LEARNING FROM THE EVALUATION OF TATE EXCHANGE YEAR ONE
# EXPERIMENTS IN PRACTICE:
LEARNING FROM THE EVALUATION OF TATE EXCHANGE YEAR ONE

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JANE STEELE  
DIRECTOR, EVIDENCE AND LEARNING,  
PAUL HAMLYN FOUNDATION

As an organisation, Paul Hamlyn Foundation (PHF) is committed to gathering evidence, learning from it and making changes on the basis of what we have learnt. We believe this works best as a collective effort so we share our findings and support our grantees to collect and use evidence, test new approaches and evaluate and improve their ways of working.

Tate is one of very many organisations known to PHF that do the sort of fascinating and complex work that brings particular evaluation challenges. Their work is often experimental, involves many different collaborators and aims for the types of change that can seem intangible. For all these reasons, we are pleased that Tate Exchange is sharing its experience of using evaluation to shape its work.

In our experience, the challenges are not only to do with data collection and analysis but to do with integrating that evidence into an organisation’s thinking and planning. In this report Tate Exchange shares what it has learnt about these challenges. We hope that others will find their reflections of use, as they too encounter some of the challenges described here.

ANNA CUTLER  
DIRECTOR OF LEARNING, TATE

Tate Exchange is an open experiment that seeks to illuminate the value of art in society. It includes international artists, contributors from different fields, the public, and over 80 Associates (organisations and individuals) who work within and beyond the arts on trialling new participatory programmes, workshops, activities and debates. In its first year this activity took place at Tate Modern and Tate Liverpool.

Over the last decade we have seen significant shifts in the UK’s cultural landscape with changes in artistic practices and developments in wider forms of engagement. This can also be seen on a global platform and has led to much discussion and new forms of experiments in practice, including those of the museum. Much focus has been given to how institutions may develop a new and closer relationship with a wider public. What does this look like and what does this mean for participants, for practice and for the museum itself? Tate Exchange set out to explore these questions.

As an open experiment, it was vital to lay out our ambitions for Tate Exchange and test the results against previous research findings (what we thought we knew), educated guesses (what we thought this might mean) and some speculative programming (what we imagined we might trial in light of these). With such a wide range of potential to assess – with new Associates, new spaces, new processes and a new platform for public engagement – it was clear that part of the evaluation had to be finding out what aspects were required for evaluation itself, with a frame that maximised understanding.

In light of this an evaluation framework was devised that gave perspectives from the public, the institution and the Associates: a deliberate triangulation that would help expose what had taken place for each. In this we were then able to assess what, if anything, had changed. We measured change relative to the broad aims of creating a new social and civic space for debate and a deeper relationship with art for a broader public (with a specific focus on work for young people). We also looked to see if this prompted an emergence of new networks and practices.

Although much to cover, looking across the entirety to recognise and flag key areas for further exploration and evaluation was invaluable. We have found out a huge amount both as an intellectual experiment and as a pragmatic one. This report outlines how evaluation enabled these findings, (the evaluation report itself reveals the detail but in summary it is fair to say that we have already changed many processes. We have recalibrated what we thought we knew. We are able to make better-educated and less speculative guesses about ‘what next?’ We can point to the kinds of practice that yield high value for all involved (and why!) Enough was discovered to make a significant number of recommendations and put them into practice. This occurred both as a form of on-going critique as the programme unfolded (and this was essential reflection for those involved, who commented that it was one of the most important aspects of the process in being able to adapt and learn in-situ) as well as in response to summative findings.

Without evaluation one has work that happened. With evaluation one has an understanding of how it happened and what this means. In only one of these cases can we learn from what we do and aspire to do better!

Bedfellows: Sex Re-Education, Tate Exchange 2016

1 This will be available at: www.tate.org.uk/research/research-centres/learning-research

Hannah Wilmot outlines the three phases of Tate Exchange in Tate Exchange 2016-2017 Year 1 Evaluation Report
INTRODUCTION

EMILY PRINGLE, HEAD OF LEARNING
PRACTICE AND RESEARCH, TATE

Conversations about the evaluation of Tate Exchange began about the same time as the planning for the initiative. This is not surprising as the imperative for the Tate Exchange Research and Evaluation Programme (TEREP) came from the nature of the programme itself. We recognised early on that a programme as experimental, complicated and potentially challenging for the organisation and collaborators as Tate Exchange made it essential that we captured and understood what was happening from the very beginning.

TEREP built on and developed out of the research-led, values-based approach to programming and evaluation that Tate Learning have worked with for the last seven years. Documented as the Transforming Tate Learning programme [http://www.tate.org.uk/download/file/fid/30243], this way of working involves the Learning team framing their activities through the lens of research. In doing so they foreground questioning and reflection and build their and others’ knowledge through a process akin to action research and experiential model of learning. This follows a cyclical process of doing, reviewing, learning and then applying that learning. We were keen to continue using these principles in our work in Tate Exchange.

We also wanted to work alongside the Tate Exchange Associates, not least because these Associates include arts, health and community organisations and universities, all of whom bring their own expertise, approaches and priorities regarding research and evaluation. TERE built on and developed out of the research-led, values-based approach to programming and evaluation that Tate Learning have worked with for the last seven years. Documented as the Transforming Tate Learning programme [http://www.tate.org.uk/download/file/fid/30243], this way of working involves the Learning team framing their activities through the lens of research. In doing so they foreground questioning and reflection and build their and others’ knowledge through a process akin to action research and experiential model of learning. This follows a cyclical process of doing, reviewing, learning and then applying that learning. We were keen to continue using these principles in our work in Tate Exchange.

Year 1 of Tate Exchange was a pilot year that would shape the project as it developed in subsequent years. This and the framing of Tate Exchange as ‘an experiment in practice’ gifted us the opportunity to interrogate how an explicitly research-based and largely untried programme develops over time. We needed to examine what challenges and opportunities it posed for the organisation, collaborators and participants. It was important that we gathered evidence of what changes an initiative of this scale brings about at an individual, institutional and potentially societal level. Indeed, Tate Exchange’s stated ambition ‘to explore the role of art in society’ could not be achieved without a thorough investigation of how the programme operated and how visitors and collaborators responded to it.

Alongside others across the sector we have been seeking to find methods and approaches that capture the experience of those participating in creative and cultural experiences and the value of those experiences (Cultural Value report 1). We want to know what changes for someone when they take part in a creative and/or discursive event in the art museum. Is that experience richer and deeper if it involves collaboration and hands-on participation? Do some forms of participation work ‘better’ than others and if so why, and for whom? Who feels unwelcome and less able to join in, while others feel confident? What can we do to change this? What does it mean for the museum and for artists and Associates to work together in this new way? These are some of the very many questions that we grappled with and which underpin TERE, shaping the methods we adopted and the systems and processes we put in place.

From the start we committed to a developmental approach to the evaluation, understanding that its purpose was to help Tate and others to understand the programme as it unfolded, so as to inform its (and hopefully the sector’s) future development in positive and productive ways. However, we acknowledged that the evaluation would also need to have an accountability function. It would be required to explain, to a range of key stakeholders within and beyond the museum, what had taken place and the extent to which the programme had achieved its aims and objectives. The evaluation also aspired to support the values and ambitions of Tate Exchange through empowering participants and Associates to examine, review and account for their experiences for themselves and to actively contribute to all our learning and to the programme’s ongoing development. Referencing the Tate Exchange aims and objectives and working within the parameters of the evaluation framework drawn up by the Tate Exchange Evaluator, we undertook formative evaluation. This involved working with Tate staff, Associates and participants to gather, analyse and reflect on data from the start of the project in September 2016. This process continued throughout the nine months and three phases of Tate Exchange and culminated in a phase of summative evaluation to capture what had taken place in the first year.

As with the programme itself, TERE has also been an experiment in practice. We recognised that because of Tate Exchange’s scale and complexity it would be useful to trial and adapt different methods. Accordingly, we revised as we went along, when we recognised that we were not getting the data we needed, or that unexpected insights were to be gained from focusing on a particular area in a way we had not and could not have predicted. This no doubt lays TERE open to criticism that the process has not been sufficiently ‘rigorous’. However, our ambition was not to prove or test a hypothesis, nor to determine the extent to which one group benefited more than another from taking part. Instead we sought to understand more deeply and clearly how and why an
intervention such as Tate Exchange operates in the museum and society and what changes it brings about for all those taking part. For us, therefore, the ‘rigour’ of the evaluation was determined by criteria that include the authenticity, trustworthiness and utility of the findings, rather than the extent to which the evaluation corresponds to a specific ‘scientific’ approach to research. In other words, do the findings even those that are uncomfortable ring true? Do we trust them to be an accurate representation of people’s experiences? Are they useful to us and others? This is what mattered to us.

So what have we learnt? We know now that the process of evaluating a new, large-scale, multi-stranded and multi-partnered initiative is difficult, complicated, time-consuming, at times frustrating and potentially overwhelming. It requires patience, commitment, tenacity, creativity and curiosity. It is helped enormously by being imbued with a spirit of generosity, goodwill and humour. We understand better how to collect, analyse and reflect on various forms of data and can see what that data can and cannot tell us.

We recognise how and why evaluation can have a significant and positive impact on the quality of a programme. TEREP has shown us how evaluation can enable challenges to be addressed and resolved and how good practice can be built on so that those involved, from programme organisers to participants, can learn and grow. It has helped make explicit the causal relationships between decisions made by programme developers and the resultant experience of participants, while revealing the connections between visitors’ motivations for taking part and the value they ascribe to that participation. It has enabled us to be clearer about how to manage relationships with organisations and individuals. Evidence derived from different sources – be it observations, questionnaire responses, stories, direct feedback from Associates or comments from visitors – has moved us beyond our hunches and preconceptions to provide insights that can improve our practice and communicate what we do to others.

But this process takes time, a degree of confidence and skills and a commitment to honest appraisal. There is great temptation to use evaluation as a form of validation, but this is ultimately unhelpful if not actively damaging. Relying on what Hannah Wilmot, the Tate Exchange Evaluator, refers to as ‘the warm glow’ of affirmative feedback, or choosing only to consider and report on the positives, prohibits learning. This is not evaluation, but merely advocacy. Effective evaluation is skilful and there is a need for more professional development across the sector to support practitioners to undertake it well. Funders can also play their part by working in partnership with organisations to ensure that the relationship allows for programme findings to be reported honestly and authentically. We have been privileged to have been able to work with the Paul Hamlyn Foundation on TEREP, benefitting enormously from their commitment to investigating and improving evaluation practices. We hope that this work will be of value to the sector more widely. We certainly do not have all the answers, but in the words of the Arts Evaluator Saville Kushner, evaluation is as tricky as the practice it seeks to represent and all evaluators can ever do is their best. What we hope to communicate in this publication is all of us involved doing our best.

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How did we undertake the evaluation?

At the start of September 2016 we were awarded a grant from the Paul Hamlyn Foundation to undertake a research and evaluation programme for the first year of Tate Exchange: The Tate Exchange Research and Evaluation Programme (TEREP) that we committed to in 2015 involved:

- The development and sharing of an evaluation framework
- The provision of ongoing support for Associates and Tate staff as they evaluated their projects and developed practice as research projects
- The detailed investigation of six case studies drawn from Phases 1 and 2 of Tate Exchange
- Research events to bring together a wider group of experts at key moments
- The dissemination of findings through reports and a final event

As Tate Exchange programme started on 1 October 2016 we had to move quickly. Our first step was to appoint Hannah Wilmot to be the evaluator. Hannah drafted the evaluation framework, which was shared with staff and Associates in October. From then on the process involved Hannah working with staff and Associates to plan their evaluation, gather data and analyse and share findings through reflective evaluation forums. At the same time Helena Hunter, Learning Research Assistant Curator, was working with a number of staff and Associates on a series of practice as Research projects and the Experiments in Practice research event, which took place on 5 June 2017.

Concurrently at Tate Liverpool Jessica Fairclough oversaw a programme of data collection and analysis with the Tate Liverpool Tate Exchange Associates. Additional evidence came via specific research projects, three of which we commissioned and two that were instigated by researchers who were keen to work with us. The final phase of Tate Exchange, which took place from May 18 to June 11, was framed in its entirety as an evaluative exercise: an invitation to the public to reflect on the value of art in society and share their thoughts publicly. At the culmination of all this work Hannah brought the evidence together and summarised her findings in an Evaluation Report.

This publication details our experience of this process, with reflections from those involved. It does not outline the evaluation findings (for those, go to the Evaluation Report), but rather tries to make visible how we set about gathering and analysing data, what each of these approaches gave us and what we learnt (a lot!). We would like to think that the information provided here is helpful to anyone thinking about or doing evaluation. Not all of it will be relevant or possible, but it is here to be used, critiqued, improved, changed and expanded. We are still learning and have already applied some of what we found out through TERE through other projects, making adaptations according to what resources we have available. We see this publication as a resource and hope that you might too.

TEREP Internal planning doc.

In this first twelve months TERE brings together Tate staff and Associates who are working on Tate Exchange in a process of evaluation and knowledge sharing. Specifically the programme includes:

- The development and sharing of an evaluation framework
- The provision of ongoing support for Associates and Tate staff as they evaluate their work and develop practice as research projects
- Detailed investigation of six case studies drawn from Phases 1 and 2 of Tate Exchange
- Research events to bring together a wider group of experts at key moments to share the experience to date and draw on a wider body of knowledge to inform the programme going forward
- The bringing together and sharing of provisional findings in June 2017 via a report and conference.

Photograph: Minutes from the TERE Steering group, 24 October, outlining the rational and priorities for the evaluation.

Details of the TERE programme taken from an internal planning document.

EP outlined aspects of the project: Tate has proposed to the Paul Hamlyn Foundation (PHF) that we will look at 6 case studies for Year 1 (3 in Phase 1 programmed by Tate Learning and 3 in Phase 2 programmed by Tex Associates). We can be provocative, but we should be honest and acknowledge any difficulties and the reported learning must be backed up with evidence.

We and PHF are particularly interested in looking at the following:
- How the institution changes as a result of the project
- How the people taking part change
- Is it even possible to evaluate a project of this scale?
- What methodologies will be used?
- How evaluation processes can be improved.

The following 3 strands for the research and evaluation project have been agreed:
- Evaluation: capturing experience of the participants & institutional change, teams and associates to self-evaluate & analyse, with additional case studies (led by HW)
- Practice as research: team and associates reflect on their practices (lead by HH)
- Research will be hosting discursive symposium event days discussing particular issues, the outcomes of which will be made public. The learnings from these events will help to inform Year 2
REFLECTIONS
EVALUATION FRAMEWORK
HANNAH WILMOT, TATE EXCHANGE EVALUATOR

I introduced the evaluation framework to Associates at a meeting in October 2016. Emily outlined the overall approach and I reinforced this holistic approach through a model of a swimming duck. I’ve attached a photo of my annotations on the image below. The idea behind the model is to start talking about the duck (representing your project or a participant) and the aim is to get it from A to B across the pond. Looking above the water – it’s about outcomes – does it make it? But, we need to look below the water too, to understand how and why it did or did not make it. Maybe its legs are tangled in weeds etc.

The model hooked people in and after the break, Anna Cutler said she'd had conversations with people about ducks that refused to swim, turned around or appeared to be swimming around in circles!

Evidence was gathered through observation (including participant observation), interviews and conversations, surveys, written feedback and online comment, participative evaluation at events and facilitated reflection sessions. The main sources of data included:

- Six case studies undertaken by the evaluator with additional notes on events and meetings throughout the year.
- Reflection sessions with Learning teams, Associates and the Tate Exchange team.
- Event reports on 19 Phase 1 events (from a total of 21) and 23 Phase 2 events (from a total of 39).
- Digital analytic reports and Tate Exchange Online R&D report from Tate Exchange Digital Producer.
- Daily reports written and circulated by the Visitor Experience staff seconded to Tate Exchange.
- An analysis of 77 Daily reports undertaken by consultant, Nicki Setterfield.
- Monitoring and statistical data gathered by the Tate Exchange team.
- Tate Exchange Qualitative & Quantitative Research by Scher Insights based on 593 surveys completed by randomly recruited audiences at six events and 40 follow-up telephone interviews.
- Two sets of interviews undertaken by Nicki Setterfield with a small sample of Associates to chart their experiences with Tate Exchange.
- Interviews undertaken with senior leaders at Tate Modern as part of research undertaken for Tate Exchange by Clare Fellow, Maurice Carlin.
- A case study on Complaints Department Operated by Guerrilla Girls undertaken by PhD student, Hollie MacKenzie.
- An evaluation report on Tate Exchange Liverpool written by the Tate Exchange Coordinator, Jessica Fairclough and drawing on evaluation undertaken by and with Associates in Liverpool.
FIVE ACTIONS WE THINK WORKED WELL

1. Framing Tate Exchange as an ‘experiment in practice’ and foregrounding reflection and the importance of evaluation throughout. Although this proved challenging for some, it made clear the expectation that all involved would commit to evaluation, while opening up a space for experimentation, risk-taking and rich, thoughtful practice.

2. Undertaking formative evaluation from the start of the programme. Gathering data from day one enabled us to capture what was happening and adjust the programme according to what was working well or proving difficult.

3. Implementing reflective meetings with staff and evaluation forums with staff and Associates. These meetings gave people the opportunity to come together, step back from the intensity of programming, reflect on issues, identify problems and successes, and raise questions. Having Hannah record these sessions and feed them back to us also helped staff and Associates identify how their learning fitted into the bigger picture of the evaluation process.

4. Meeting with the TEREP Steering Group. This allowed us to test ideas with a group of expert colleagues, including some Associates and Jane Steele from PHF. The open, honest conversations in the meetings helped refine our ideas and sharpen our thinking.

5. Involving Associates and Tate staff in the process of gathering and analysing evaluation data. This was essential with a programme of the size and complexity of Tate Exchange. Some found it very hard to carve out the time and/or appeared not to have the confidence or skills to undertake it, but overall the evidence and insights provided by programmers, Visitor Experience staff and others has been invaluable.

FIVE THINGS WE WISH WE HAD KNOWN BEFORE WE STARTED

1. The timeframe for putting the evaluation framework together was too short. Ideally there would have been more consultation with the users, but this was not possible.

2. Enabling those involved with the programming to step back and evaluate was difficult at times. This was mainly due to time constraints, but it was also about people being able to shift their focus from delivery to reflection.

3. Unless people see the value of evaluation and understand how it can inform and improve their own work, it is unlikely to happen in an honest, rigorous and comprehensive way.

4. Without more focused research it is hard to gather evidence of the longer-term impact of the Tate Exchange programme on those who took part – whether as invited participants in a programme or as visitors dropping into the Tate Exchange space. We have some indications, but need to follow up and do further work on this.

5. Guidance and support needs to be provided to those who are lacking in skills and confidence in relation to evaluation. This is an area where many feel ill-equipped and therefore resistant.
THE TATE EXCHANGE RESEARCH AND EVALUATION PROGRAMME (TEREP) STEERING GROUP

We took our learning from the Transforming Tate Learning project (www.tate.org.uk/download/file/fid/30243) and the value of having expert colleagues to meet with. We set up the TEREPI Steering group at the start of the programme. The group met four times over the course of the year and interrogated aspects of the programme at key moments. They also provided advice on, for example, the form and content of the evaluation framework and the content of the Experiments in Practice research event. Each meeting was minuted and issues were followed up in-between meetings when needed.

TEREP Steering group: Terms of Reference doc.

The TEREPI Steering group is made up of arts and education experts drawn from a range of disciplines who are committed to examining and improving the quality of current practice. Members of the group are: Emily Pringle (Head of Learning Practice and Research, Tate (Chair), Fiona Kingsman (Head of Tate Exchange), Helena Hunter (Learning Research, Assistant Curator), Helen Nicholson (Professor of Theatre and Performance, Royal Holloway), Chrissie Tiller (Creative Consultant and Practitioner), Helen O’Donoghue (Senior Curator, Head of Education and Community Programmes, IMMA), Lindsey Fryer (Head of Learning, Tate Liverpool), Hannah Wilmot (Tate Exchange Evaluator), Steve Moffitt (Chief Executive Officer, A New Direction), Jasmine Wilson (Director of Learning, Random Dance), Eileen Carnell (Freelance Arts Education Specialist), Jane Steele (Director, Evidence and Learning, PHF), Becky Swain (Learning and Participation Officer, Arvon).

This is a Steering group for the research and evaluation programme, not for Tate Exchange itself. As such, the purpose of the group is to assess and advise on TEREPI by:

- Reviewing the evaluation framework
- Reviewing and advising on evaluation methods
- Assessing evaluation data
- Locating Tate Exchange within wider theoretical and practice contexts
- Advising on research events
- Reviewing findings from TEREPI
- Making recommendations for the ongoing development of TEREPI
- Advising on the dissemination of TEREPI

The group will meet three times between September 2016 and July 2017.
The evaluation framework was developed by Hannah Wilmot, Tate Exchange Evaluator. It set out the generic indicators of success for each objective, described methods that we would use to collect evidence and assigned responsibilities and timings for data collection. As well as the programme-level evaluation framework, Hannah also developed edited versions that highlighted areas of relevance for Associates and Tate staff. In the accompanying guidance sheet that Hannah prepared she stressed that the framework was a working document and urged users to take ownership by adding to the indicators of success and evaluation methods. We also recognised that Associates and staff might have their own areas of enquiry and left space for users to add their own objectives.

The evaluation framework was used in different ways – some found it helpful in planning their events, others used it to structure their evaluation activities. Some paid little attention to it. As well as the written guidance, Hannah also provided one-to-one planning sessions for some staff and Associates. Although time consuming, this was seen to be extremely helpful and resulted in more detailed and effective data collection. However, feedback from the Associates at the final evaluation forum revealed that they found the Tate Exchange objectives too complex. We will be revising these and the framework itself for the Tate Exchange Year 2 programme.

**EXTRACT FROM HANNAH WILMOT EVALUATION GUIDANCE NOTES THAT ACCOMPANIED THE EVALUATION FRAMEWORK AND WERE SHARED WITH STAFF AND ASSOCIATES**

**UNDERTAKING YOUR EVALUATION**

The focus for your evaluation is two-fold:

- Evaluating participants’ experiences and outcomes. (How is art making a difference to people’s lives and society?)
- Reflecting on your own/your organisation’s experience of Tate Exchange and outcomes that accrue. (What is TEx enabling you to do that is new?)

You may have established evaluation protocols that you can adapt for Tate Exchange. If not, we suggest the following steps:

- **WHY ARE WE DOING THIS?** – Discuss and agree with all partners the overall aim of your activity.
- **DEFINING SUCCESS** – Review the Tate Exchange evaluation framework and customise it to reflect your activity. Decide which indicators of success are relevant to your activity and modify these so they describe what success will look like for your participants taking part in your activity. We don’t expect each event to address all objectives and indicators.

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**THE EVALUATION FRAMEWORK**

Having evaluation front and centre in the Associates programme planning for Year 1 was for many Associates deeply rewarding. With over 50 Associate partners to anchor and to ensure a quality threshold was met, being guided by the evaluation framework was a practical tool that cut fast to the objectives and ambition of each programme in the planning stages. We were able to use the guiding questions to support early production meetings and the sharp focus on audience and public participation may have suffered from creep if this wasn’t present in these measures to be met early on. Some Associates were using the rigour of a framework like this for the first time and it was clear they would be using the methodology in their own programmes in the future.

Quote from Erin Barnes, Tate Exchange Associate Producer
This is the version of the evaluation framework that was shared with Learning staff. It includes the prompts for specific indicators of success specific to their events.

**Aim:** The Exchange aims to consider what role of art might be in relation to broader societal questions and structures, specifically to better understand how art makes a difference to people’s lives and through that to society more widely.

**Purpose of your programme:**

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<tr>
<th>Table: Exchange Evaluation Framework - Tate Learning Staff</th>
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<tbody>
<tr>
<td><strong>Aim:</strong> Tate Exchange aims to consider what role of art might be in relation to broader societal questions and structures, specifically to better understand how art makes a difference to people’s lives and through that to society more widely.</td>
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<tr>
<td><strong>Objectives:</strong></td>
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<tr>
<td><strong>1.</strong> To create a common space (virtual and physical) for artists to present new ideas and perspectives that contribute to cultural and social issues of our time.</td>
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<tr>
<td><strong>2.</strong> To engage a deeper relationship with artists in broader public through new partnerships, and to encourage engagement with art, culture, and engage new social opportunities.</td>
</tr>
<tr>
<td><strong>Indicators of Success:</strong></td>
</tr>
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**Indicators and Evaluation Questions:**

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<td><strong>Email: Tate Digital</strong></td>
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**Learning from TEREP:**

- Supports and informs organisational development at Tate as it approaches partnership working, professional development for staff, working with artists, etc.
- Provides opportunities for collaboration, networking, and for different organisations to share ideas and experiences.
- Learning staff and end of event.

<table>
<thead>
<tr>
<th><strong>Email from Hannah Wilmot:</strong></th>
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<tbody>
<tr>
<td><strong>Email from HR to RE about evaluating art</strong></td>
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</table>
| **Email to the Curator for Emergent Landscapes, Rob St John:**

*Minutes from TEREP Steering Group meeting, 24 October 2016, detailing their views on an early draft of the evaluation framework.*

*Caption: Minutes from TEREP Steering Group meeting, 24 October 2016, detailing their views on an early draft of the evaluation framework.*
The Tate Exchange evaluation programme relied to a great extent on staff and Associates undertaking data collection and analysis for themselves and reporting their findings to the evaluator and the Tate Exchange team. The event reports were key to this, providing a series of prompts and a suggested format to structure evaluations on individual events and programmes. The quality of the submitted event reports varied. Some focused mainly on the logistics; some read essentially as advocacy documents with little or no critical analysis; others provided detailed evidence and analysis of the creative learning that took place and the nature of engagement by participants and visitors to the floor, with recommendations for future practice.

For a multitude of reasons and despite good intentions not everyone completed an event report. This variability was indicative of the time, capacity, confidence and experience of the organisations and individuals with regard to evaluation. However, in nearly all cases, we gained insights into the staff and Associates’ experiences that informed the ongoing development of the programme.

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### TATE EXCHANGE: EVENT REPORT

This form sets out a suggested structure for your Tate Exchange evaluation report. Depending on the nature of your event, some questions may seem more relevant than others and we expect that people will provide varying levels of evidence and analysis in differing areas - that’s fine. You may also want to use the headings and questions in this document as prompts for your reflection at team meetings, debriefs with artists etc. Our aim is to open up reflective conversations so please view the questions on this form as a starting point, not a definitive list.

| 1. Event title |
| 2. Lead artist(s), partners and coordinators |
| 3. Event aim: What’s the big idea? |
| 4. TEx context: e.g. What exchanges are taking place? What was new about this work for the artist/Tate/associate? Did this new element/approach introduce risks or concerns? How does this project relate to TEx in the digital sphere? |

| 5. Event description: Briefly outline what happened including any challenges and if/how these were overcome; plus details of if, how and why the project’s objectives, structure etc changed during planning. |
| 6. Target audience |
| 7. Numbers involved in putting the work together |
| 8. Attendance numbers: In the space and online. |
| 9. Comments on the space: How it worked and why (or why not). |
| 10. Evaluation of participant experience, planned and unplanned outcomes: How has the project made a difference to people’s lives? Refer back to your Evaluation Framework (provide evidence to show how you know what you know). |
| 11. Outcomes for you: e.g. What did TEx enable you to explore? What have you learnt? Will this support or change how you work in the future? |
| 12. Outcomes for the Artist(s): e.g. How did public participation influence the art? What, if anything, has changed about the artist’s approaches to/interest in socially engaged practice? |
| 13. What was problematic and why? What would you do differently? |
| 14. Project documentation, archiving and legacy: e.g. Does the project have a future life? Has it been a catalyst? Is work being archived? Will you share findings with others? |
| 15. Key learnings for TEx: e.g. about the role of art; about the space, about approaches to engagement etc). What worked well (3-5 points) What didn’t work (3-5 points) |
| 16. Identify 3 key photographs: Please supply direct hyperlinks for each image from your event’s image folder on T Drive. |
| 17. Identify 3 key social media posts: Please copy and paste the direct links. |
| 18. Details of online content produced for the project |
| 19. Any new questions the event has provoked |

Tate Exchange event report pro formas. Developed by the Tate Exchange team and Hannah Wilmot and sent to staff and Associates.
A reminder then of why evaluation is important. TEX is founded on reflective practice that informs all our ways of working together. In this open experiment, evaluation is fundamental to us understanding what’s happened, why, and how this can influence the future success of the programme. Observations, no matter how big or small are important to us. We hope that you have found the evaluation framework to be valuable in terms of planning and shaping your own evaluation and in helping with the completion of your event report. We know that it often feels like more to do, but the event reports from Phase 1 fuelled the interim findings which supported Phase 2 and in an evolving programme all your feedback, thoughts, reflection and comment are essential to growth, understanding and strengthening what we do.

Attached again here is the short event report doc to complete once your programme is over in this Phase. We’d ask that you diarise sending it to us no later than 2 weeks post programme - time for the dust to settle, to draw breath, but while the experience and what you have learned and have to say is still fresh! Bullet points and brevity is absolutely fine, we know how busy everyone is, but the more you can share, the better. This exercise should be a chance for decompression, reflection and frank appraisal.

With enormous thanks in advance then, looking forward to all the programme still to follow and to sharing and celebrating on 9th May.

Best wishes
Anna

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A continued challenge with working with so many partners is how to ensure a sense of uniform approach that all 50+ organisations play into but avoiding a framework that risks looking like form-filling. Flexibility was offered throughout and reports were reduced to key pointers, prompts and simple framing, but work could be done here to offer a broader spread of routes into reporting and we’ll continue to explore together with them as to what this could look like in future years.

Quote from Erin Barnes, Tate Exchange Associate Producer
At the end of Phase 1 we brought Tate staff together for a two-hour session facilitated by Hannah Wilmot to reflect on Tate Exchange and the evaluation programme at that moment. The session also provided an opportunity for Hannah to gather further insights through a storytelling exercise (see STORYTELLING chapter). We repeated the exercise with staff in April 2017 to gather more data, particularly in terms of staff perceptions of Phase 2. We had extremely positive feedback on these meetings.

These reflective comments from Fiona Kingsman, Head of Tate Exchange, give a sense of their value for the Tate Exchange team at Tate:

**REFLECTIONS**

EVALUATION FORUMS WITH STAFF AND ASSOCIATES

FIONA KINGSMAN, HEAD OF TATE EXCHANGE

I have found the evaluation forums with staff and Associates to be really beneficial. The first one, held during Phase 1 with the Learning team, felt like an important moment when we collectively shared our experiences. I thought the ‘storytelling’ method that Hannah used was appropriate to this type of programming. It allowed people to capture observations of the ways that they had seen or heard the audience respond to the programme, and to allow them to make their own analysis of what they thought was happening. It was also an important moment for me as Head of Tate Exchange, as it allowed me to see how the different team members saw the ways in which the Tate Exchange team and their own programme teams were working together, and the different roles and responsibilities that we were taking on.

The second evaluation forum with Tate staff, when we asked them to reflect on the Associates phase of the programme, was interesting as it revealed more of an appetite for future collaboration with Associates than I had been previously aware of. This was partly out of a sense of disconnectedness from their programme, which may have felt strange for staff who had previous relationships with Associates. I think Hannah managed to push us further to unpack what steps we thought were needed to further embed, collaborate and integrate the programme within the Institution. Upon reflection, we could be quite critical of ourselves and the programme. We acknowledged that while much progress had been made in Year 1 there was still a very long way to go to fully realise the aims and objectives we had set ourselves.
At the Tate Exchange evaluation forum with Tate staff in January 2017, Hannah introduced a storytelling exercise to gather data on the perceived difference that Tate Exchange was making to participants. The exercise involved staff telling a story via text and/or images and then coding their story according to a set of criteria that Hannah had developed with Tate Exchange’s aims and objectives in mind. Both the telling and the coding enabled staff to reflect deeply on aspects of the programme, on participants’ experiences and on the conditions that support positive change. It also proved to be a powerful tool for gathering qualitative evidence and Hannah repeated the exercise at a TEREP Steering group meeting. The concept of ‘telling a story’ also informed the You Are Welcome project in the final Phase 3 of Tate Exchange (see TATE EXCHANGE PHASE 3 – YOU ARE WELCOME chapter).

**Stories about Tate Exchange making a difference to people’s lives**

Is your story about…?

1. Having fun and feeling welcome
2. Active participation/making
3. Having a chance to try and learn something new
4. Intergenerational exchange and learning
5. People feeling their ideas, views and contributions are valued
6. Conversations
7. Engaging with art
8. Engaging with an artist
9. Engaging with ideas
10. Being surprised
11. Engaging with and debating societal issues
12. Seeing things differently
13. Exchange
14. Feeling solidarity
15. Empowerment
16. A shift in atmosphere/body language

All the elements featured in at least two stories.

Our stories provide evidence of the conditions that support change. The most common features in stories about making a difference to people’s lives were people feeling their ideas, views and contributions are valued and active participation/making. (Both featuring in 10 of the 14 stories). Close behind (featuring in 9 stories) were conversations, being surprised and engaging with art and artists.

Extract from ‘Phase 1 Interim Report’ by Hannah Wilmot, summarising what the stories revealed.

I was standing on the floor near the entrance on the first day of the Regal programme. Anna was starting to tape up the space – there was some tape already crossing level 5. A family came in (father, mother and young boy - probably about 8 years old).

I didn’t see the boy start connecting the blue tape, but when I returned, he was already completely involved - adding pieces of tape between the pillar and the wall. I watched him for about 15-20 minutes and for all of that time he was utterly engaged - at one point, he taped himself into the web without realising and then spent some time carefully retracing himself before carrying on. I could see him making careful creative decisions - he was not randomly adding tape. He had a clear ambition and was intent on realising it. He seemed oblivious to what else was happening in the room and would not stop even though at one stage his father urged him to do so, as they wanted to leave the room. Then, at a certain moment, he had obviously realised his design and stood up, having shown it to his parents, he left. (1, 2, 3, 4).
IN OCTOBER, THE CURRICULUM GIRLS INVITED THE PUBLIC TO...

POST THEIR COMPLAINTS

MOST OF THE COMPLAINING
THE PLACE IN THE GALLERY, BUT
WITH SOME ENCOURAGEMENT PEOPLE
BEGAN TO POST...

...BUT WHAT WAS MOST
EXCITING TO ME WAS THE
SHORE NUMBER OF
YOUNG WOMEN;

SHARING + CELEBRATING EMPOWERED FEMALE ARTISTS
ACROSS SOCIAL ( @ ) EVENTS AND ALL.

[1, 2, 4, 5, 7, 8, 10, 11, 14]

TEX Evaluation Forum – Monday 16 January 2017

Brief Introduction re. Event Reports – really valuable learning on e.g. challenges faced, use of space etc. and not going over the same ground in this session. (5 min)

Storytelling (10+10 min)

• Think about the events you worked on last term and the time you spent on the floor, observing, helping and talking to people who participated. Tell me a story about a time when Tate Exchange made a difference to someone who came to an event.

• Coding – Is your story about...?

I wish I’d taken photos of people writing their stories during the first evaluation forum as this was significant for me – I used storytelling as I’d indentified a gap in the event reports from Phase 1 relating to outcomes for participants. I knew Learning staff had ‘anecdotes’ and I wanted to gather these and also through analysis of these stories, show how qualitative and anecdotal evidence can be powerful if gathered in quantity. The exercise resonated with people and the stories we collected were diverse, revealing and often moving. I was delighted when Sarah Carne picked up on the idea of "Tell me a story about..." when I shared the method with her. The public have responded enthusiastically to Sarah’s invitation and given a great deal of time and thought to their responses.

Hannah Wilmot’s reflections on the storytelling process.
At the culmination of Phase 2 Hannah Wilmot led an evaluation session with Associates. Over the course of the morning, people worked in groups and individually, responding to a series of questions and exercises devised by Hannah. This event provided a discursive space where Associates could share experiences, learn from others and look back on their first year. It also enabled us to dig deeper into what had worked more or less well (with the programme and the evaluation) and to gather additional data relating to the difference that Associates’ events had made to participants.

**REFLECTIONS**

**THE ASSOCIATES DAY EVALUATION FORUM**

**FIONA KINGSMAN, HEAD OF TATE EXCHANGE**

The evaluation forum with Associates I also found really useful, as with such a wide and diverse group of people I think it was important that people felt that they could be honest in their responses, and could be critical of their experience. This is all healthy and chimed with some of the reservations we may also have had about some of the programme or how it was supported within Tate.

**4. Update on Associates Day (HW)**

- Associates Day:
  - 64 attendees
  - Morning was about reflecting and evaluating year 1
  - Afternoon was about year 2
  - Was an opportunity to gather more feedback to fill in gaps of reports numbers (so far 16 reports for 45-ish events) and content was very varied (some overly positive/not evaluations, others very rigorous).

Minutes from the TERE Steering group meeting, 13 June 2017, giving an update on Associates day by Hannah Wilmot
COMMENT CARDS AND WRITTEN FEEDBACK FROM AUDIENCES

Throughout the three phases of Tate Exchange we were very keen to encourage visitors to share their experiences and feedback, either verbally or by completing a comment card. By posing the question ‘what did you think?’ on the cards we invited and received a variety of responses that ranged from the superficially affirmative – ‘we had a great time’ for example – to more detailed and thoughtful articulations. A number of Associates also installed their own feedback walls prompting visitors to tell us about their experiences and their views on specific issues that were being addressed within the event. On its own, this feedback could not provide sufficiently detailed or critical evidence, but when triangulated with other data it helped inform our findings on audience experience.

Written audience feedback from Thicket, with Raqs Media Collective; Tate Exchange 2016

An amazing event which shines light on something which is considered a taboo but should be accepted.

Written audience feedback for Chain Reaction: How Are You? Tate Exchange 2016

Details of feedback wall for Who Are We? With Counterpoints Arts, Loughborough University, the Open University, University of Warwick; Tate Exchange 2017

Comments Report from Phase 3 You Are Welcome showing how the comment cards are logged at Tate
THE DAILY REPORTS

The daily reports, written at the end of each day by Visitor Experience staff working on the Tate Exchange floor, proved to be one of the most useful records of what was happening and how visitors were responding. Each report provided rich and detailed insights and because they were completed by a number of people we were able to see the programme from a range of perspectives. Having these daily updates enabled the Tate Exchange team to respond quickly, for example by picking up on social media links or adapting the layout of the space. Over time the reports revealed trends in visitor behaviour and at the culmination of the programme we commissioned a researcher to analyse all 77 of the daily reports. This analysis contributed to our understanding of key issues, including visitor dwell times and the extent to which intergenerational learning was taking place.

Guidance on Writing the daily reports:
Jane Wells, Tate Exchange Programme Manager

The TEx daily reports are a combination of personal observations, quotes, images, comment cards and total numbers of visitors on the floor.

They are written by staff who manage and welcome on the floor.

A range of people cover this role: Tate Exchange Programme Co-ordinator, the Head of Tate Exchange, the Producers and the Tate Exchange Assistants.

We send these daily reports to Anna Cutler, Hannah Wilmot (hannahwilmot@talktalk.net), Fiona Kingsman, Emily Pringle, Jane Wells, Helena Hunter and Rita Evans.

It is best to include in these reports:
- The general feel of the day: Was it busy, exciting, calm, quiet, reflective?
- What types of visitors came: Adults, families, school groups, young people?
- What types of conversations did we witness?
- Direct quotes.
- Pictures taken with the iPad on the day: these need to record the type of visitors, the atmosphere of the day, some of the work created on the day, any feedback which might have been left in the space (such as quotes on blackboards).
- Scans of the most interesting comments cards left on the day.
I felt the daily reports were challenging as they were written at the end of a long day, at closure time, when my energy was at its lowest. The other challenge was the need to fulfil several roles at the same time on the floor:

– One of the roles is that of welcoming and starting conversations with visitors. This requires you to be receptive to people's needs. Sometimes this is obvious and you can go straight to the point and help people pretty quickly (confident visitors ask direct questions and know what they want from you). With other visitors it takes more time; a longer conversation with the visitor might be needed, a bit of guesswork might be unavoidable. Some visitors want to be left on their own at first – they want to discover things at their own pace – and will then come back to you to fill in the gaps. This asks for a constant level of receptiveness and energy, which you then pour into this one-to-one relationship.

– The other role is that of the active-observer. This means that while you are helping visitors you also need to purposely record what you are saying and what the visitor is saying at the same time. Quotes need to be written down as soon as you have a moment away from the visitor. It also means sitting as a silent observer, a bit similar to the work of a spy, so you can hear genuine conversations. It is easier to take notes during those sessions.

– Other times you are one of the participants, taking part in the workshop, activity and conversation in the same way the visitor might. It is a great way of understanding what is truly happening on the floor, how the activity might be managed, what is working and what isn’t. It is also an efficient way to encourage visitors to take part in the activity, especially if it is a quiet day.

– The other is more practical: recording visitor numbers means you need to always be aware of who is walking through the door. To catch a great picture you need to be ready with the iPad without interrupting a great conversation you might be having. Being aware of people who might be leaving means you can catch them and convince them to leave feedback.

With time I relished writing the daily reports and they did become easier; those different roles become more second nature and automatic. It is just a great way of being extremely self-aware of how you are doing your job: using a critical eye but also observing what you do very well. It is a great way of challenging yourself to do things you thought you were incapable of doing, because you want to tell a good story in your daily report.

It is also a great tool to go back to. There is so much going on at Tate Exchange, days can merge into each other and you forget what the programmes were. With the updates you can go back to a day you worked and remember it all, as you might with a diary of your life.

It is also a great way of informing others of what you did when they were absent. It reinforces relationships in the team, keeping them informed of your challenges as well as the rewards you experienced. The reports are briefs for staff coming into a new programme so they know what to expect. This means these members of staff, being acquainted with the programme, are more efficient on the floor.

It also means visitors get the most of you. You become so aware of what works and what doesn’t work with visitors that you get better further down the line. You become more confident, keener.

All of these aspects of the role contribute to the development of Tate Exchange. The essence of the programme is about how visitors are welcomed, how visitors get to communicate with you, Associates, artists and other visitors, and how repeat visitors become Tate Exchange visitors because they liked how they were treated and then come back for more. When they return they come with the knowledge, the tools and readiness needed to participate better. They have new energy because they have reserved their energy for use in the Tate Exchange space. They automatically use Tate Exchange values, they take risks, they trust us and the programme, they are generous with their contributions and feedback, they are incredibly open (revealing aspects of themselves and their experiences which you might think were reserved for close friends) and they are very curious about other people.

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In addition to supporting Tate staff and Associates, Hannah Wilmot undertook six detailed case studies: three from Phase 1 and three from Phase 2. With such a large and varied programme, it was impossible for her to attend all events. With the case studies, however, she had the opportunity to gain in-depth knowledge and experience of selected events, which provided a frame of reference for understanding wider reflections on the programme. Working through the evaluation framework with Hannah helped staff and Associates clarify what the programme was aiming to achieve and how they would recognise success. The additional focus on evaluation also inspired some to become more ambitious in their evaluation plans. One Associate, for example, introduced young evaluators as a result. Unlike the programmers who were coordinating events, the evaluator could focus exclusively on gathering evidence while ‘on the floor’. She designed observation and interview schedules that aligned with the agreed evaluation framework and focused her data collection. Hannah also had time to enter into extended conversations with participants, pushing them beyond their initial ‘warm glow’ response to explore the ‘why?’ and the ‘how?’ of their reaction, thus gaining greater insight into the impact of Tate Exchange.
Tate Exchange had a number of numerical Key Performance Indicators (KPIs) attached to the programme’s aims and objectives. For example, a key aim was to attract a higher percentage of diverse and younger audiences within the overall target visitor numbers. It was vital therefore that we counted the number of visitors, both online and in the Tate Exchange spaces. Our budget did not stretch to conducting research at every event.

However, we commissioned Sphere Insights, an independent market research consultancy, to undertake research at six events at Tate Modern and monitored visitor numbers on a daily basis. The findings from the commissioned research were valuable in that they corresponded with other data on the types of audiences attending. However, we were cautious not to make assumptions based on this evidence alone given the limited number of events and the occasionally small sample size.

We drew on other quantitative data, including digital analytics, to build up a picture of who was visiting. Some Associates also trialled experimental approaches to gathering quantitative data on their audiences’ experiences, with variable results.

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TATE RESEARCH CENTRE: LEARNING

Tate Learning is committed to examining how learning practice can be framed as a form of research and exploring how staff can locate themselves as practitioner-researchers. The Practice as Research programme for Tate Exchange built on existing work with assistant curators in the Learning team, but expanded this to focus on how to make visible and shareable the knowledge and methods generated from doing practice as research. Led by Helena Hunter, Learning Research Assistant Curator, the programme evolved from a series of conversations to culminate in a series of filmed performative interviews with assistant curators and Associates. The films were shown in the Tate Exchange space during Phase 3.

THE PRACTICE AS RESEARCH PROGRAMME

The Practice as Research Programme 2016–2017 included the following researchers: Rachel Noel (Assistant Curator, Young People’s Programmes, Learning, Tate), Adrian Shaw (Late at Tate Programmer, Learning, Tate), Chris Follows (Digital Learning Manager, Learning, Teaching & Enhancement, Camberwell, Chelsea & Wimbledon, University of the Arts London [Tate Exchange Associate]), Alex Schady (Fine Art Programme Leader, Central Saint Martins, University of the Arts London [Tate Exchange Associate]), Emily Stone (Assistant Curator, Public Programmes, Learning, Tate), Jo Addison (Course Leader, BA Fine Art, Kingston School of Art, Kingston University [Tate Exchange Associate]), Natasha Kidd (Course Leader, BA Fine Art, Bath School of Art and Design, Bath Spa University [Tate Exchange Associate]) and Jessie McLaughlin (Assistant Curator, Early Years & Family, Learning, Tate).

Initially the idea was to conduct a series of interviews with researchers to ask them about how research and practice operate differently within their work, and to produce a publication or toolkit from these interviews. However, it seemed more appropriate to incorporate the embodied presence of the researcher into the final outcome in order to capture the fluidity of the discursive face-to-face meetings. I became preoccupied with how we could register tone of voice and expression and develop a more haptic form of knowledge sharing. In order to do this it was important to break with the ‘to and fro’ format of an interview and develop a less formal mode of language that was open to improvisation and a sense of play. Here, I drew upon my own practice as an artist and previous experience of working with performance, film and exhibiting process-based materials in a gallery setting. I developed the idea of staging the interview to create a performative space within which researchers could situate and reflect upon their practice.

Through the process of making these films I developed an understanding of the value of research and reflective practice for curators, artists and researchers working within a museum context. It is interesting to note that since working with the researchers, three members of staff that took part in the Practice as Research programme have developed from assistant curators into curator positions.

I also acknowledged the challenges of this kind of research, in terms of making time and resources available to engage in the depth of process and thinking required, and the time to put learning into practice. Research and reflective practice require a different kind of temporality, a mode of attention that can seem at odds with the fast pace of production and outcome based programming. I became aware of how the researchers would feedback learnings into their projects, modifying as they developed their work. There was a sense of continual learning: testing, adapting and improving the quality and intention of each project. The opportunity to discuss and share methods for research and practice and to try and find a language for this proved rewarding. It developed an understanding of each individual’s practice, the values they cultivated and the specific methods that they could articulate and share.

The final films, each 10 minutes long and filmed by Gordon Beswick, invite the viewer into the researchers’ process as they reveal what influenced their thinking and approach to their work. The researchers share stories, objects and documentation and reflect upon what it meant to actively explore how art makes a difference to society through the Tate Exchange programme. The films were screened as part of Tate Exchange from 18 May – 11 June 2017 and will be available to watch on the Tate Research Centre: Learning website (www.tate.org.uk/research/research-centres/learning-research).
REFLECTIONS
THE PRACTICE AS RESEARCH FILMS
FIONA KINGSMAN, HEAD OF TATE EXCHANGE
I thought that the Practice as Research films produced by Helena Hunter were a very useful way of ‘digging deeper’ into the programmes that were featured, and there is probably further rich learning to be gleaned from the footage that wasn’t included in the final films. I think that this conversational approach probably helped the participants to reflect on their practice in a different way to a written report, especially those who were in conversation with a colleague. This may have prompted the partners to go further in their reflections than an individual writing their report alone.
THE RESEARCH EVENT – EXPERIMENTS IN PRACTICE

This research event provided an opportunity for Associates, artists and colleagues with an interest in and commitment to art and social change to come together, hear presentations and engage in smaller group discussions. Experiments in Practice was curated by Helena Hunter, Learning Research Assistant Curator at Tate. Here are her reflections on the day:

REFLECTIONS
THE RESEARCH EVENT – EXPERIMENTS IN PRACTICE
HELENA HUNTER, ASSISTANT CURATOR, LEARNING RESEARCH, TATE

I curated Experiments in Practice: Museums, Art Institutions and Social Change, a research event that was part of the Tate Exchange Research, Reflective Practice and Evaluation programme that took place on 5 June 2017 at Tate Modern. Over 80 curators, artists, academics, educators and museum professionals, who work within the UK and internationally, attended the event. The aim of the event was to address issues relating to social change within the art museum, by drawing on a variety of experiences and creating an open space to share experiences in practice, forms of social and institutional change and challenges and responses to this. This event focused on knowledge sharing and generation. It was a discursive event with speakers giving short provocations that were further explored through smaller working group sessions. The overarching questions that the event addressed were: What can museums and art institutions do in the 21st century to address issues of social change and how can they be most effective? What are the limits of what they can do and what can they meaningfully take on? How are they responding to and experimenting with the social, political and economic challenges of the times?

In terms of curatorial perspectives, participants emphasised the importance of shifting to a continuity model rather than a pop-up model, identifying a need for longer durational projects that can be more effective and better evaluated in terms of registering change. Those working with sectors beyond the arts emphasised the need for transparency and openness about processes, time, labour and budgets in order to nurture healthy relationships between artists, cultural organisations, local authority and other strategic bodies. The value of thinking differently about how success is measured was discussed, for example by ensuring focus is on people not projects and allowing individuals to decide what positive change looks like. There were concerns about institutionalised terms such as ‘diversity’ and ‘inclusion’ and a call for more critical perspectives that move beyond forms of recognition and acknowledgement. Questions were raised about how to create alternative identities that are not prescribed by the state. Cultural democracy and social justice were foregrounded. There was concern about art that engages in social work but often overlooks the knowledge base of this work, and there was concern about institutional practices.

On reflection, so much ground was covered during the event that it was challenging to collectively identify next steps. What became clear was the value of having this kind of open critical forum to share knowledge, experience and learnings. To build on this it would be beneficial to establish a small working group and a series of follow-up events focusing in on specific issues that arose during the day. It was clear that there were benefits in connecting individuals across organisations and sectors, building an ecology of knowledge and expertise that can be shared. This connectivity could extend to international colleagues in terms of learning from and exchanging practices in different contexts, particularly when borders seem to be closing down. Tate Research Centre: Learning will build on this research event and develop further research activity and follow up events in the 2017-2018 programme.
Phase 3 of Tate Exchange gave us an opportunity to reflect on the value of art in society in collaboration with our visitors. We wanted to invite people in to share their stories with us of how art can make a difference and to spend time reading their responses together. We invited the artist Sarah Carne to develop a participatory intervention that would enable direct engagement but did not require intensive facilitation. You are Welcome existed in the space from May 18 until June 11 2017, was visited by approximately 3,000 visitors and generated over 500 individual stories.

I determined to adhere to two principle aims: to clarify and amplify the central message of Tate Exchange ‘How can art make a difference to people’s lives and society?’ bypassing the need for staff to hold expert knowledge about individual activities, and to create an invitation that required only personal experience and allowed for varying degrees of response. It was also vital this contribution would be visibly valued as a gathering of first hand evidence.

In conclusion, You are Welcome might be understood as a process of evaluation in action that successfully asked for the accumulated body of responses provided insight into the multiple ways people feel art is a catalyst for transformation.

I am, however, conscious that owing to a number of factors there was a lack of diversity in the contributors and any reflection on the accumulated content must acknowledge this. Each level of enquiry needs to be considered in the context of the circumstances that have created it and its construction in an attempt to redress any imbalance in who can contribute. What was important for me was identifying that you cannot evaluate a programme or an idea in isolation and though what was learnt is fascinating it can only ever be partial.

The whole of Phase 3 I found fascinating and I think it presented us with lots more learning opportunities. Firstly, I had to re-evaluate what I meant by ‘success’. I think in the more ‘full-on’ participatory programmes ‘success’ looked like lots of different types of people taking part and getting actively involved. This often looked like a mass participatory event and I would question on reflection how deep the engagement always was. This is not a criticism of these programmes, I think people were engaging with the ideas that were being presented, and were having a fantastic time as they were doing so, completely challenging their perception of what a museum is or could be.

But Phase 3 immediately presented us with a different tone and offer. As there were no Associates, artists or ‘facilitators’ on the floor the invitation to come in and take part had to be made in other ways. So even though we did not get the high numbers of people that we had experienced before, the quality of conversations and engagement in the various activities presented – from the Schools and Teachers programme to Sarah Carne’s You are Welcome and through the frameworks, invitations and instructions provided – did not seem a barrier to some very deep engagement. We as a team experienced this in the quality of conversations we had with visitors, and the insight they shared by the comments and 3D creations that they left behind.

This Phase enabled the floor to become a reflective and engaging space, with people staying for long periods of time, often in family groups. Not having the artist/facilitator present did not seem a hindrance to people’s engagement once they had made the decision to come on to the floor.
The evaluation benefitted from a number of bespoke research projects, some of which we commissioned and some of which developed in consultation with researchers who were keen to focus on specific elements of Tate Exchange. For example, Hollie Mackenzie, a PhD student at the University of Kent, undertook a detailed study on Complaints Department Operated by Guerrilla Girls, while Maurice Carlin, a Clore Fellow, interrogated the changing perceptions of Tate Exchange held by Tate senior management. In addition, we commissioned the researcher Nicki Setterfield to conduct interviews with Associates to better understand what benefits, if any, Tate Exchange was bringing them in terms of, amongst other things, developing networks and leveraging funding. The Tate Digital team, working with Rebecca Sinker, Convenor, Digital Learning at Tate, also conducted a series of ‘deeper dive’ research projects with Associates to better understand how to promote deeper engagement with Tate Exchange digital audiences. At Tate Liverpool, Jessica Fairclough, Tate Exchange Co-ordinator, brought together the evidence collected over the life of the programme at Tate Liverpool in an overarching report. These different perspectives brought richness and a more granular understanding of key issues. The only challenge was ensuring that the findings found their way back to staff and Associates to ensure all could draw on the learning from them.
Based on our experience of evaluating Tate Exchange, if you are undertaking an evaluation of a participatory arts programme, with or without multiple stakeholders, you might like to consider the following:

**WORK WITH AN EXPERIENCED CRITICAL FRIEND/EVALUATOR WHO WILL OVERSEE THE PROGRAMME, PROVIDE SUPPORT AND ADVICE AND BRING CRITICAL DISTANCE AND AN OVERARCHING PERSPECTIVE TO THE ANALYSIS OF ALL THE VARIED DATA**

The entire evaluation process benefitted enormously from Hannah Wilmot’s contribution. Her role encompassed that of critical friend, facilitator, coach and mentor, while she also undertook ‘conventional’ evaluation tasks such as researching the case studies and bringing all the data together to write the final evaluation report. She was sufficiently detached from Tate Exchange to provide a critical perspective but close enough to support and inform the development of the programme throughout. If you only have a limited budget it is worth investing a significant amount of it hiring someone who can take on this hybrid role of critical friend/evaluator to collaborate with you on the evaluation – providing support, professional development and an external perspective – without delegating the whole process to them. This way, you learn through the process of evaluating and can embed it within your work.

**ENSURE ALL THOSE WHO WILL BE INVOLVED IN GATHERING AND ANALYSING DATA AS PART OF THE EVALUATION FULLY UNDERSTAND AND COMMIT TO A REFLECTIVE AND DEVELOPMENTAL PROCESS AS EARLY AS POSSIBLE AND MAINTAIN THAT COMMITMENT THROUGHOUT**

We recognised early on that it was very important that we stressed to staff and Associates the value and importance of evaluation as a reflective and analytical process intended to improve practice and act as an accountability mechanism. We were committed to an evaluation process that would help all of us learn and develop and saw it as integral to maintaining a practice that was of quality. We worked hard with all partners and programmers to communicate this and could see how beneficial it was when people committed to this process. Clarifying what and who the evaluation is for and how it can have a positive impact on how we work and the experience of those taking part helps to avoid the ‘evaluation as advocacy trap’ and contributes to rich and thoughtful practice. But it is important to remember that this process also provides valuable evidence that can be used to account for what has taken place to external stakeholders and for advocacy purposes.

**FACTOR IN REGULAR OPPORTUNITIES FOR GROUP REFLECTION AT EVERY STAGE AND WITH ALL STAKEHOLDERS, ASK REPEATEDLY, IF NEEDS BE: ‘WHAT ARE WE TRYING TO ACHIEVE AND CHANGE?’ AND ‘WHAT WILL SUCCESS LOOK LIKE?’**

To support this reflective and developmental process we found it incredibly helpful to provide time and opportunities for staff and Associates to come together and reflect on progress. Having a structure to these sessions is necessary. Creative exercises also help. We also learnt that it is important to feedback formative learning throughout to inform ongoing development and so that everyone knows that their contributions to the evaluation are being read, analysed and valued.

**EMPLOY MULTIPLE METHODS OF DATA COLLECTION TO CAPTURE THE COMPLEXITY OF THE EXPERIENCE AND TO BE ABLE TO TRIANGULATE FINDINGS**

Tate Exchange made abundantly clear to us how complex, multi-faceted, unstable and emergent any art practice that involves people participating really is. It was a challenge to find data collection methods that captured this authentically. Having observations, interviews, stories, quantitative data, films, photographs and audience feedback gave us a variety of perspectives that allowed us build up a rich picture of what was happening and how people were responding.

**RECOGNISE THAT THERE MAY BE A NEED TO PROVIDE CONTINUING PROFESSIONAL DEVELOPMENT (CPD) AND GUIDANCE TO THOSE UNFAMILIAR WITH AND/OR WHO LACK CONFIDENCE IN UNDERTAKING RIGOROUS EVALUATION**

Without question the evaluation process we have worked through in this first year of Tate Exchange has been time-consuming and daunting at times. We have tried to provide support for those who were unfamiliar or unconfident with the approach we were advocating, but we recognise that there is more to be done. However, we have witnessed how transformative it has been for some practitioners who acknowledge that their practice changed as a result of the help and advice they received and the opportunity they had to share and resolve problems with colleagues along the way.

Emily Pringle, Head of Learning Practice and Research, Tate
Luggage tag exercise, Associates day 2017. Associates' feedback on how they rated their event against the Tate Exchange objectives and values.
REFLECTIONS
MY APPROACH TO GATHERING THE MATERIALS
RITA EVANS, LEARNING RESEARCH ADMINISTRATOR

The evaluation materials for Tate Exchange were multidisciplinary and numerous. My task was to gather and collate these as well as investigate connections between them along the way. In my creative process as an artist I often find myself working with many different media and materials towards one piece. When developing a new work that is site specific, I will use research images, maquettes and drawings as talking points with a community of people local to the project, inviting them into the process and connecting it to their knowledge. This way, an image emerges that embodies their particular personal place and time. I also think about movement, how a structure formulated of all these images and thoughts might change physically over time – a live architecture. What excites me about this way of working is that although it is about relationships, it feels sculptural in the sense that it is malleable and hands-on.

To find my way through the Tate Exchange evaluation materials, my first thought was how to make an overall image of what an evolving process like the Tate Exchange evaluation might look like. I came up with several strategies to help navigate the quantity and type of materials. One strategy was to ask members of the Tate Exchange team their memories of working on Tate Exchange during Year 1, to use these as starting points for ways into the materials. I initially spoke to the staff who were observing on the floor, but this was also reflected in the writings, notes, TERE P Steering Group meeting minutes and archived emails that Tate Exchange staff contributed to each chapter. These threads took me on a journey I may not have taken on my own and allowed me to find overlooked materials along the way, bringing them into consideration.

To organise this I made a colour coded diagram with links to all the materials and made annotated notes directly on these. This kept a record of the whole collecting process within the chapters given by Emily Pringle and enabled me to note where all the materials were filed so we could return to them later if necessary, making it a malleable process. I also assembled the papers in different configurations to make non-linear connections and trails (see image). These materials were reviewed by Emily and her annotated notes added a further layer back into the constellation of pathways, perspectives and materials to create a sketchbook - messy, expansive and emergent.

All the Tate Exchange evaluation materials, Rita Evans, 2017. Photo © Rita Evans.

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