	Ref
Total number of all visits to museums	6.1
Number of visits by children Under 16 to museums	6.2
Number of website visits	6.3
Number of loan venues in England (annual)	6.4
Number of loan venues in Wales, Scotland and Northern Ireland (annual)	6.5
Number of loan venues overseas (optional; annual)	6.6

Definitions

Children are defined as being aged Under 16. In the context of a school visit by Year 11 groups, all the pupils should be regarded as being aged Under 16. **Adult** visitors are defined as being aged 16 or over.

The definitions used here in relation to **website visits** are those approved by ABCE. Although it is website visits (as defined below) that we wish to capture additional definitions of other terms have been included to help clarify precisely what should be counted.

A **website visit** (sometimes known as a **user session**) is a series of one or more **Page Impressions**, served to one **User**, which ends when there is a gap of 30 minutes or more between successive **Page Impressions** for that **User**.

A **visit** is effectively a near-continuous burst of activity by a valid **User**. A **Visit** is determined when a **unique user** enters or re-enters a **website** during a specified period. A **visit** is determined by counting bursts of activity (**Page Impressions**) made by valid **unique users** that have not re-entered the site within the past 30 minutes. Visits from **spiders** and **robots** should be excluded from this measure. **Visits** are a 'better' indicator of total site activity than **unique users** since they indicate frequency of use.

Unique User is a unique and valid identifier. Sites may use:

- IP + User-Agent
- Cookie and/or
- Registration ID

Where a **Unique User** is calculated by IP + User-Agent, this definition may overstate or understate the real number of individual **users**.

A **Unique User** is, at a minimum, a unique combination of an IP address + the Browser ID and Operating System entering a website by any valid page and is counted once for the given period (the minimum audit period is one calendar month). The number of **unique users** is an indicator of the site's audience or reach.

Also known as Page View, a **Page Impression** is a file, or combination of files, sent to a valid **User** as a result of that User's request being received by the server. In effect, one request by a valid **User** should result in one **Page Impression** being claimed. In most cases, a single request from a User causes the server to send several files to satisfy the request. For example, the server may send an HTML file followed by several associated graphics images and audio files.

A **robot** is a program that automatically visits websites and reads their pages and other information in order to create entries for an index. The major search engines on the Web all have such a program, which is also known as a **crawler**, a **robot** or a **bot**.

Robots and **spiders** are typically programmed to automatically visit sites that have been submitted by their owners as new or updated. Entire sites or specific pages can be selectively visited and indexed. Spiders are called spiders because they usually visit many sites in parallel at the same time, their "legs" spanning a large area of the "web". ABC Electronic stipulate say that traffic in a site's access logs visited by such programs is not a valid measurement of human activity, and as such should be excluded.

A **loan venue** is defined as any approved borrowing institution, organisation or exhibition facility (or individual researcher). In the event that a loan has been made to an individual (e.g. a researcher) that individual will be counted as a venue.

Specific Definitions

Template **6.1** measures all visits to the museum. **Visits** are the actual physical count of the total number of all visits made to the museum. A visit refers to a single trip to the museum by an individual, and a period of time in which they physically access the collections.

Template **6.1** includes all 'ordinary visits' (those not involving the education programme) to the museum **plus** the formal education programme visits measured in Templates 1 and 2.

Visits that should be **excluded** from Template **6.1** are those by staff, volunteers, contractors, suppliers and corporate-hire customers. This measure should also **exclude** virtual visits, visits to touring exhibitions at other venues and instances of participation in off-site programmes.

Template **6.2** measures all visits to the museum by those aged Under 16 that are (formal) educational programme visits **plus** all 'ordinary visits' i.e. those not involving the education programme.

Template **6.2** should be the sum total of Templates **1.1 to 1.13, 1.16, 1.18**; Templates **2.1 to 2.13, 2.16, 2.18, plus** the number of ordinary visits to the museum by Under 16s.

For charging museums, ticket sales should provide an accurate count of visits. Visitors offered free entry to cafés or shops should also be accounted for, as should educational visits not captured by ticketing systems. For non-charging museums, the accuracy of the figures should be indicated clearly by an estimate of the probability range within which attendance is likely to fall. [Help and guidance on this will be included in the final Guidelines]

The figures reported in Template measures **6.4, 6.5 and 6.6** should include the number of venues to which loans are in place at the beginning of the year as well as the number of venues to which new loans have been made during the year. It is calculated as follows:
Numbers of venues to which loans are in place at the start of the financial year e.g. 2008-09 **plus** numbers of venues to which new loans have been made during the financial year 2008-09 = total

The take-up of outreach collections is not to be included in measures **6.4, 6.5 or 6.6**.

Venues in the Isle of Man or the Channel Islands should be regarded as **overseas** loan venues as these islands are not part of the United Kingdom.

Data for annual submissions should be included at the end of each financial year i.e. as part of the 4th quarter submission.

Illustrative Questions and Answers

28. Visits to shops and cafes

If visits to shops, cafes etc are counted separately from visits to the museum, should these shop and café visits be added on to the museum visits to give a total number of visits?

Response

If visits to shops, cafes etc are counted separately from visits to the museum, they **should not** be added on to the museum visits to give a total number of visits. At sites where the shop, café etc lie beyond the beam counter, turnstile, clickers etc, there is no requirement for museums to measure the number of visits that are only made to the café or shop.

29. Corporate hire visits

Can corporate hire visits be included in the total number of visits?

Response

No - corporate hire visits should be excluded from Template **6.1**.

30. Ordinary child visits

Is there a requirement to measure ordinary child visits by country of origin?

Response

No – ordinary child visits do not need to be measured by country of origin. The only templates where a child's origin needs to be recorded are Templates 1 and 2, to distinguish between visits made by pupils at schools in England and those made by pupils at school elsewhere in the UK or overseas.

31. Inclusion of child on-site activity in Under 16 visits

Under Template **6.2** (Visits by Under 16s) should the total for Template **5.1 and 5.2** (Number of instances of children (Under 5s and 5 to Under 16s) participating in organised activities at museums, but not visiting with their school) be subtracted from the total number of Under 16 visits to prevent double counting?

Response

No – the total for Template **5.1** and **5.2** is assumed to be a sub-set of the total number of Under 16 visits.

32. Visits to exhibition previews

Under which template should visits to exhibition previews be counted?

Response

Visits to exhibition previews should be counted under Template **6.1**.

33. Inter-departmental loans

Can a short-term loan to a lecturer be counted under Template 6.4? Can inter-departmental loans e.g. to different university departments be included in Template 6.4?

Response

Loans to individual external researchers can be counted under Template measures 6.4. However, in the case of University Museums, inter-departmental loans and loans to lecturers at the same university should NOT be included.

34. Corporate loans

Can corporate loans be included in this count?

Response

Corporate loans are excluded from the count for Template 6.4, as in the majority of cases, public access to such loans is not guaranteed and neither are they made for research purposes.

35. How long does a loan have to be?

For what length of time does an object have to be 'loaned' to qualify as a loan? Does it have to be overnight as a minimum?

Response

If the object leaves the care of the museum that holds it (e.g. the object is not simply being chaperoned by a curator while it is x-rayed for example), and if the museum sees fit to fill out an Exit record (or that museum's equivalent paper work) then, regardless of the amount of time involved, it may be counted as a loan.

36. Loan box objects

Why are objects in loan boxes not included as loans?

Response

Objects in loan boxes are not loaned for the same purpose as the loans that measures 6.4 - 6.6 seek to record (i.e. loans for exhibitions; for collections research; or because they make more “sense” in the context of another museum’s collection). Accompanied loan boxes are considered to be part of a museum’s outreach activities and are covered by Template 3 (see above).

Data Collection Methods

‘Ordinary’ visits to a museum can be counted in various ways:

- Box office tickets for charging venues (which should include receipts for free admissions)
- Electronic counting by a magic eye
- Manual counting with a clicker
- Sampled head counts

At charging venues where under 5s are entitled to free admission, the number of under 5s could be logged at the point of sale to give a total number of under 16 visits.

For ‘Family’ tickets the numbers of adults and children visiting should be logged at point of sale, not calculated using a multiplier e.g. a ‘Family’ ticket represents 2 adults and 2 children.

Counting Visits by Under 16s

While the number of those participating in education programmes at the museums will have been counted (Templates 1 and 2), it may be difficult for museums to count the number of other visits by children (aged under 16) because magic eyes do not distinguish between adults and children.

In venues where children’s visits are recorded using a clicker or other manual count this figure should be added to the number for those aged under 16 participating in the education programme to give the total number of visits by children for Template **6.2**.

At venues where visits between adults and children cannot be differentiated, the most obvious way to estimate this is by extrapolating from the percentage of children visiting the museum taken from visitor surveys. The results of the MLA exit surveys carried out by

BDRC can be used for this purpose, as the survey is carried out on a rolling basis and representative of admissions across the year.

Estimating the percentage of children visiting however does not require a full survey, it could be done on the basis of one or two questions e.g. are you visiting with children aged under 16? How many in your party are adults? How many in your party are aged under 16?

The important factors are ensuring that:

- Surveys are conducted randomly i.e. every 3rd or 5th visitor is approached
- Surveys are representative of visitor flow (conducted at weekdays and weekends, holiday and non-holiday periods)
- Sample sizes are adequate to ensure that results are statistically robust

If percentages are used the calculation for child (under 16) visits should be done as follows:

Stage 1: Total for all visits (Template 6(i)) – Total for educational programme (Template 1 + Template 2) = 'Ordinary visits'

Stage 2: Ordinary visits x percentage of children visiting = Total number of 'ordinary' visits by children

Stage 3: Total number of ordinary visits by children + Total for educational programme for Pre-5 to Year 11 = Total visits by children aged under 16

Web Statistics

It is anticipated that web statistics are counted through a quantitative web site auditing software tool, if possible, software that has been accredited by ABCE Electronic e.g. Google Analytics.

Samples, Sampling, Confidence Intervals, Confidence Levels and Sample Size

Samples

A research sample is defined as ‘the people you want to consult’ this might be your visitors, users of a specific service or participants in your outreach activities.

The whole of these constituencies represent the **population** from which your **sample** may be taken. For a museum, the population can be taken as **all** visitors to the venue within a fixed period of time, say 12 months.

It is unusual to conduct research with everyone in the population (a census) unless the defined group is very small.

Most research data is taken from a sample – that is a **part** or proportion of the population. Its purpose is to enable investigation of the characteristics of the population (museum visitors) in a more manageable way in terms of resources and time. A sample must therefore be **representative** of the whole.

Sampling

Any visitor surveys or headcount sampling that a museum undertakes should be representative of its audience. To ensure this, any interviews or sampling procedures e.g. headcounts should be conducted at different times of day and different days of the week, to reflect the visitor flow/footfall at the museum e.g. if 60% of visits are made on Saturday and Sunday, then 60% of the surveys should also be carried out on Saturdays and Sundays.

A sampling structure based on a museum’s visit figures for research amongst visitors is a detailed below.

The table shows the visit figures for an art gallery. The gallery is open from April to September, thus the time-scale for interviews should span this six-month period. The gallery is usually closed on Mondays (except for May and August Bank Holiday Mondays) and Tuesdays. Interviews or headcounts should therefore be completed across the five days from Wednesday to Sunday, although a proportion should be done on at least one of the Bank Holiday Mondays.

STEP 1

Calculate the proportion of visits to the gallery during each day of the week, as a percentage of the total number of visits at the gallery from April to September

Total number of visit to gallery = 30,417

Day	No of visits	% of total visits
Monday	1,983	6.5
Wednesday	4,330	14.2
Thursday	4,759	15.6
Friday	3,915	12.9
Saturday	6,931	22.8
Sunday	8,499	27.9
TOTAL	30,417	100%

Calculate the proportion of visits to the gallery during each month, as a percentage of the total number of visits at the gallery from April to September

Month	No of visits	% of total visits
April	2,035	6.7
May	5,968	19.6
June	5,694	18.7
July	4,205	13.9
August	7,966	26.2
September	4,459	15.0
TOTAL	30,417	100%

Total number of visitors to gallery = 30,417

STEP 2

Calculate the number of surveys or that must be completed during each month and on each day of the week, to ensure that the sample survey is **representative** of the visiting population.

This calculation could be taken one step further to work out the proportion of visitors who attend the gallery on Wednesdays in May. As with sample size, implications of cost and staff resources should be considered in setting manageable and achievable quotas for sampling.

The statistical reliability or **confidence interval** is the plus-or-minus figure often seen reported in newspaper or television opinion poll results. For example, if you have a confidence interval of 4, and 47% percent of a sample picks an answer, you can be 'sure' that if the question had been asked of the entire population (all museum visitors) then between 43% (47% - 4%) and 51% (47% + 4%) would have picked that answer.

The **confidence level** indicates how sure you can be that an answer from a sample survey, with its associated confidence intervals, would represent the actual results if all museum visitors had been surveyed. It is expressed as a percentage and represents how

often the true percentage of the population (all museum visitors) lies within the confidence interval. Most researchers use a 95% confidence level, which means you can be 95% certain.

Confidence levels have a related 'z' number or value. The value of 'z' is 2.58 for 99% confidence, 1.96 for 95% confidence, 1.64 for 90% confidence and 1.28 for 80% confidence.

The larger a **sample size**, the more sure you can be that survey responses truly reflect the entire museum visitor population - for a given **confidence level**, the larger the sample size, the smaller the confidence interval. However, the relationship is not linear i.e. doubling the sample size does not halve the confidence interval.

The accuracy of survey results also depends on the percentage of a sample that chooses a particular answer. If 99% of your sample said 'Yes' and 1% said 'No' the chances of error are remote, irrespective of sample size. However, if the percentages are 51% and 49% the chances of error are much greater. It is easier to be sure of extreme answers than of middle-of-the-road ones. When determining the sample size needed for a given level of accuracy, the worst-case percentage (50%) should be used.

Examples of the confidence intervals relating to different sample sizes and different levels of response e.g. 10% or 50% are shown in the table below:

Sample Size	95% Confidence Level		
	10% or 90% +/-	30% or 70% +/-	50% +/-
100	6	9	10
150	5	7	8
200	4	6	7
250	3	6	6
300	3	5	6
400	3	4	5

Sample Size

When undertaking a sampling exercise, a commonly asked question is 'How many people should I sample?' There is no single or right answer to this question. Generally, the larger the sample size, the more closely your sample data will match that from the population (all visits to the museum). However it is possible to work out how many responses will give you sufficient precision at an affordable cost.

Calculation of the optimum sample size depends upon a number of factors unique to each survey. The three most important are:

- How accurate you wish to be
- How confident you are in the results
- What budget you have available

An increase in either accuracy or confidence (or both) will always require a larger sample and higher budget. Therefore a compromise must be reached based on an acceptable degree of inaccuracy and confidence.

If you anticipate splitting the overall sample into different groups e.g. analysing the responses of female visitors, or older visitors you will need to consider increasing the sample to allow you to produce statistically reliable sub-sets of data.

Calculating Sample Size

The formula for calculating the sample size required for estimating, for example, the percentage of visits made to the museum by children is as follows:

$$s = \frac{z^2(p(1-p))}{e^2}$$

where:

s = sample size

z = number relating to the degree of confidence you wish to have in the result

p = an estimate of the proportion of people falling into the group in which you are interested in the population

e = the proportion of error we are prepared to accept

As an example, if we are attempting to assess the percentage of visits made to the museum by children, if we assume that we wish to be 99% confident of the result therefore. $z = 2.85$ and that we will allow for errors in the region of $\pm 3\%$ therefore $e = 0.03$. In terms of an estimate of the proportion of visits that are made by children, if a previous survey had been carried out, we could use the percentage from that survey as an estimate. However, if this were the first survey, we would assume that 50% (i.e. $p = 0.5$) of 50% of visits would be accounted for by children and 50% by adults.

Choosing 50% will provide the most conservative estimate of sample size. If the true percentage were 25%, you would still have an accurate estimate; you will simply have sampled more people than was absolutely necessary. The reverse situation, not having enough data to make reliable estimates, is much less desirable.

In the example:

$$s = \frac{2.58^2(0.5*0.5)}{\sqrt{(0.03)^2}}$$

Therefore s = 1,849

There are a number of 'online calculators' that can be used to determine the appropriate sample size for a study. One such can be found at

<http://www.surveysystem.com/sscalc.htm>

In these cases the user can select the required confidence level (95% or 99%), confidence interval (+/- percentage) and the population e.g. estimated total number of visits for a quarter and the sample size required will be calculated.

Appendix 1

Summary of Main Changes to Data Collection Templates

The changes to the Data Collection Templates for 2008-09 come under five broad categories:

1. Structural changes
2. Generic changes in definitions
3. Specific changes in definitions
4. Introduction of new template measures
5. Removal of old template measures

Structural Changes

The templates for 2007-08 were structured as follows:

2007-08 Structure

Number of visits by children/young people in formal education (Templates 1 & 2)

On-site participation by, and outreach contacts with, children (Template 3)

Contacts with teachers (Template 4)

On-site participation by, and outreach contacts with, adults (Template 5)

DCMS measures (Template 6)

Here, the main distinction is in terms of whether the on-site participation or outreach is with children or adults. In the new templates for 2008-09, the distinction is based on the area of activity as follows:

2008-09 Structure

Number of visits by children/young people in formal education (Templates 1 & 2)

Outreach activity with children and adults (Template 3)

Contacts with teachers (Template 4)

On-site participation by children and adults (Template 5)

Visits, child visits and web visits (Template 6)

Generic changes in definitions

Children

In order to align the Data Collection measures with those collected by DCMS, the definition of a child has been changed from 0-16 to Under 16. This will also align MLA data with the Taking Part survey definition of children and adults.

Whilst this change in definition will have implications for the continuity of the data for this measure, it is estimated that this impact will not be significant and is outweighed by

the benefits to MLA of aligning its definition with DCMS and Taking Part. It is estimated that the impact of this change will not be significant for the following reasons:

1. The measure of child visits is the sum total of self-directed and facilitated visits made by pupils from Early Years (Pre-5 and Reception) to Year 11 from schools in England, elsewhere in the UK and Overseas, **plus** the number of ordinary visits by those aged Under 16.

As it is proposed that pupils in Year 11 who may be aged 16 when they visit still be regarded as Under 16 i.e. of compulsory school age, the change in definition will have no impact on the number of Under 16 school visits.

2. Ordinary visits are the second component of child visits. As some venues are unable to record this count reliably, they only report on their school visits in Template **6.2**, therefore the change in definition will have no impact on the number of visits by Under 16s at these venues. At venues that are able to report on ordinary child visits (measured either through tickets, clickers or visitor surveys etc) the loss of one year's age cohort is unlikely to have a significant impact as the percentage of ordinary child visits accounted for by 16-year olds alone is estimated to be less than 5%. Consequently, the impact on child visits, which also includes school visits, is likely to be relatively small.

This change will also impact on non-school outreach, participation in on-site activity and attendance at touring exhibitions. In each case, it is estimated that the extent of contact or participation specifically with 16-year olds will not impact significantly on the final counts.

Specific changes in definitions

See Guidelines for details of specific changes.

New template measures

MLA introduced the following template measures into the Data Collection Templates in 2008-09:

- Number of self-directed visits to museums by HE students in England (Template **1.20**), UK (Template **1.21**) and overseas (Template **1.22**)
- Number of facilitated visits to museums by HE students (Template **2.20**), UK (Template **2.21**) and overseas (Template **2.22**)
- Number of instances of school age children (aged 5 to under 16) participating in museums' targeted and tailored outreach activities NOT organised by their school (Template **3.4**)

- Number of instances of adults (aged 16 and over) participating in all museums' targeted and tailored outreach activities (Template **3.5**)
- Number of instances of school age children (aged 5 to under 16) participating in museums' self-selecting outreach activities NOT organised by their school (Template **3.6**)
- Number of instances of adults (aged 16 and over) participating in all museums' self-selecting outreach activities (Template **3.7**)
- Number of children's and young people's groups participating in Hub museum activities on and off site (Template **3.10**)
- Number of instances of children under 5 participating in organised activities at Hub museums but not visiting with their school (Template **5.1**)