

PREPARING VOLUNTEERS TO ASSIST IN AUDIENCE STUDIES

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Using dedicated volunteers for conducting audience studies can be profitable if the volunteers are carefully trained and understand that they are a critical segment of a research team. Through the training, volunteers learn to deal with potential respondents in a carefully-prescribed manner. Also, it is emphasized that they be hospitable and gracious to the public, dependable in keeping their commitments, and mum about the data they gather.

Background

At the Holden Arboretum, Mentor, Ohio, volunteers attended two-day training sessions to prepare them to carry out visitor research in four seasons of 1987. To be sure all were adequately prepared, the research director provided a manual of guidelines to procedures, "stock answers" to frequently-asked questions, and instructions on selecting a systematic random sample.

Such training is designed both to provide information about the overall research plan and to instill confidence for carrying out the procedures according to specific instructions. Since volunteers are expected to adhere to the well-defined, comprehensive plan, the possibility of their injecting bias is minimized.

Another aim of the training is to make the data gathering experience enjoyable for both volunteers and respondents. Since audience research is a legitimate pursuit for a museum, volunteers are instructed never to ask permission or to apologize when they approach a potential respondent. Instead, they present the invitation to answer the questionnaire as an opportunity to participate: the respondents are special people, selected to offer their input on museum programs, their participation preferences, and their lifestyle characteristics (psychographics and demographics).

If a potential respondent appears reluctant, the volunteer can rely on prepared answers to the 12 most-frequently-asked questions or comments. Being familiar with these "stock answers" avoids floundering and undergirds the volunteer's confidence. However, they never pressure truly negative people or those who have deadlines to meet. When approached in a positive way, few visitors decline; many gladly welcome the invitation.

Training

At the training sessions, volunteers are helped to understand the overall dimensions of the audience study

as the research director explains the key factors defining all types of museums (volunteers rarely think beyond their own institution), the known characteristics of museum audiences, how the current study builds on and relates to existing data, and the importance to their museum of obtaining valid, reliable survey results.

We go over the questionnaire item by item, noting the phrasing of questions, their order, the layout design, and the varied methods of response (rating on a Likert-scale, semantic differential, before-and-after-visit checkoff lists, ranking, writing in short answers). So that they understand how each part of the form works, each person then fills in a questionnaire.

Next we go over the guidelines, stock answers, and sampling instructions. We examine the notebook in which to register the questionnaires by number, and the other supplies (see Kate Harting's checklist). We move to a site where sampling will be done, to discuss the structure of the data gathering plan -- schedule, location of sites, how to approach a visitor. Here we demonstrate how to select the systematic random sample and we role play a situation in which the respondent is reluctant. All these steps help allay apprehension and curb misinterpretation or overenthusiasm that could prejudice the process.

At the end of the first day of training before the initial round of data gathering, each volunteer takes home a questionnaire for a family member or friend to fill in. The volunteer times the response period and queries this respondent on any problems in clarity or wording. These questionnaires, which are returned at the second training day, can constitute the pretest. Modifications in the instrument are made after discussion the second day, and before the final form is printed.

A major portion of the second training day is spent in learning to code the questionnaires for computer data entry. Coding sheets prepared by the research director are distributed, and volunteers take them home for additional review. At the session, each volunteer codes at least her/his own form. Complete familiarity with the coding system and precision are stressed.

On the Job

Each time a volunteer serves, s/he reviews the guidelines, stock answers, and sampling plan to ensure that every person handles each step in the process in the same manner. If s/he is coding during slack moments, the coding sheets are also reviewed. The on-site supervisor checks each day that records are kept accurately and questionnaires are being completely filled in. If respondents seem to have difficulty in following directions or the volunteer has procedural or coding questions, she immediately discusses these aspects with the volunteer.

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The most important step in the data gathering process is that the research director anticipate all the questions and needs of the volunteers and the respondents before any training takes place. Then, the actual data gathering proceeds almost automatically. However, if the volunteers sense that the director hasn't planned for all eventualities, they will have little reason to prepare themselves to do the job precisely, graciously, and with commitment.

After having prepared volunteers to carry out this and other data gathering assignments, some of which involved more extensive, rigorous training for personal or phone interviews, this research director can confirm that dedicated, personable volunteers can carry out an audience study very satisfactorily when they have been well trained and they follow instructions carefully.

References

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CHECKLIST FOR ON-SITE AUDIENCE SURVEYS

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In preparing for our four-season audience survey in 1987 at the Holden Arboretum, Mentor, Ohio, we developed a checklist that may help other museums in making plans for on-site visitor studies.

In the two months prior to start of survey:

- List all survey dates and hours scheduled for the entire survey period (in Holden's case, several weeks in each of the four seasons).
- Develop list of potential volunteers and decide on minimum number needed to cover all scheduled days and hours.
- Send letter, containing brief explanation of audience survey and expectations of the volunteers in terms of time and duties. List survey dates and request volunteers to note their availability for these dates (this is not yet a sign up for the dates). Identify dates for the training sessions, to be held one week prior to the first survey session, for two days on-site.

- Follow up with phone calls to volunteers who do not respond. Try to get a core group of 25 or so for the initial training sessions.

- Call volunteers to actually schedule days and hours for the first season; try to randomize their participation by day and time slot. Follow up with reminder postcards one week prior to their scheduled service.

- Hold the two-day training sessions (see Dr. Hood's accompanying article).

One month before start of subsequent survey seasons:

- Continue recruiting and training new volunteers before each season; training may need to be on individual rather than group basis.

- Mail out new availability sheets with schedule of survey dates and hours; follow up with phone calls to obtain signups, again aiming to randomize assignment by day and time slot.

During the survey period:

- Schedule one volunteer on weekdays for each time slot (i.e., 10 a.m. - 1:30 p.m., 1:30 p.m. - 5 p.m.), unless a large group is expected, when more volunteers are needed. On weekends schedule two persons for each time period. On busy weekends and special events, recruit at least three volunteers for each period.

- When more than one volunteer is scheduled for a time period, space out the locations of survey sites to get maximum coverage of visitors: near exits inside visitor center, just outside or near visitor center, and remote location such as parking lot or picnic area. It is a good idea to assign outdoor locations to teams such as married couples.

Requisite Supplies at Each Station:

- Tables -- at least six feet of work space; located so volunteers can view exits to sample visitors as they leave building or groups;

- Four to six chairs at each table, for volunteers, respondents, their companions;

- Survey instruments, pencils or pens;

- Sign to identify the project

- Badges for volunteers to identify project

- Notepad to list reasons for refusals

- Notepad to list addresses of members not receiving timely mailings, or other non-survey comments.

- Notepad to record survey numbers, dates, times, and volunteers for designated days

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