

# PRACTICE

IN  
LEARNING FROM  
THE EVALUATION  
OF TATE EXCHANGE  
YEAR ONE

# — EVENTS —

# EXPERI

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

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# FOREWORD

**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<sup>1</sup> 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!

<sup>1</sup> This will be available at:  
[www.tate.org.uk/research/research-centres/learning-research](http://www.tate.org.uk/research/research-centres/learning-research)



Bedfellows: *Sex Re-Education*, Tate Exchange 2016

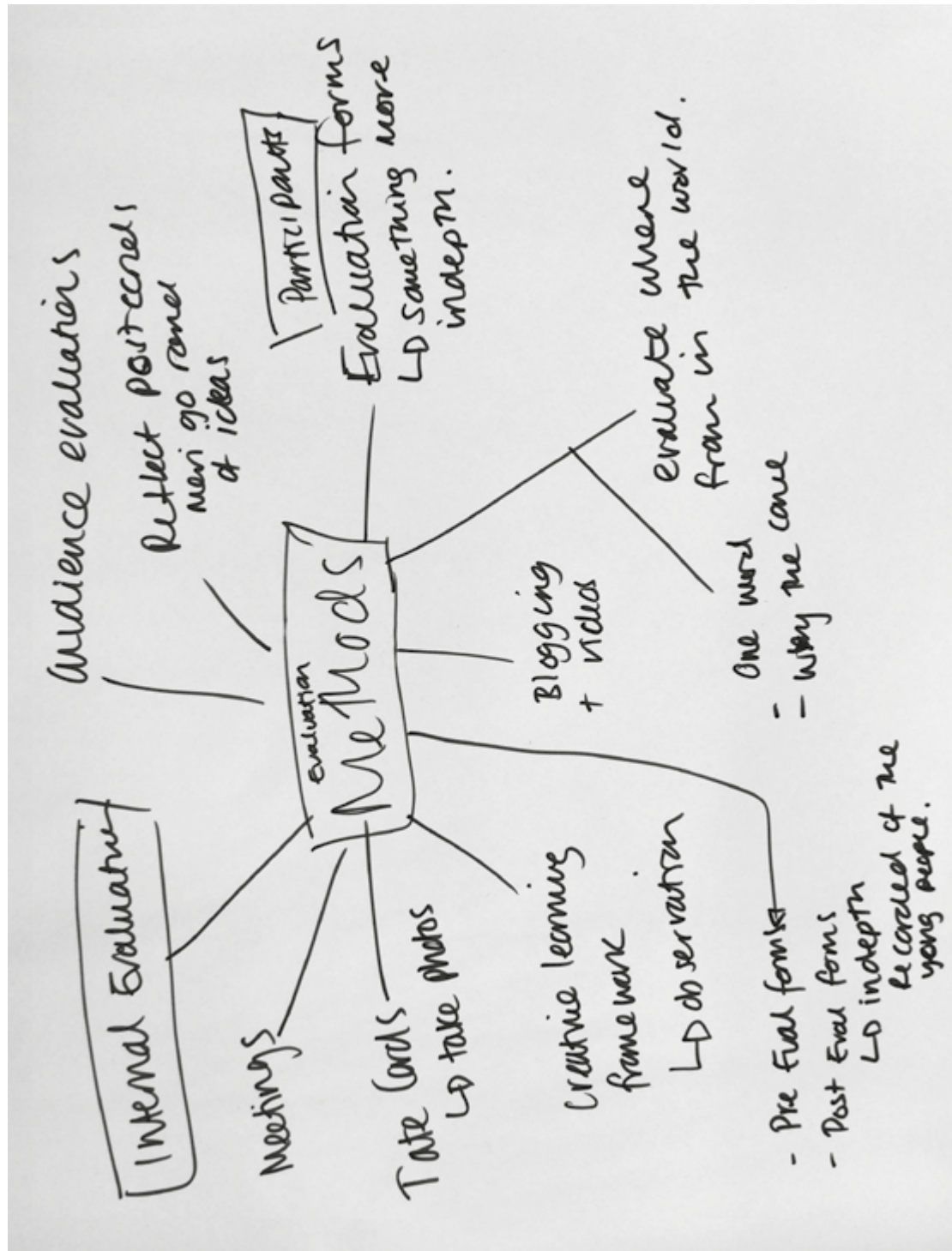
## In 2016/17, Tate Exchange comprised three phases:

- **Phase 1: Framing the Annual Provocation – September to December 2016**  
Tate Learning teams worked with a range of artists, theorists, facilitators and the public to explore the idea of exchange.
- **Phase 2: Expanding the Annual Provocation – January to April 2017**  
The programme continued through collaborations with external organisations (Tate Exchange Associates) who sit beyond the arts but who also work closely with the public in areas such as health and education.
- **Phase 3: Reflection and Dissemination – May to July 2017**  
The year culminated with opportunities to reflect further and share findings from the Tate Exchange Research and Evaluation Programme (TEREP).



# INTRODUCTION

EMILY PRINGLE, HEAD OF LEARNING PRACTICE AND RESEARCH, TATE



Associates brainstorming on evaluation methods. Associates day, Tate Exchange, 2017

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. TEREP thus provided an opportunity for us to share our knowledge and, importantly, to learn from others.

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<sup>2</sup>). 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 TEREP, 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, TEREP 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 TEREP 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 benefitted 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,<sup>3</sup> 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.

<sup>2</sup> G. Crossick and P. Kaszynska, 'Understanding the Value of Arts & Culture', *The AHRC Cultural Value Project*, Swindon, AHRC, 2016, <http://www.ahrc.ac.uk/documents/publications/cultural-value-project-final-report/>, accessed 26 October 2017.

<sup>3</sup> S. Kushner, *Personalising Evaluation*, London, Sage, 2000.

'THIS IS FAR TOO DIFFICULT FOR ARSY ATTITUDES!'

Quote from a staff member during an evaluation forum

# 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 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 the 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 TEREP to 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 TEREP 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.

Details of the TEREP 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 learnings 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.

*Key questions to float material around*

The following 3 strands for the research and evaluation project have been agreed:

- Evaluation: capturing experience of the participants & institutional changes. 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

Minutes from the TEREP Steering group, 24 October, outlining the rationale and priorities for the evaluation



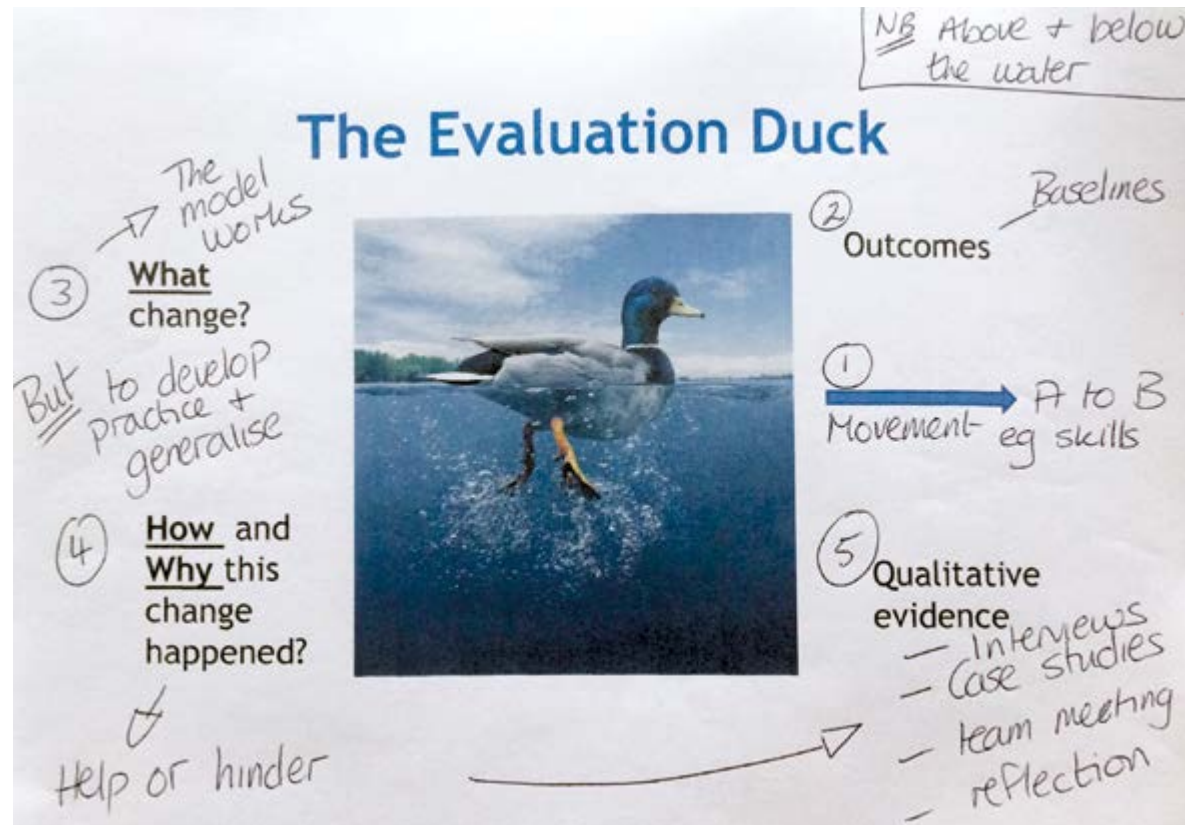
## REFLECTIONS

### 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!



The Evaluation Duck, Kieron Kirkland from the Nominet Trust with handwritten notes by Hannah Wilmot

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 Sphere 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 Clore 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.

Extract from The Tate Exchange Year 1 Evaluation Report that lists all the sources of data we gathered during the evaluation process

# 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 TEREK 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

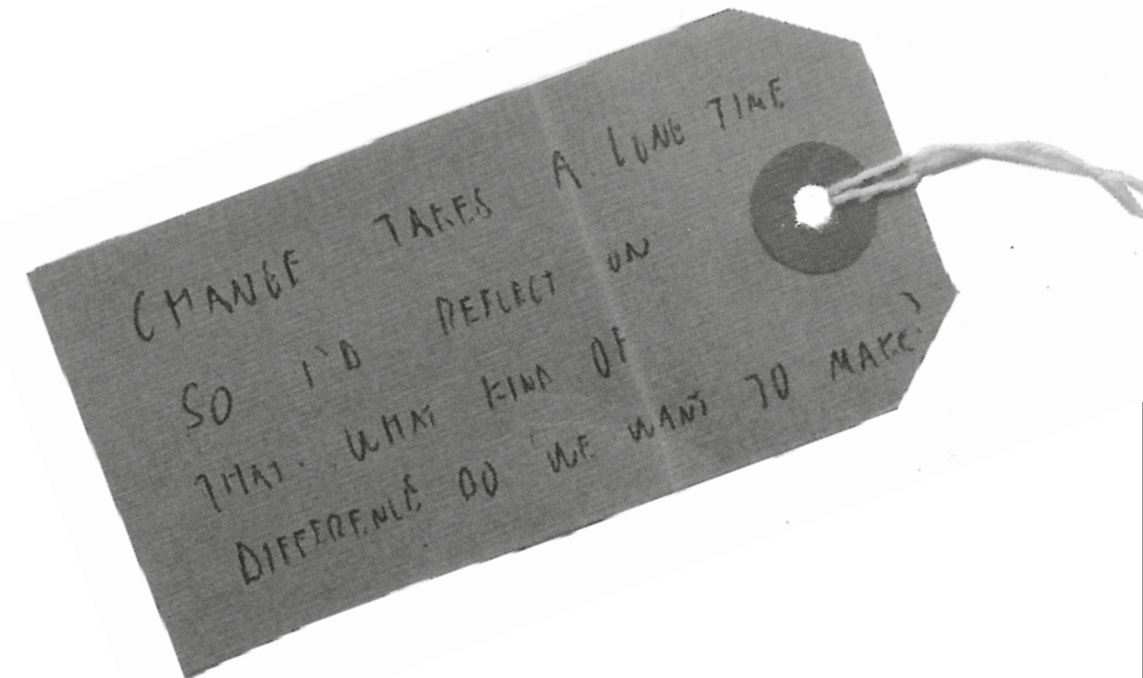
1. The timeframe for putting the evaluation framework together was too short. Ideally there would have been more consultation with the users, but this was not possible.
2. Enabling those involved with the programming to step back and evaluate was difficult at times. This was mainly due to time constraints, 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.

## Phase 2 Emerging Findings – TEx Digital

### Twitter:

- Stronger sense of ownership of TEx digital spaces by Associates
- Associates are mentioning each others' programmes, responding to each other and involving the public
- There's a greater sense of TEx being a 'bigger thing'
- Highly diverse Associate-generated content: photos, quotes, GIFs, artist-led video tours, audio snippets and more
- Content tells a story of what's going on in the space as it's happening
- Engagement tripled in Phase 2 vs Phase 1 in terms of likes, shares and reposts
- There were times when over 100 Twitter notifications came in per day
- Multiple voices are being acknowledged and made visible by @TateExchange, which is otherwise not possible via @Tate

Extract from the 'Phase 2 Emerging Findings' document produced by Tate Digital illustrating the type of information that was shared with staff and Associates as the programme developed



Luggage tag feedback exercise with Associates on the Tate Exchange values



# 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](http://www.tate.org.uk/download/file/fid/30243)) and the value of having expert colleagues to meet with. We set up the TEREP 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 TEREP 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 TEREP 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 TEREP
- Making recommendations for the ongoing development of TEREP
- Advising on the dissemination of TEREP findings

The group will meet three times between September 2016 and July 2017.

Extract from the TEREP Steering group Terms of Reference document, detailing the makeup and purpose of the Group

TENT x Tate, feedback wall, Tate Exchange 2016



Learnings & the role of the Steering Group:  
SM noted that we should consider the role of the Steering group, which is to support the Evaluation team in telling the story of the journey of how the organisation is attempting to do something different, how this is being achieved, and what it is that we are trying to measure.  
EP commented that we are trying to gain a greater understanding of the effect the programme has on the institution, associate organisations and the members of the public who take part (either purposefully or by chance). The emphasis should be on the learnings and developing practice. These should also feed into the TEx values: openness, generosity and risk, rather than accountability.  
NB asked how we will be handling the learnings for the institution and whether the framework is achievable in year 1.  
EP suggested that this is something that the Steering Group can reflect on. Is it possible to do all the things we are setting out to do? We are testing out the process and will need the Learning teams and the associates to feedback on whether our approach has worked, and if it is something that we should continue with. We can then better understand how we choose to use the framework and it may prompt a series of questions we wouldn't have considered. There may be evidence that makes the case for not having a framework.  
HH added that it was explicit that the TEx evaluation is an experiment and it is part of the enquiry. We need to see how the teams are completing the evaluation documents, but we do also need to explore how to make the values more explicit.

*contrast as gone along.*

Minutes from the TEREP Steering group meeting, 24 October 2016

## Reflexive and Creative Approach of TEx Evaluation:

- JS: PHF interested in what we're learning, but also very interested in how we learn and what we're learning about evaluation methods as well as helping people in the institution.
- EP: Experimental nature of TEx programme is reflected in evaluation. For the evaluation to authentically respond to a programme like TEx, the process of gathering all these impressions, becomes creative in itself. Need to articulate the value of experimental.
- HH: Not monitoring exercise, it's about finding language to nuance this.
- HW: Have been suggesting ways evaluation is embedded in programming. Has been useful for Public Programme Curators to integrate evaluation in their planning. TEx affords them a different approach to public, normally working on ticketing / marketing model.

Minutes from the TEREP Steering group meeting, 13 April 2016



# THE EVALUATION FRAMEWORK

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 as detailed in the framework 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.

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 so 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

Extract from Hannah Wilmot Evaluation Guidance Notes, that accompanied the valuation framework and were shared with staff and Associates.

### Undertaking your evaluation

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#### For example

TEx Indicator of Success	Associate Indicator of Success	Evaluation Methods	When/Who?
Participants develop knowledge, understanding, inclination to action on issues discussed.	Participants explore notions of 'family' and understand the value of reciprocal support in 'families'.		

- **Planning data collection** - Think about what evidence you will need to tell you whether you have been successful and the best way to collect this evidence. Also, think about when you need to collect this evidence and decide who will gather the evidence. In longer projects, you may want to find out participants' starting points so you can track any changes.
- **NB Be realistic about what is manageable.** Better to focus on a small number of outcomes and gather consistent data for these.

#### For example

TEx Indicator of Success	Associate Indicator of Success	Evaluation methods	When/Who?
Participants develop knowledge, understanding, inclination to action on issues discussed.	Participants explore notions of 'family' and understand the value of reciprocal support in 'families'.	- Observation of engagement in activity. - Photographic documentation of mind maps and artwork produced. - Post-it notes 'A promise to my family.'	All team during and post-event team reflection.

**Analysing your data** - After the event, you need to make sense of your evidence. Have you met your objectives? If not, do you know why? Did anything unexpected happen? What have you learnt and how could you use this learning in the future?

- o Try to establish the majority view.
- o Look for unexpected outcomes.
- o Don't ignore negative comments or images!
- o But, avoid being influenced by a tiny number of very positive or negative views.
- o Check that your judgements are backed up by evidence from a range of people e.g. participants, members of your team and the artist.

**Sharing and reporting** - For Tate Exchange, we ask you to share your evaluation with us by completing a brief Event Report. We are really keen to find out what you and your participants learnt from your experiences; what new ideas, perspectives, practices and products Tate Exchange is facilitating; and any new questions the work has provoked.



This is the version of the evaluation framework that was shared with Learning staff that includes the prompts for specific Indicators of Success specific to their events.

Customised evaluation framework notes by the Learning curator of Emergent Landscapes, with Rob St John, Tate Exchange 2016

Rob St John

I consider what the role of art might be in relation to people's lives and through that to society more widely.

Event:	TEx Indicators of Success (How will we know if we have achieved our objectives? What will success look like?)	Your Indicators of Success (What specific things are you looking for, to tell you if your event has been successful?)	Evidence/Evaluation Methods (What evidence do we need and how will you collect this evidence?)	When/who? will collect evidence?
Publicities has tribute pieces of	100,000 participants in Y1 (55,000 online; 45,000 in gallery) 35% participants new to Tate % (TBC) diverse audience groups	General public & intergenerational by families or group of students.	Audience numbers and demographics (submitted in Event Report) Web and social media analytics Postcodes for gallery audience e.g. through Eventbrite	Learning staff - for ticketed events (Plus: VE staff, Marketing, Tate Digital, Sphere Insights) that people get down to opp
new	Participation at local, national and international levels The programme includes varied and innovative opportunities for participants to explore a wide range of socially relevant issues. The programme includes varied and innovative approaches (including digital) to engaging with art and ideas. Participants report positive personal outcomes (cognitive, social, emotional, their engagement	to consider Tate as a cultural/social + ecological site in itself - 2 practical acts - 2 poss talks - space will explore Marriage of sand as imp in space as stake	Event Report - provides details about the focus of your event and what was new about the approach taken Interviews, questionnaires, participatory evaluation e.g. post-it notes, reflective conversations etc	Learning staff - end of event Learning staff - before, during and/or at end of event (Plus: Tate Digital)

### Tate Exchange: Evaluation Framework - Tate Learning Staff

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

**Aim of your programme/event:**

Tate Exchange Objectives (What are we trying to achieve or change?)	TEx Indicators of Success (How will we know if we have achieved our objectives? What will success look like?)	Your Indicators of Success (What specific things are you looking for, to tell you if your event has been successful?)	Evidence/Evaluation Methods (What evidence do we need and how will we collect this evidence?)	When/who? will collect evidence?
To create a common space (actual and virtual) for local, national and international public debate in which diverse voices and views generate new ideas and perspectives that contribute to cultural and societal issues of our time.	100,000 participants in Y1 (55,000 online; 45,000 in gallery) 35% participants new to Tate % (TBC) diverse audience groups	Who is your target audience?	Audience numbers and demographics (submitted in Event Report) Web and social media analytics Postcodes for gallery audience e.g. through Eventbrite	Learning staff - for ticketed events (Plus: VE staff, Marketing, Tate Digital, Sphere Insights)
	Participation at local, national and international levels	What ideas and issues are you planning to explore?	Event Report - provides details about the focus of your event and what was new about the approach taken for artists and Tate. (Reflections against original intentions and unplanned outcomes).	Learning staff - end of event
To engender a deeper relationship with art for a broader public through new partnerships and approaches to engagement with art, ideas and through new social opportunities.	The programme includes varied and innovative approaches (including digital) to engaging with art and ideas.	What new approaches or opportunities does your event offer? How will you know if this approach has been successful?	Interviews, questionnaires, participatory evaluation e.g. post-it notes, reflective conversations etc	Learning staff - before, during and/or at end of event
	Participants report positive personal outcomes (cognitive, social, emotional, wellbeing, creative) from their engagement in TEx.	How do you hope participants will benefit?		

	Participants report new or changed perceptions of art, Tate and/or art institutions.	Are there specific perceptions you are trying to change? How will you know if you've been successful?	Social media comment	(Plus: Tate Digital)
	Participants report desire for further participation and/or intention for return visit to TEx	Are you offering participants other opportunities?	Observation in gallery	Learning staff - during
	Members of general public engage for extended periods with art and ideas in TEx events.	Do you have an expectation around audience engagement? Will people be transient, passive observers or do you want people to participate in an activity?	Web analytics (tracking TEx user journeys compared to e.g. What's On user journeys)	(Plus: Tate digital and VE staff)
	Learning from TEx supports and informs organisational development at Tate e.g. in approaches to partnership working, professional development for staff, working with artists etc.	How does this event relate to the wider objectives of your team? Do aspects of this work break new ground for your team?	Event Report - provides reflections on professional development for individual team members and other team and organisational outcomes.	Learning staff - end of event
To provide open and accessible cultural educational opportunities for all publics, with a particular focus on young people.	40% TEx users (online and in gallery) are under 25 years	Is your event targeting young people and/or will it be of interest to young people?	Audience demographics (submitted in Event Report) using audience surveys, photographic documentation, observation, Eventbrite	Learning staff - before and at events
To give participants an opportunity to contribute ideas by providing a platform and new networks reaching the broader cultural sector and generating practices, products and processes that can make a difference to culture and to society more broadly.	Participants feel their ideas and views are valued.	What opportunities/spaces are you creating for participants to contribute?	Observation, interviews, questionnaires, group discussion, participatory evaluation e.g. post-it notes	Learning staff - before, during and/or at end of event
	Participants develop knowledge, understanding, inclination to action on issues discussed.	How do you hope participants will respond to or benefit from your event?	Social media comment	(Plus Tate digital)
	Artists report positive legacy from TEx in how they work and/or who they work with.	Do the artists have specific areas of enquiry?	Event Report - includes reflections from artist(s) during the project and at debrief.	Learning staff/artists - before, during and/or end.
Do you have an additional, specific objective for your TEx event?				

Hannah Wilmot, 17.10.19

Feedback from the group on evaluation documents:

HN & JW brought up the potential issue of the frameworks restricting the practice in terms of the indicators of success. HN questioned some of the language in the indicators of success, specifically the use of 'positive outcomes'. She felt this could be problematic as art does not need to engender positivity. She suggested that the aims may need to be clearer, e.g. making the following explicit:

- What are the big ideas?
- What is the exercise?
- How is it engaging people?
- Do the TEx values need to be made clearer?

JW added that we need to consider whether these frameworks will cause the curators shape their events around the criteria.

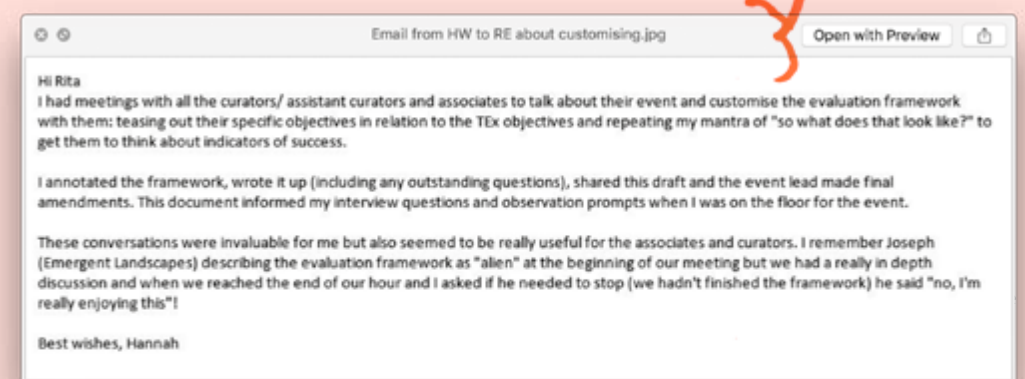
BS commented that due to the scale of the project, the expectation of thought and complexity are very high. The outcomes need to be addressing what questions we should be asking.

EP commented that there is a difference between research and evaluation and that we have a responsibility to examine and account for experience in relation to Tate Exchange aims and objectives. She suggested that the evaluation documents be left as they are for now, but HN will add an intro paragraph to the Event Report to reinforce messaging that the guidelines are not prerequisites and can be used and adapted as necessary to suit the individual events. We will revisit and review the documents in Phase 3.

HN suggested that in year 2 we could/should include the criteria from the evaluation documents in the invites for prospective associates.

Minutes from TERE Steering group meeting, 24 October 2016, detailing their views on an early draft of the evaluation framework

Email from Hannah Wilmot outlining her approach to supporting Learning staff and Associates to adapt and embed the evaluation



# THE EVENT REPORTS

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.

Tate Exchange event report pro forma. Developed by the Tate Exchange team and Hannah Wilmot and sent to staff and Associates

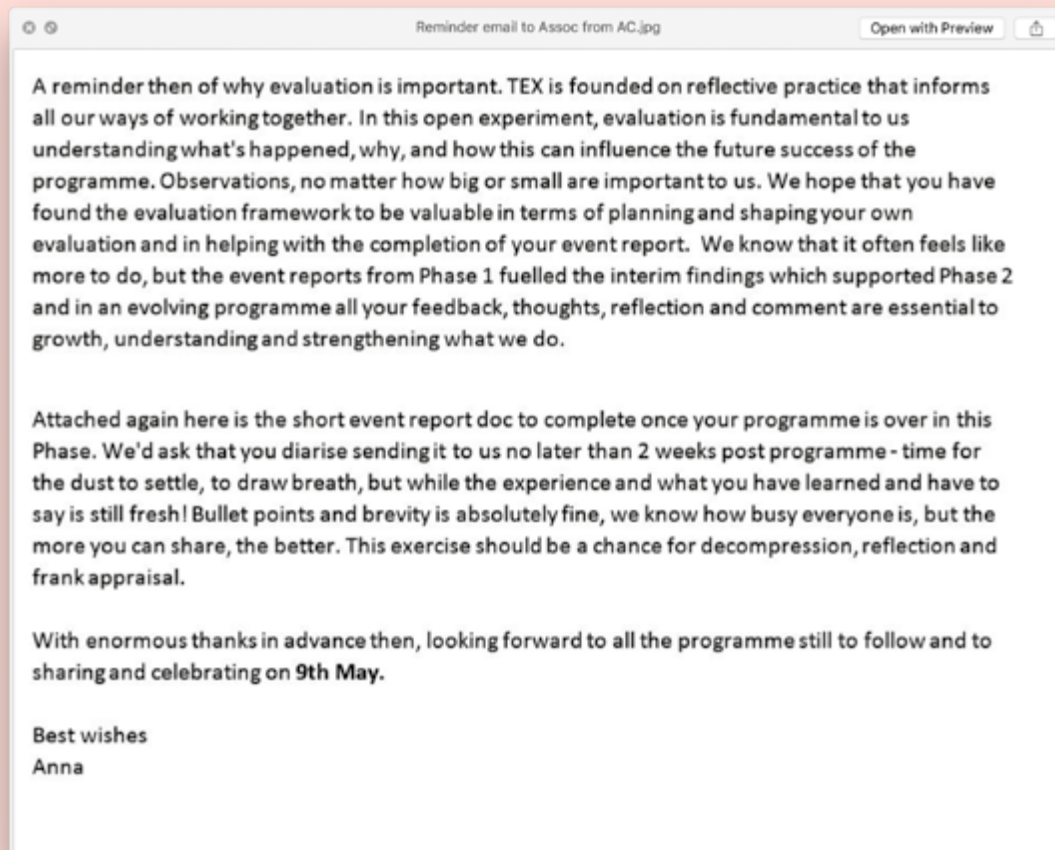
## TATE EXCHANGE: EVENT REPORT

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.

<b>1. Event title</b>
<b>2. Lead artist(s), partners and coordinators</b>
<b>3. Event aim: What's the big idea?</b>
<b>4. TEx context:</b> 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?

<b>5. Event description:</b> 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.
<b>6. Target audience</b>
<b>7. Numbers involved in putting the work together</b>
<b>8. Attendance numbers:</b> In the space and online.
<b>9. Comments on the space:</b> How it worked and why (or why not).
<b>10. Evaluation of participant experience, planned and unplanned outcomes:</b> 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)
<b>11. Outcomes for you:</b> e.g. What did TEx enable you to explore? What have you learnt? Will this support or change how you work in the future?
<b>12. Outcomes for the Artist(s):</b> 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?
<b>13. What was problematic and why?</b> What would you do differently?
<b>14. Project documentation, archiving and legacy:</b> e.g. Does the project have a future life? Has it been a catalyst? Is work being archived? Will you share findings with others?
<b>15. Key learnings for TEx:</b> 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)
<b>16. Identify 3 key photographs:</b> Please supply direct hyperlinks for each image from your event's image folder on T Drive.
<b>17. Identify 3 key social media posts:</b> Please copy and paste the direct links.
<b>18. Details of online content produced for the project</b>
<b>19. Any new questions the event has provoked</b>

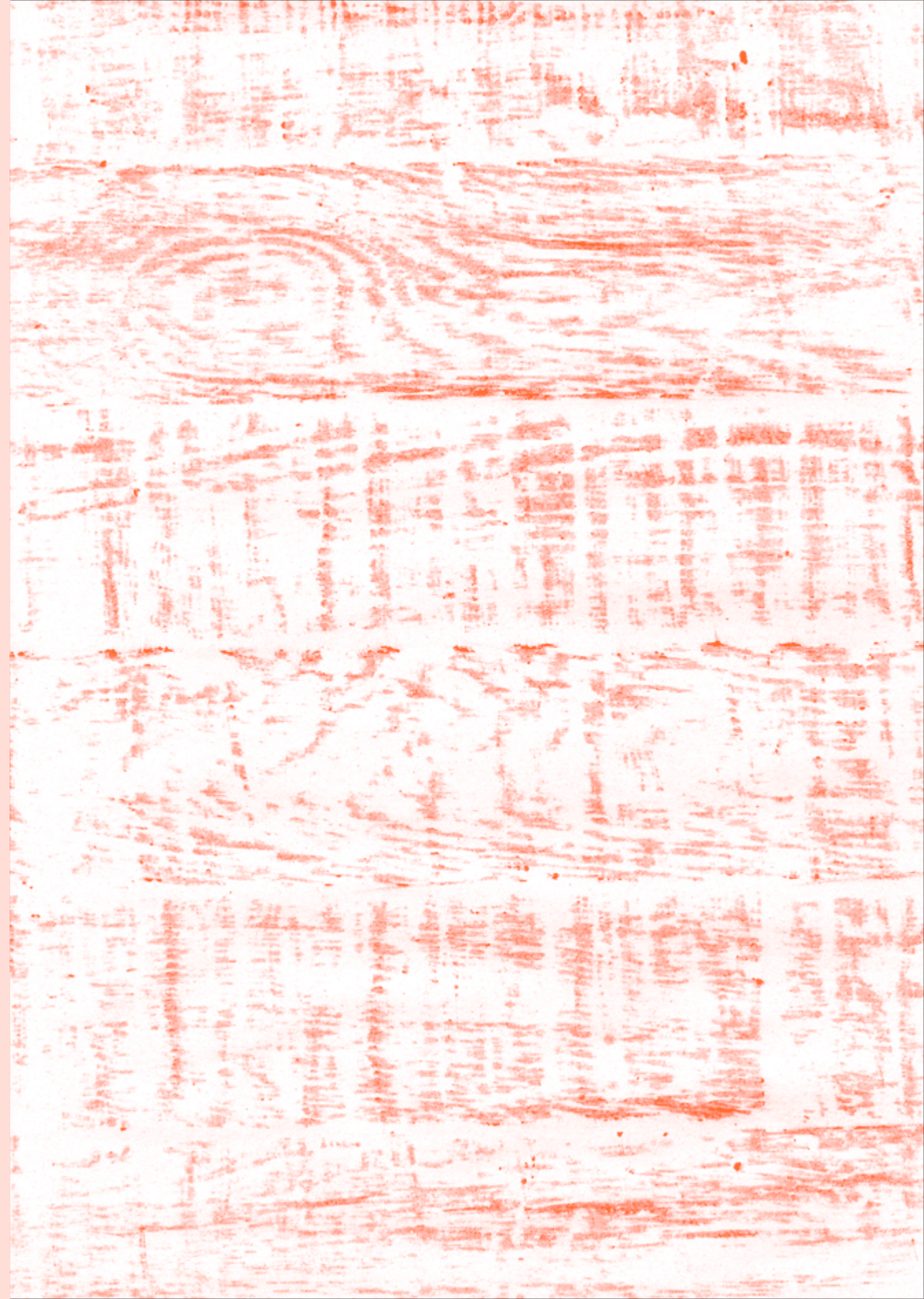




Email prompt from Anna Cutler, Director of Learning, Tate, to Associates encouraging them to complete the event reports

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





# EVALUATION FORUMS

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.

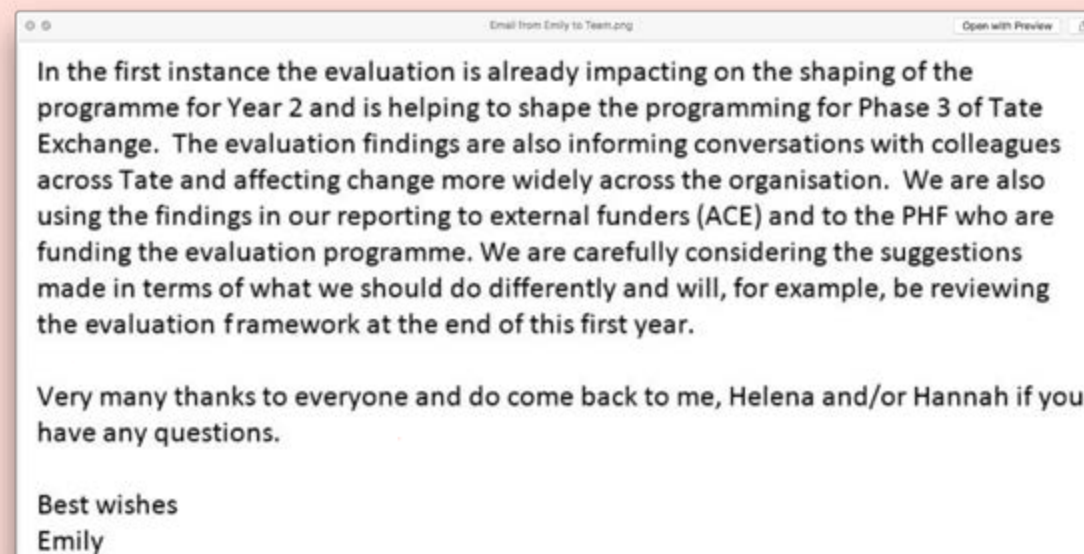
Phase 2 Learning team evaluation forum



Feedback Post-it from Phase 1 Learning team evaluation forum

• This meeting has been really useful!

Email from Emily Pringle to the Learning team summarising the Phase 1 Learning team evaluation forum





# STORYTELLING

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 TEREPE 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).

The moment at the end of the performance by Rashida Bumbray and Simone Leigh when the young flute player burst into tears. It felt like more than one person's emotional response to the event; it symbolised a collective feeling that we'd all been part of something extraordinary - the artists, the musicians, Tate staff and the audience who had walked up 5 flights of stairs in the Switch House following and **creating** a procession. The tears acknowledged that this was a project that had spoken with urgency and eloquence to a wide range of people and it felt like something vital was at stake. (2, 4, 5, 7, 8, 9, 10, 11, 13, 14, 15).

Story relayed by a member of Tate staff, Phase 1 Learning team forum



Aluminium with Rashida Bumbray and Simone Leigh, performance at Tate Exchange 2016, photo GBPhotos.com

I was standing on the floor near the entrance on the first day of the **Rags** programme. Anna was starting to tape up the space - there was some tape already criss-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 up 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 extricating 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 through at one stage his father urged him to do so, as they wanted to leave the room. Then, at a key moment, he had obviously realised his design and stood up. Having shown it to his parents, he left. (1, 2, 3, 7, 9).

Story relayed by a member of Tate staff, Phase 1 Learning team forum

## 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 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



IN OCTOBER, THE GUERRILLA GIRLS INVITED THE PUBLIC TO...

POST THEIR COMPLAINTS

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

... BUT WHAT WAS MOST EXCITING TO ME WAS THE SHEER NUMBER OF YOUNG WOMEN SHARING + CELEBRATING EMPOWERED FEMALE ARTISTS ACROSS SOCIAL (👍❤️📱) EMOTIS AND ALL.

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

Storytelling image by Learning team at Phase 1 Learning team forum

**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...?

Extract from the 'Phase 1 Learning team evaluation forum schedule', the 'storytelling' exercise, drafted by Hannah Wilmot

HW to RE on storytelling.jpg Open with Preview

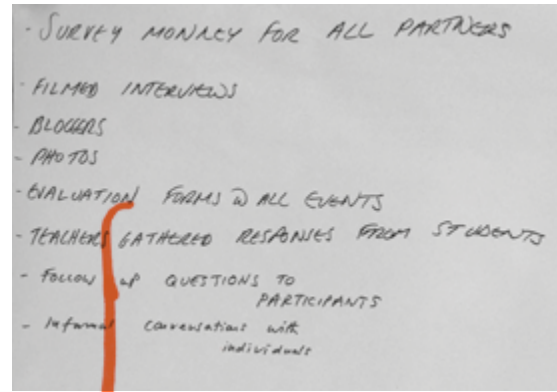
I wish I'd taken photos of people writing their stories during the first evaluation forum as this was significant for me - I used storytelling as I'd identified a gap in the event reports from Phase 1 relating to outcomes for participants. I knew Learning staff had 'anecdotes' and I wanted to gather 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



# EVALUATION FORUMS (2)

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.



Feedback from Associates day

#### 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 TEREPA Steering group meeting, 13 June 2017, giving an update on Associates day by Hannah Wilmot



Tweet from Associates day

### 3 TEx learning and change (10 mins)

From your experience (your own event and other events you participated in), to what extent has TEx achieved its objectives so far?

- For each objective
  - Write a score out of 10 on a luggage tag
  - What could you/we/Tate do to increase that score? (on reverse of tag)
  - Pin the tag onto the line for each objective (each done large-scale on a board)

e.g.

**To engender a deeper relationship with art for a broader public through new partnerships and approaches to engagement with art, ideas and through new social opportunities.**

1						10
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Extract from 'Evaluation Schedule for the Associates day' outlining one of the evaluative exercises, drafted by Hannah Wilmot



Associates day evaluative exercise

#### 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.

Event: **AND inclusive**

<p>What difference did your event make to the participants/audience?</p> <ul style="list-style-type: none"> <li>More new people (People)</li> <li>Thinking about Year 2, have links (Teachers)</li> <li>New Objectives (Public)</li> <li>Disability embedded in all work (Cultural Sector)</li> </ul>	<p>What evidence do you have to support this?</p> <ul style="list-style-type: none"> <li>1st school trip (safe space) - enjoyed! inc going to gallery</li> <li>brought networks together</li> <li>built confidence</li> <li>chance to show case work</li> <li>Interaction + exchange thru sharing space</li> <li>Considering disabled access/have the building consulted!</li> <li>Disability awareness training to new direction staff</li> </ul>
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- Survey Monkey for each org
- Teachers get responses from students
- Filmed interviews
- Tracking learning on building + access reification
- Photos
- Bloggers
- Evaluation forms for all events.

Feedback from the Associates day as part of an exercise devised by Hannah Wilmot that invited Associates to reflect on the difference their event made to participants and detail the evidence they had to support this.



# 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.

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

	A	B	C	D	E	F	G	H	I	J
	Date	Comments Section	Type of comment	Quote	Department	Full heading	Response details	Staff Name	Action	Programme
1	01/06/2017	Comments Card	Positive	You are welcome! got our family talking about what art could be beyond painting and drawing. I am not an artist or even arty but the whole idea of the workshop has made me realise how integral art is to my life.	Learning	Tate Exchange				You Are Welcome
2	01/06/2017	Comments Card	Positive	Kids enjoyed the activities we had a great visit	Learning	Tate Exchange		E		You Are Welcome
4	01/06/2017	Comments Card	Positive	It was great everyone had some fun We grandparents were feeling a bit stressed with our grandchildren Harry 6 and Emma 4 we were devoted to the 3rd floor and had an wonderful peaceful hour with very helpful staff who settle the children in then gave us a cup of tea. The children who had been with each other and collaborating enjoyed making a house of the future together. thank you Tate and staff.	Learning	Tate Exchange		E		You Are Welcome
5	01/06/2017	Comments Card	Positive	We had fun here. The staff are very friendly and helpful. The facilities here are superb. Will definitely recommend friends to visit. Thank you.	Learning	Tate Exchange				You Are Welcome
6		Comments Card	Positive	This is a wonderful art gallery. All the art work here outstanding and awesome. This is my best place for late modern. I can't believe how spectacular all these art works look when there stuck up on the wall.	Learning	Tate Exchange				You Are Welcome
7	01/06/2017	Comments Card	Positive		Learning	Tate Exchange		E		You Are Welcome

Please write your comments below

I've very much enjoyed my activity in Exchange - my only chance probably to exhibit in the Tate. I'd love to know how the project progresses and would appreciate a follow up media link.

Probably not your fault but I even as a Tate member I haven't been fully aware of 'Exchange' - could be because I live in S. Wales.

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

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

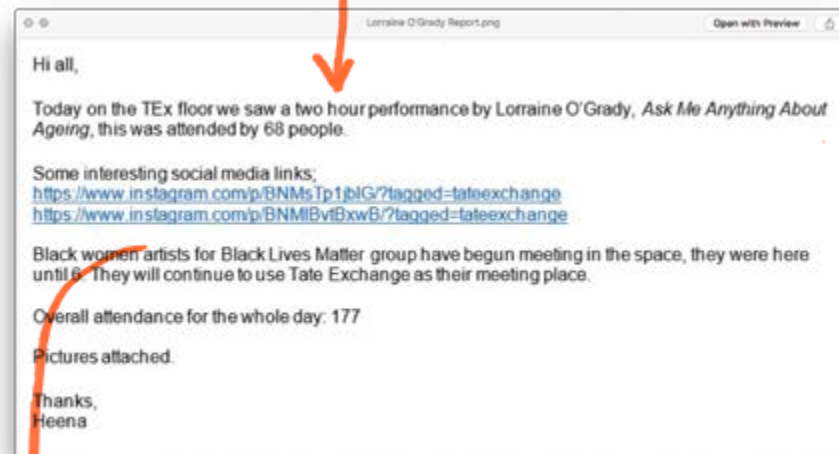




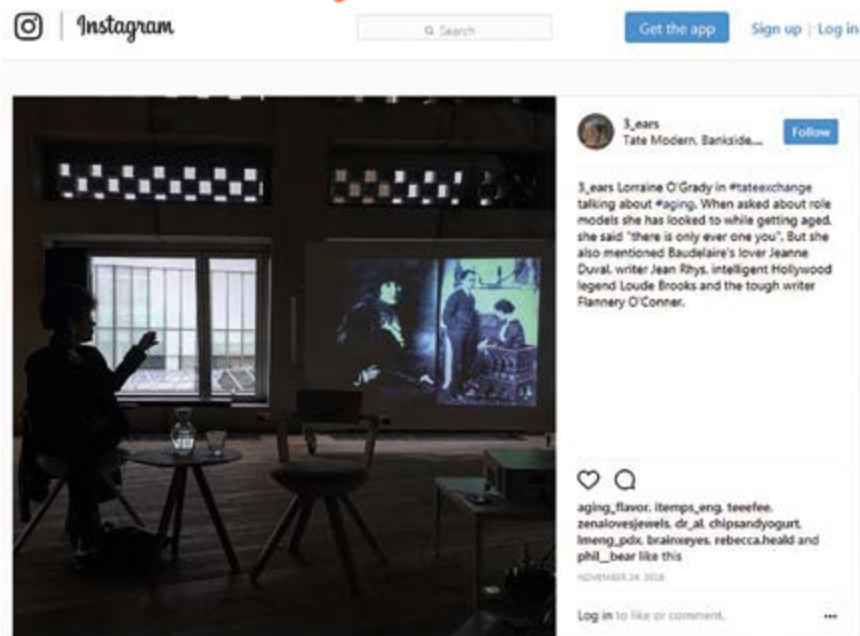
# THE DAILY REPORTS

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.



Daily report by Heena circulated via email, for Lorraine O'Grady *Ask Me Anything About Ageing*, Tate Exchange 2016



Instagram post linked to in Heena's daily report, for Lorraine O'Grady *Ask Me Anything About Ageing*, Tate Exchange 2016

Extract from Nicki Setterfield's analysis of all 77 daily reports

## Tate Exchange Daily Update Evaluation

77 daily reports read

**Dwell Times**  
(a) longer than 30min  
6 examples

(b) over one hour  
23 examples

**Evidence of intergenerational learning**  
15 examples

**New engagements with other people in the space**  
6 examples

**Changed perceptions of Tate**  
1 example - "Bloody brilliant. An unexpected treat which my children love."

**Energy levels/atmosphere**  
(a) busy or 'buzzy'  
15 examples

(b) quiet and contemplative  
20 examples

**Types of activity**  
(a) making  
38 examples

(b) talking  
34 examples

(c) listening  
9 examples

(d) other  
44 examples

**How people have found the space**  
(a) stumbled across it  
19 examples

(b) came for a specific event  
17 examples

(c) other  
6 examples

**Multinational**  
34 examples

**Inclusivity**  
10 examples

**Challenges**  
7 examples

### Evidence of intergenerational learning

10 year old boy participating with parents and grandfather  
A German man who went to get his family from the gallery because he thought it was unmissable  
Huge range of ages and abilities  
Group of students joined by a man in twenties  
Woman with 5 year old son  
Group were mixed age (9-54)  
Two families, one is local and been several times before but bought another family with her this time as her own children like it so much

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.

These guidance notes were provided by Jane Wells, Tate Exchange Programme Manager, for colleagues from Visitor Experience, who were working on the Tate Exchange floor at Tate Modern and who were tasked with writing the daily reports

## REFLECTIONS

### THE EXPERIENCE OF WRITING THE DAILY REPORTS

LAURENCE VAN DER NOORDAA,  
TATE EXCHANGE ASSISTANT

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 while 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.

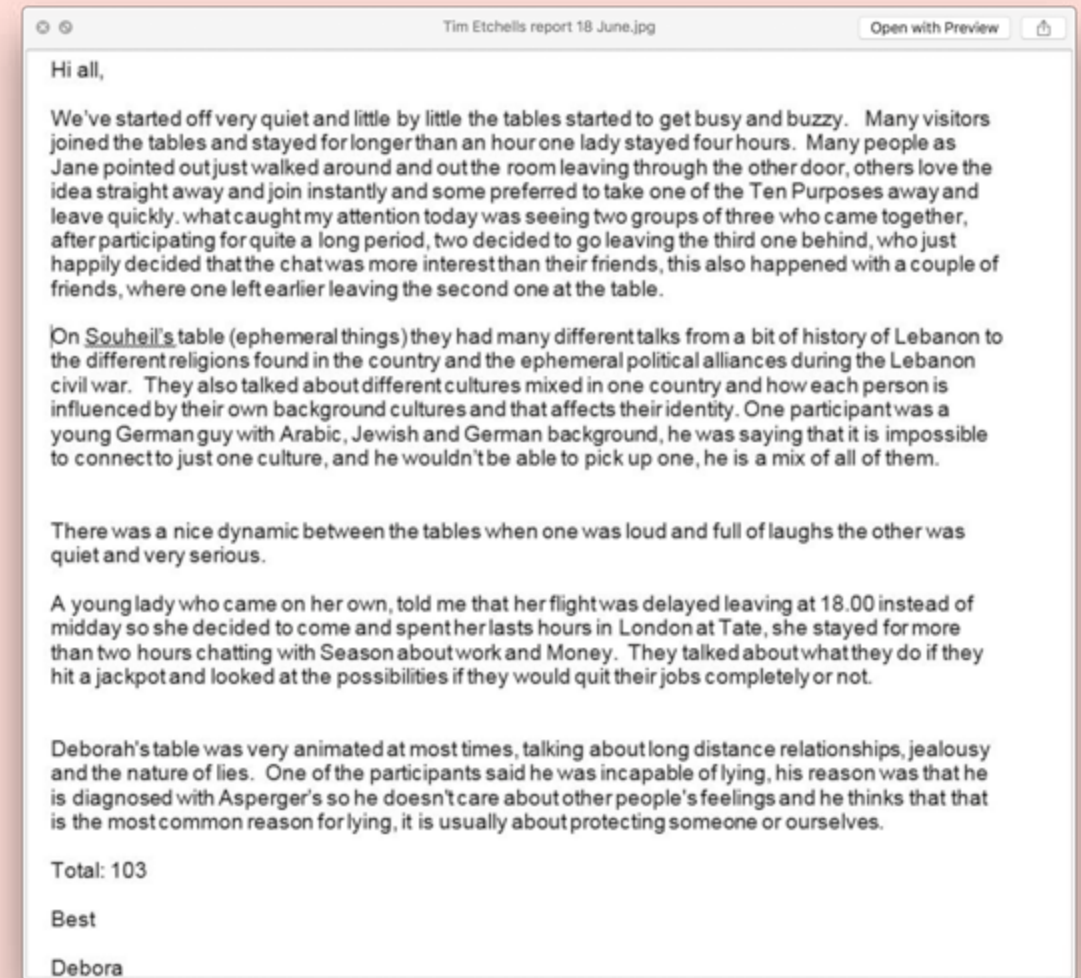
It is also a great tool to go back to. There is so much going on at Tate Exchange, days can merge into each other and you forget what the programmes were. With the updates you can go back to a day you worked and remember it all, as you might with a diary of your life.

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.

Laurence as  
active-observer



Daily report, 18 June 2017, for Tim Etchells *Three Tables*, Tate Exchange 2017



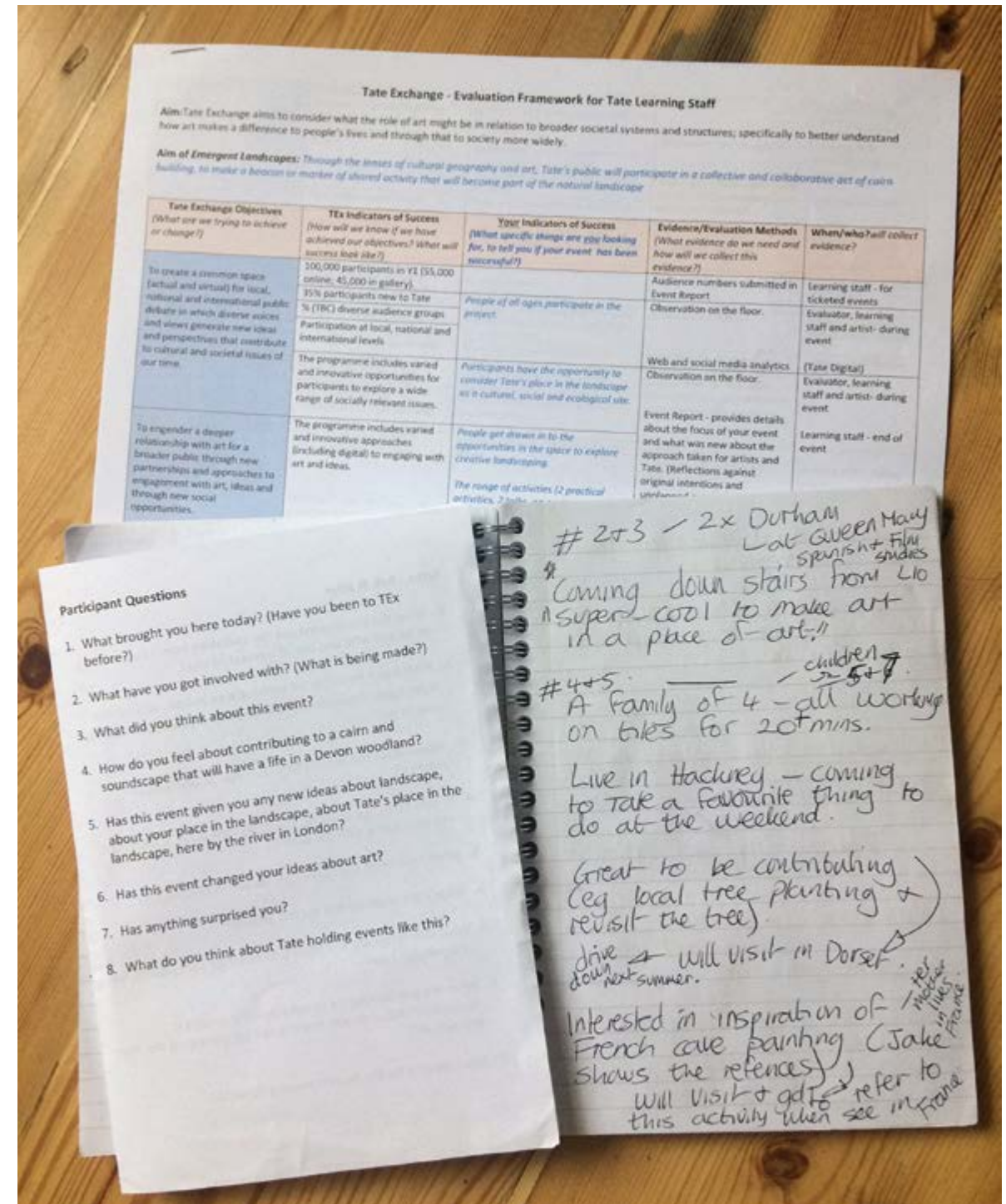
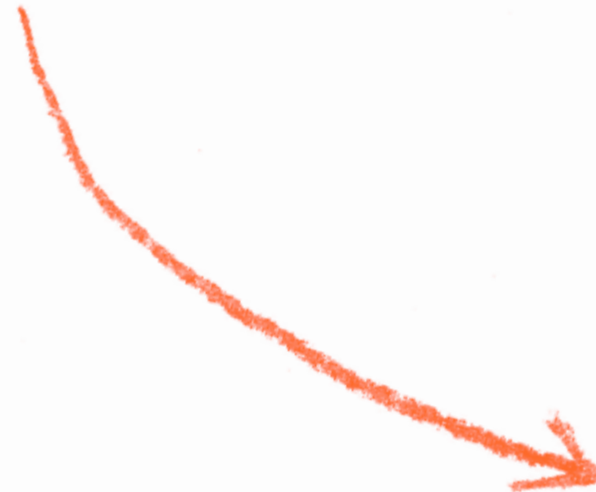
Laurence Van Der Noordaa observing a session during Emma Smith with Art on the Underground Communications Department, Tate Exchange 2017



# CASE STUDIES

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.



Hannah Wilmot's case study notes

# QUANTITATIVE RESEARCH

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 audience's experiences, with variable results.

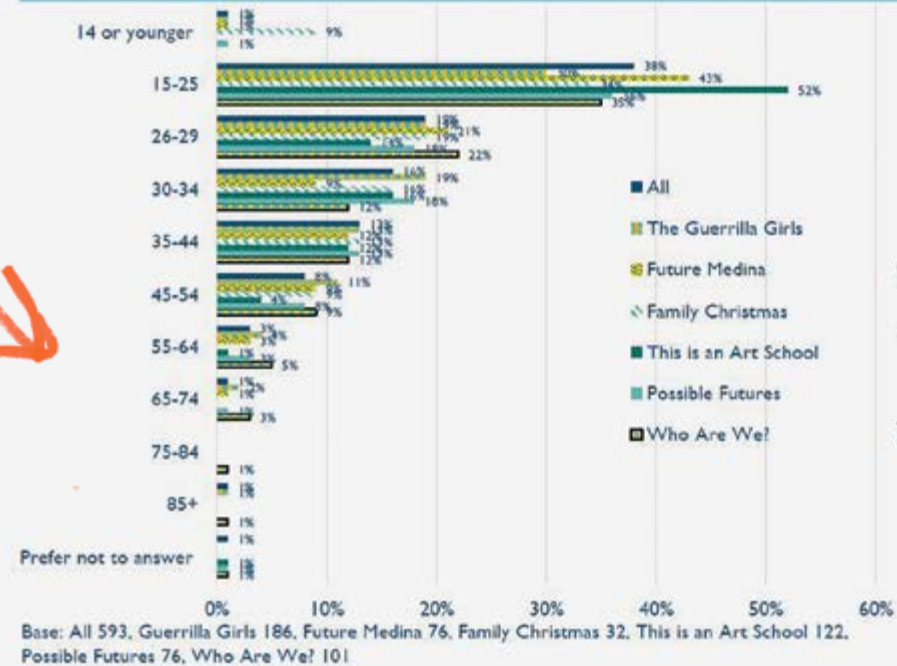


Complaints Department Operated by Guerrilla Girls, Tate Exchange 2016

## Research Methodology

- Quantitative results are based on 593 surveys completed by members of the audiences of the following events:
  - Complaints Department Operated by The Guerrilla Girls 4 - 9 October '16
  - Future Medina 16 - 19 November '16
  - Christmas Family Programme 23 December '16 - 8 January '17
  - This is an Art School 9 - 15 January '17
  - Possible Futures 4,10,11 February, 10,11 March '17
  - Who are We? 14 - 19 March '17
- Respondents were randomly recruited on their way out of Tate Exchange. The small base for the Christmas Family programme should be taken into consideration when interpreting the data for this event

## How old are you?



The Tate Exchange audience was significantly younger than the Tate Modern visitors, with 39% being below 25 years old and 74% younger than 35 years of age

### Light blue = drop in public

- Methods used were both qualitative and quantitative:
  - Observation: observation sheets on what was occurring on a day-by-day basis (these could be used by any of the teams working on floor)
  - Content analysis: personal statements were part of the content that participants contributed
  - Quantitative feedback was gathered by asking visitors to drop a coloured sweet into a jar in response to given questions\*:
    - We would like to know what you thought:*
      - If you had an experience that you wouldn't normally expect to have in an art gallery – add a WHITE sweet
      - If you had a conversation or an exchange with someone you've not met before that was stimulating – add a BLACK sweet
      - If your experience here wasn't particularly interesting – add ANY OTHER COLOURED sweet
- NB The idea was good but the method was flawed: more sweets were taken and eaten than used and we had no control to know how many people responded (over Sunday the count was i = 79; ii = 39; iii = 13)

Extract from 'Tasty and Smelly student report', University of Westminster, Tate Exchange 2017

Extract from Sphere Insights 'Tate Exchange Qualitative and Quantitative Research 2016/2017'



# THE PRACTICE AS RESEARCH PROGRAMME

## 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.

## REFLECTIONS

### PRACTICE AS RESEARCH

HELENA HUNTER, ASSISTANT CURATOR,  
LEARNING RESEARCH, TATE

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.

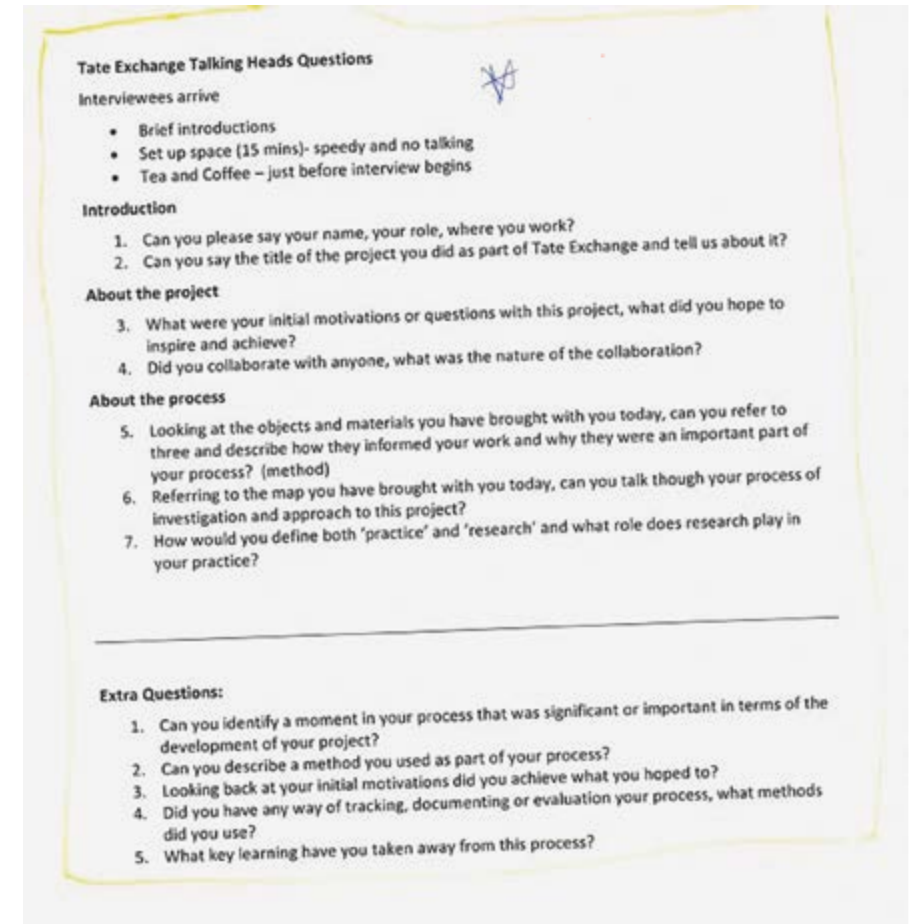
Through the process of making these films I developed an understanding of the value of research and reflective practice for curators, artists and researchers working within a museum context. It is interesting to note that since working with the researchers, three members of staff that took part in the 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](http://www.tate.org.uk/research/research-centres/learning-research)).

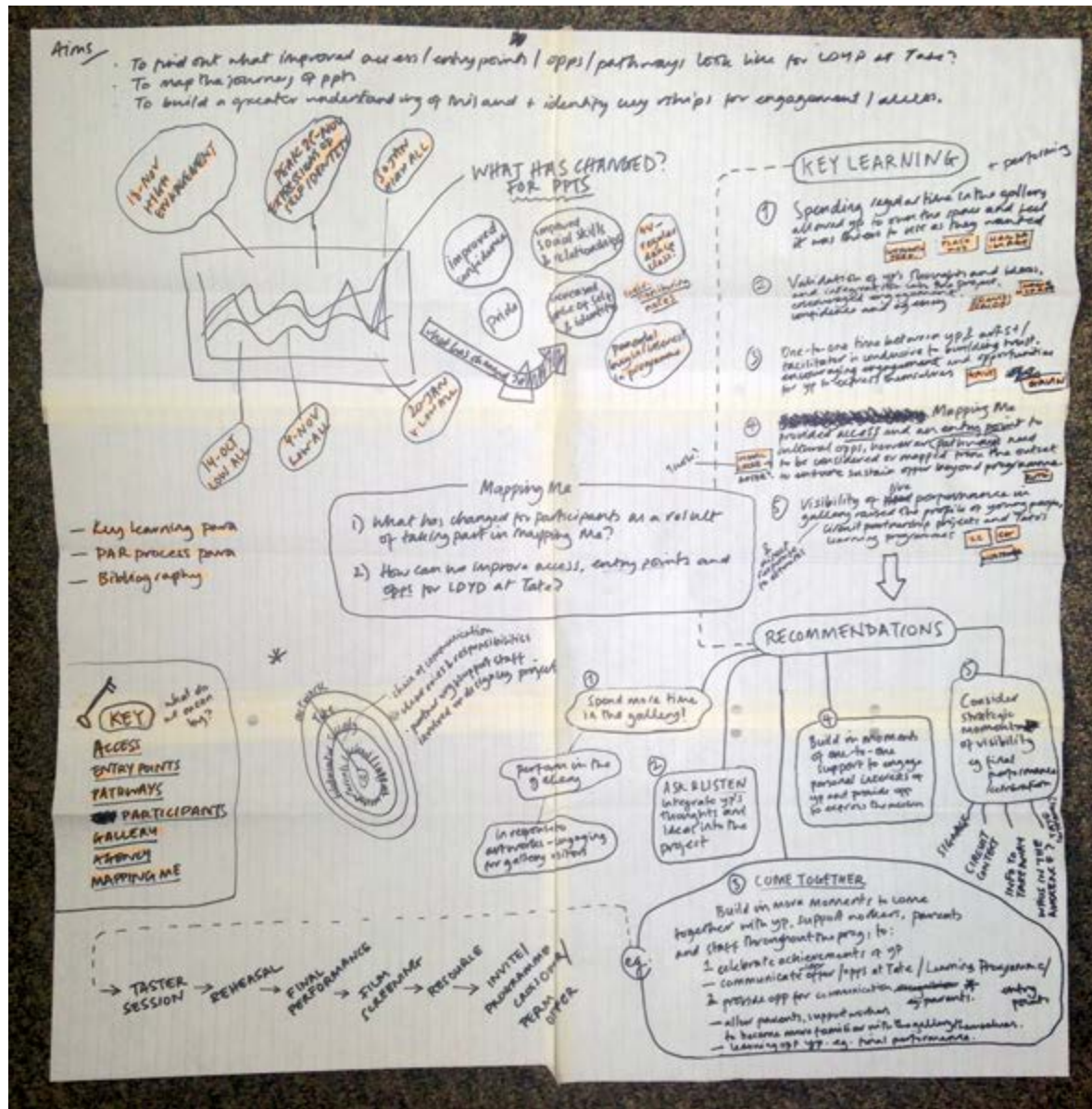


The making of the Practice as Research films



Extract from 'Practice as Research interview schedule and questions', Helena Hunter 2017





Rachel Noel, Curator: Young People's Programmes, Practice as Research notes 2016

## 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.



Image from Practice as Research filming with materials gathered by Adrian Shaw and Rachel Noel, Curators: Young People's Programmes, for Future Medina, Tate Exchange 2016



# 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 experiments 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 criticism about art that engages in social work but often overlooks the knowledge base of this work, and there was concern about where expertise fit in.

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.



*Experiments in Practice* panel discussion with Anna Cutler, Melanie Keen, Marjike Steedman, Miguel Amado, chaired by Emily Pringle



Extract of papers from *Experiments in Practice* working groups

Minutes from the TERE P Steering group meeting, 13 June 2017, detailing the *Experiments in Practice* event

**Update on Experiments in Practice Event (HH) 13.06.17 TERE P STEERING G.**

- The event happened just after the incident in London Bridge over the weekend, it felt even more urgent and pertinent given the circumstances.
- Some speakers referred to the attacks in their presentations, Emily gave a special mention in her welcome and numbers remained high at 80 approx. attending.
- There was a mixture of people from learning, curatorial, arts and beyond arts sector, museums and arts institutions, community based practices, young people, health or research.
- Fairly diverse in terms of ethnicity but could have been better
- There was a mix of London based and regional
- International reach next time important as borders close down.
- Event focused on knowledge sharing and generation, methods and strategies.
- Speakers gave short provocations that were further explored as groups in the afternoon.

# TATE EXCHANGE PHASE 3 – YOU ARE WELCOME

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 creating 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.

## REFLECTIONS

### PHASE 3 – YOU ARE WELCOME SARAH CARNE, ARTIST DEVISOR

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.

Signage in the galleries, on maps, lifts and toilet doors, along with postcards handed out by Visitor Hosts, invited people to 'come and tell us what you think'. The welcome sign that greeted people on stepping over the threshold of Tate Exchange was translated into over 40 languages by Tate staff from across all sites and the invitation then extended was 'Can you tell us a story about a time when art made a difference to your life?'

The responses we received are glorious in their range from the deeply personal to the light of touch. As such the framing of the question was successful. A number of contributions stated that being asked the question, in Tate Modern, had itself made a difference to their sense of being valued as an active contributor to debate around art. Equally effective was the invitation to share through an

accumulative display, with the steadily increasing array of sheets serving to indicate to those who arrived that this was an achievable activity that people had invested in. For those who preferred not to contribute, moving physically through the space reading stories was absorbing and rewarding, a role that was itself participatory. 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.

In conclusion, *You are Welcome* might be understood as a process of evaluation in action that successfully asked for and made visible a range of reflections on the value of art in society. But, for myself, acknowledging and attempting to redress the gaps in the voices that contributed is as important as the sum of what has been said. The most useful learning that happened as a result of the project I feel lies primarily in what wasn't captured or made visible but was discovered through the wider conversations that happened during the process. This might help, in part, to contribute towards redressing this imbalance in the future.



Tate Exchange Tweet from Phase 3 *You Are Welcome* devised by artist Sarah Carne, 2017



Tate Exchange Retweet from Phase 3 *You Are Welcome* devised by artist Sarah Carne, 2017

## REFLECTIONS

### PHASE 3 – YOU ARE WELCOME, AS AN EVALUATIVE EXERCISE

FIONA KINGSMAN, HEAD OF TATE EXCHANGE.

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 conversation 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.



# ADDITIONAL RESEARCH

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.

This project sought to foster a common digital space to support discussion around social and cultural issues, to build relationships with partners new to Tate, to make the work of TEx accessible to diverse publics and young people, and to give participants opportunities to contribute their own words and ideas.

Working closely together, the Tate Exchange Producer and an external Digital Project Consultant delivered an R&D project testing how to support TEx digital activity by: investigating how to promote deeper engagement with Tate Exchange digital audiences, amplifying conversations about social and other issues in relation to art, as well as surfacing and linking to existing conversations on other platforms, and gathering evidence for approaches to this.

Extract detailing the ambitions for the Digital 'deeper dive' research project, from 'Tate Exchange Online R&D', Camille Gajewski, Tate Exchange Digital Producer, Livvy Adjei, Digital Project Consultant and Rebecca Sinker, Convenor, Digital Learning

## 2. Plan of work

Camille Gajewski (Tate Exchange Producer) and Livvy Adjei (Digital Project Consultant) worked together for 21 days from December 2016 to April 2017, meeting once weekly in the Taylor Digital Studio or conferencing remotely as needed. The project was overseen by Digital Learning Convenor Rebecca Sinker.

**Objectives:** Investigating how to promote deeper engagement with Tate Exchange digital audiences, amplifying conversations about social and other issues in relation to art, as well as surfacing and linking to existing conversations on other platforms, and gathering evidence for approaches to this.

**Timeline:** December 2016 – April 2017, meeting on Fridays

**Outputs:** Three discrete digital projects that address the objectives above.

**Project budget:** Production budget is £2,500.

**Planning resources:** Shared Trello board, [content calendar](#), Google calendar.

**Outcomes:** Report with evidence of reach and engagement through test cases and analytics.

Extract outlining the plan of work for the 'deeper dive' research projects, from 'Tate Exchange Online R&D', Camille Gajewski, Tate Exchange Digital Producer, Livvy Adjei, Digital Project Consultant and Rebecca Sinker, Convenor, Digital Learning

## Tate Exchange at Tate Liverpool Year 1 Evaluation

### Contribution and Dissemination of Learning

Learning from TExL has contributed to the discussions around art's contribution to people's live and society at TL. It's principles and framework has informed how we work with partners and questioned how our curatorial teams from both Learning and Exhibitions can work together to deliver public programme.

We continue to learn from both our curatorial and Associate programme and how we can engage with the public through new perspectives. This openness, trust and willingness to learn throughout what we term as an open-experiment, is what gives us the freedom to adapt and change the institute to benefit our publics.

Extract from the 'Tate Exchange Liverpool Evaluation Report', Jessica Fairclough, Tate Exchange Co-ordinator, Tate Liverpool. From the section on Key Achievements and Unexpected Outcomes



Martial ART with Edge Hill University and Wirral Judo Club, Tate Exchange Liverpool 2017. Photo Jessica Fairclough



# WHAT WE HAVE LEARNT

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.

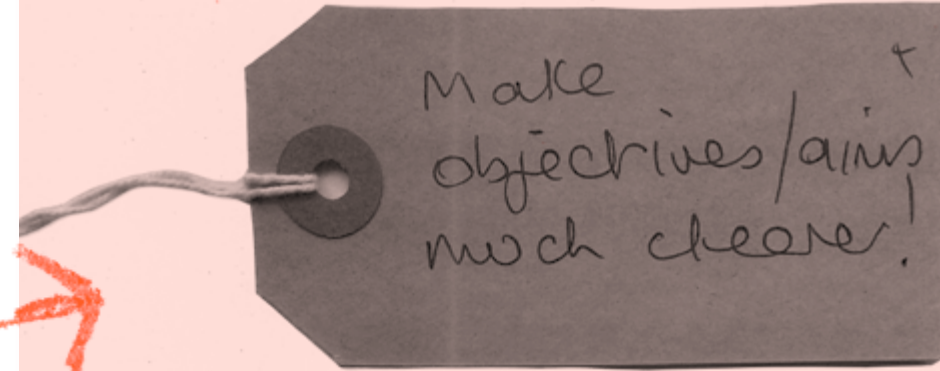
**EMPLOY MULTIPLE METHODS OF DATA COLLECTION TO CAPTURE THE COMPLEXITY OF THE EXPERIENCE AND TO BE ABLE TO TRIANGULATE FINDINGS**

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



Quote from Erin Barnes, Tate Exchange Associate Producer

Abundantly clear throughout the Associates planning and delivery was that this rigour was newfound to some and harder to play out in practice. It took hand-holding, encouragement and nudging of Associates through the process where for some, evaluation was an added layer of planning and reporting that was time consuming particularly to smaller organisations and those with limited time. In supporting Associates through such a rigorous evaluation process Tate Exchange opened up so much dialogue between them of how to creatively use programming to capture data, the fundamental questions about why and what date was important, and how to best embed evaluation into public activity. There were some exciting moments in planning with Associates - eureka moments that put evaluation at the heart of public experience.

The Tate Exchange team continually reflected on learning, in effect, working through an action research cycle (plan, act, observe, reflect) to explore and refine the best use of the Tate Exchange space and share this learning with others. Tate Learning staff, the TEx team and Associates identified challenges in meetings, debriefs and event reports.

Feedback on the Tate Exchange evaluation and objectives, Associates day 2017

Extract from 'Year 1 Tate Exchange Evaluation Report', Hannah Wilmot 2017

experiments in practice group discussions

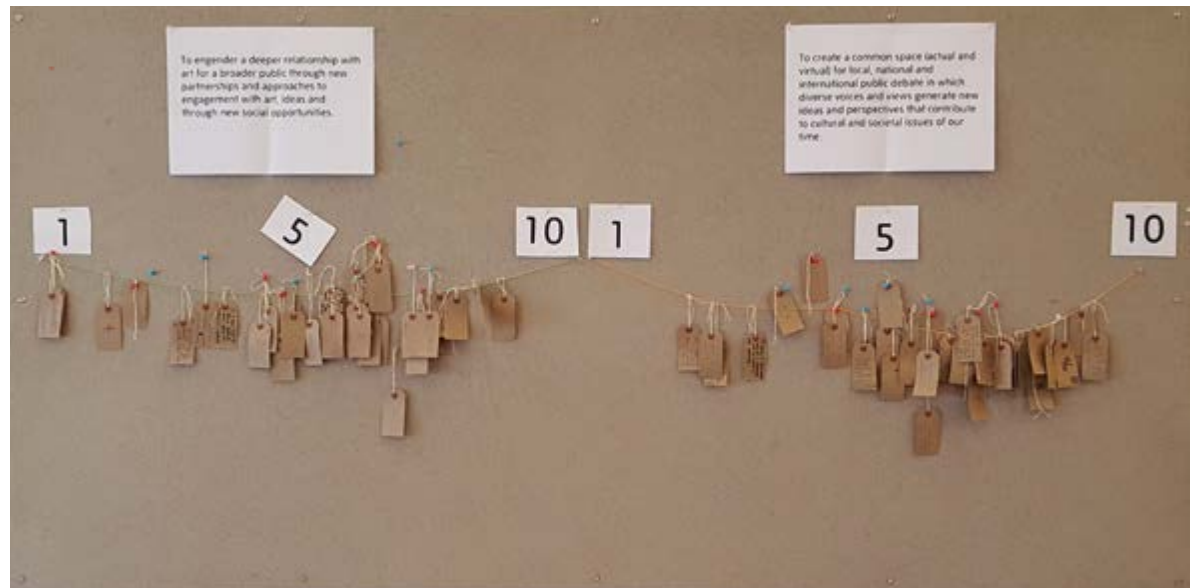




In brief, this report is in part a meta-analysis of data and reports produced by a wide range of people and is therefore reliant on the skills, confidence and experience of those individuals in relation to evaluation. For example, the evaluative content of the daily reports increased as VE staff gained experience and confidence in their role and the Tate Exchange team identified key elements for reporting. Joining Tate Exchange shortly before its launch gave an urgency to designing an evaluation framework and this was therefore drafted by the evaluator with input from a limited number of Tate staff. Ideally, this would have been developed through a more consultative process with a wider range of stakeholders.

To engender a deeper relationship with art for a broader public through new partnerships and approaches to engagement with art, ideas and through new social opportunities.

To create a common space (actual and virtual) for local, national and international public debate in which diverse voices and views generate new ideas and perspectives that contribute to cultural and societal issues of our time.



Luggage tag exercise, Associates day 2017. Associates' feedback on how they rated their event against the Tate Exchange objectives and values.



Evaluation Forum - Feedback on the evaluation protocols for Tate Exchange from Tate Learning Teams

What's Been Useful?

- A tailored approach.
- Conversations with evaluator and digital producer to identify critical questions and evidence.
- This meeting has been really useful!
- Debrief sessions with team and artists.
- Useful to have conversations and share experiences.
- 'Feedback narrative' aka conversations.
- Forced reflection. Taking time to stop and reflect, rather than moving straight onto the next thing.
- Dedicated time.
- Useful to know that the event reports are being read and used and will make a difference.
- Having the shared GDrive to see other teams evaluation feedback.
- Seeing how different teams value evaluation (or not).
- Hearing evaluation about others' projects.
- Immediate, post event debriefs and reflection with project team and externals.
- Participating as much as programming.

What's Been Challenging?

- Lengthy terms and event reports, time consuming.
- We don't have a shared / central document yet (or do we?)
- Finding the time to write up event report.
- The rapidity of the programme made gathering info, collating it and sharing it in a timely manner has been challenging, info held by different teams/people.
- Time to digest all the data.
- Fully evaluating one project while delivering others.
- Feeling silenced by certain colleagues.
- Capturing 'moments' or spontaneity.
- Not all categories relevant/applicable to all events but feeling a pressure to fill them in anyway - often duplicating material.
- Who dictates the discussion around a project?
- Who dictates how things/projects are reported?
- Time commitments.
- Sometimes it's not always clear why we're doing this and how it will impact the future.

What Could We Do Differently?

- Let us know from the start how our findings will impact the future programme.
- Still time to 'interview the participants'.
- Ability to debrief after visiting the space - maybe online via TEX webpage?
- Having opportunity to share logistical knowledge from projects across the departments to make processes smoother/more efficient.
- More/different kind of team/departmental collaboration.
- In depth case studies, shared in forums?
- More ongoing sharing of reports.
- Exposing failures and learning from them, what would we do differently next time.
- How we join up / share with other teams as part of the process i.e. marketing, VE, AV
- De-briefing sessions with the artist, members of the public and other teams = AV and VE.
- More breathing space within the programme (and thinking).
- Tate Exchange across-team Away Day.
- Involve external perspectives on TEX aims and success/failure of these.
- Differentiate internal evaluation from audience evaluation (where possible).
- Updating the framework post year 1.
- More one-on-one reflection.



## 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.

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



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, TEREP 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.

## ACKNOWLEDGEMENTS

Very many thanks to the following:

Jane Steele, Director Evidence and Learning, Paul Hamlyn Foundation, Anna Cutler, Director of Learning, Tate, Hannah Wilmot, Tate Exchange Evaluator, Jessica Fairclough, Tate Exchange Coordinator, Tate Liverpool, Nicki Setterfield, Researcher, Maurice Carlin, Clore Fellow, Hollie Mackenzie, PhD Researcher, University of Kent, Erin Barnes and Gemma Clarke, Tate Exchange Associate Producers. All the members of the Tate Learning and Visitor Experience teams and Tate Exchange Associates who contributed to the evaluation.

TEREP Steering group:

Eileen Carnell, Freelance Arts Education Specialist, Lindsey Fryer, Head of Learning, Tate Liverpool, Helena Hunter, Assistant Curator Learning Research, Tate, Fiona Kingsman, Head of Tate Exchange, Tate Modern, Helen Nicholson, Professor of Theatre and Performance, Royal Holloway University, Steve Moffitt, Chief Executive Officer, A New Direction, Helen O'Donoghue, Senior Curator, Head of Education and Community Programmes, IMMA, Becky Swain, Learning and Participation Officer, Arvon, Chrissie Tiller, Creative Consultant and Practitioner, Chrissie Tiller Associates and Jasmine Wilson, Director of Learning, Random Dance.

Particular thanks to Rita Evans, Learning Research Administrator for all her work co-ordinating this publication

Experiments in Practice: Learning from the Evaluation of Tate Exchange Year One  
Produced by Tate Learning  
Edited by Emily Pringle, Head of Learning Practice and Research, Tate

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Design by Tate Design Studio

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phf Paul Hamlyn  
Foundation





