

Weston Loan Programme with Art Fund

Evaluation of Phase 2

Rachel Escott, Creative Communications

Phase 2 – Weston Loan Programme evaluation

WLP evaluation – a brief history

- From the start, the evaluation was designed as 'action learning' environment
- Along with insights about how the programme was working
- Insights from Phase 1 (2017-2020) were used to improve WLP for Phase 2
- Interim evaluation Phase 2 (2020-2023) used to evolve WLP to Phase 3
- For example:
 - more support and training resources provided on how to evaluate
 - individual support for PR and marketing advice
 - guidance on core aims to focus on

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Why evaluate?

- The Weston Loan Programme awards allowed our cohort to put on an exhibition they otherwise wouldn't have achieved
- In most cases, the workload and skills expected of staff to achieve this were huge
- So, why was it so important to them to undertake such an exhibition at all?
- Evaluations by grant holders themselves aimed to help them make the most of and consciously learn from the opportunity

Phase 2 – Weston Loan Programme evaluation

Why evaluate?

- Grant holders encouraged to reflect on the whole experience of the exhibition
- Share the experiences and insights with the widest possible colleague (and volunteer etc) base
- Identify what helped or hindered each aim
- Take note of **WHAT THEY WILL CHANGE** and embed in the organisation as a result of WLP
- Thinking about these aspects, sharing, talking and then reporting on them helps the unconscious become conscious and dreams become actions

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Encouragement

“The evaluation process associated with the Weston Loan scheme was particularly important in helping us take our exhibition policies to the next level, improving our understanding of how to develop more specific KPIs for our exhibitions and instituting new procedures to measure them. This also led to an improved relationship with our marketing team.”

“Collecting and recording informal visitor comments was a new process that we implemented as part of this evaluation. This provided new insights into audience satisfaction, allowing us to understand what motivates our visitors with more clarity and helping to inform future programming.”

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ALSO

“We have incorporated the use of set and variable KPIs into our exhibition policy for future exhibitions. This includes the use of the Evaluation Tool Spreadsheet as well as the qualitative data feedback tool supplied as resources by the Weston Loan Scheme.”

“We have introduced a new, earlier deadline for the setting of KPIs in future exhibition planning.”

“Having introduced new evaluation tools during this project for audience development, we will be able to continue to use these to build up our understanding of our audiences.”

How we evaluated

- Three 'set' key ambitions as a result of the exhibition itself:
 - Increase visitor numbers overall
 - Increase visitor satisfaction
 - Increase income from visitors
- Invitation to reflect on the legacy of WLP involvement
- The above were chosen as core considerations affecting the future strength of most organisations
- Choose up to 4 additional 'bespoke' key ambitions (KPI for short)

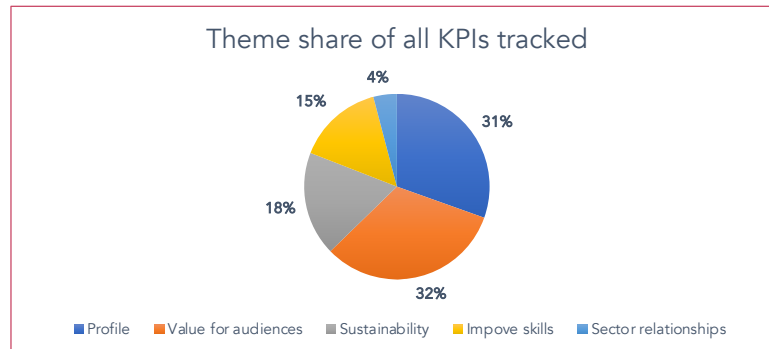
How we evaluated

- For each KPI, identify a comparable 'base' period and starting data
- Decide (with advice) what evidence needed to prove relative success
- Decide (with advice) how to gather the evidence
- At the end, assess how well you did for each KPI (with supporting data)
 - 1 = not achieved, 2 = partly achieved, 3 = largely achieved, 4 = fully achieved and 5 = exceeded.
- Consider what helped, what hindered, what to embed as change
- Top 3 bits of advice to pass on

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Themes

- In Phases 1&2 KPIs have fallen into theme areas. NB these *include* the 4 set KPIs
- Average number of KPIs across all, including the set KPIs, was 7.23



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Including:

Profile: (more visitors, more from region or UK, better PR, new marketing techniques, more diverse audiences etc)

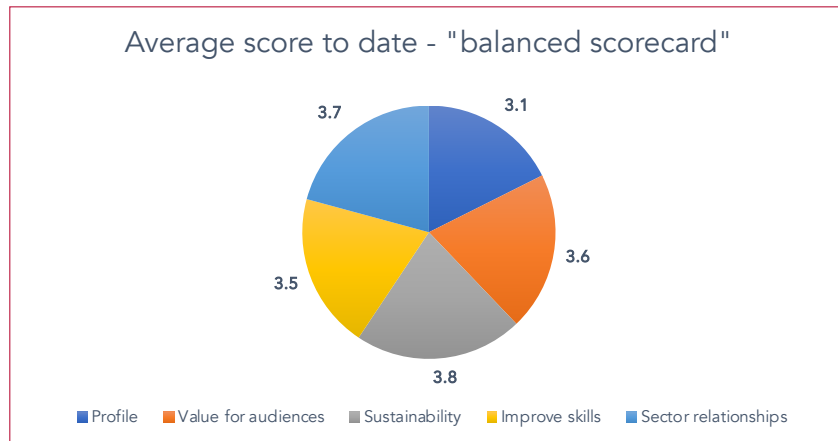
Value for Audiences: (satisfaction, better interpretation, more/ better engagement or learning programmes, basis for future variety and quality of exhibition etc)

Sustainability: (income from visitors, better funder engagement; better visitor insights to do better marketing and better programming to increase future audiences, more applications to funders or lenders, local community (inc LA) support)

Improve skills: (staff and volunteer skills and confidence, research skills, production of catalogue etc)

Sector relationships: with current lenders, with future potential lenders, with other museums etc, with local organisations such as schools, universities, community groups.

Successes



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Successes

- For all themes, grant holders generally 'largely achieved' or better
- NB – scores out of 5
- Masks some very high and some very low scores
- Includes those impacted by Covid-19 and the rising cost of living
- All, even those facing the greatest challenges, considered they had achieved well against at least one of their KPIs
- 'Balanced scorecard' – important for future viability that museums and galleries perform well in each direction.

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Ambitions

- Need to see success in context of ambitions
- More successful if fully embedded in the organisation's overarching strategic ambitions
- Some evidence that paying attention to a larger number of ambitions correlates to reduced average success scores for those organisations
- All members of the organisation's team must be on board with the exhibition
- Need to be better prepared for unforeseen crises or challenges: global, national or local. These get most in the way of achieving their chosen aims.

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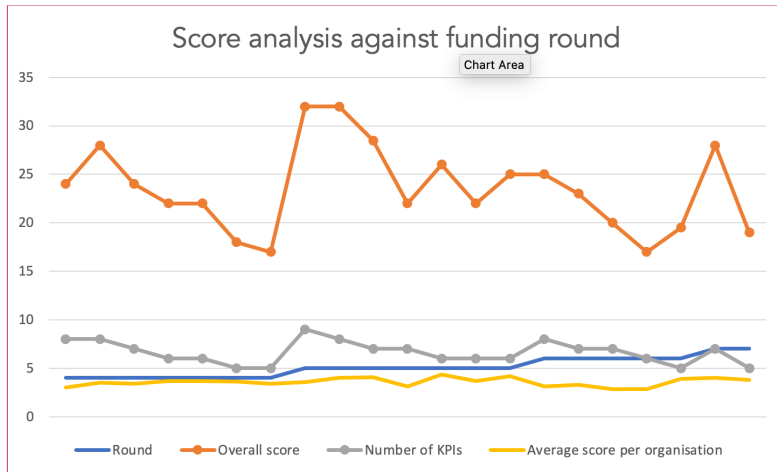
1. Exhibitions are more successful if fully embedded in the organisation's overarching strategic ambitions – that the subject, style or audiences for the exhibition, for example, were specifically chosen to fulfil long term policy direction for their sustained future.

2. Choosing a higher number of KPIs to track inevitably led to a higher overall score for those organisations. Yet there is some evidence that grant holders may have 'bitten off more than they could chew' in their eagerness to show that they were worthy recipients of the grant. It appears that paying attention to a larger number of ambitions correlates to reduced average success scores for those organisations

3. All members of the organisation's team (including staff, volunteers, managements, trustees and funders or supporters) must be on board with the exhibition, and that information about the detail and the purpose is not kept within a restricted curatorial team until fairly late in the planning process.

4. Organisations need to be better prepared for the unforeseen crises or challenges that may come along, whether on a global or national level, or indeed in their local economy or organisation. These are often the things that get in the way of achieving their chosen aims. They need to better recognise the impact on them of circumstances beyond their control, and properly stress-test their risk assessments against things that, by definition, are unexpected. There were already references to the impact of unusual weather patterns for the time of year. One can easily foresee storm damage, flooding, extreme heat and other climate impacts being among future 'unforeseens'; as well as, perhaps, the increasingly precarious state of local authority finances.

Ambitions



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1. Wide variety of ambition in number of KPIs
2. Lower number of ambitions when Covid or cost of living challenges were most prevalent (in planning stages).
3. Correlation – more KPIs to lower average success score.

Ambitions

- Profile
 - 27% of bespoke profile aims were to improve regional and national profile
 - 15% were for new or more diverse audiences (cf. 46% in Phase 1)
- Value for audiences
 - Very wide-ranging, specific to local circumstances or audiences, however ...
 - 15% to improve/ expand engagement programme
 - 11% to improve/ expand learning programme ... both again much lower than Phase 1
- Challenging contexts lead museums to rein in ambition and focus on core delivery and consolidating finances. Eg, drop-off in digital ambitions post-Covid

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1. 27% of aims in the Profile topic concerned improvements to their national or regional profile, using the loans to cast themselves in a new light. In contrast 15% concerned reaching new or more diverse audiences. This contrasts to Phase 1, where 46% of ambitions concerned diversifying audiences.

2. On the other hand, aims that would contribute to Value for audiences were very wide ranging, and often specific to their own particular audiences or situation. Grouped, the most popular sub-topic revolved around improving or expanding the engagement programme (15%) or the learning programme (11%). Again, this contrasts to the corresponding 37% and 26% in Phase 1.

3. the challenging external contexts for grant holders has led them to rein in their more expensive or staff-intensive activities in favour of those that would more assuredly boost their income or strengthen their core viability, such as sheer increase in visitor numbers and cannier decisions about merchandise. So, for example, improvements to the engagement programme were more likely to include charging for events and family activities rather than offering them for free.

4. Ambitions to improve the digital offering came through more strongly at the height of the pandemic but seem to have fallen away again more recently. This too may be because creating digital assets is time- and cost-heavy, but hard to make money from.

Ambitions

- Sustainability
 - Biggest focus was simply on making money from increased visitor numbers
 - A few wanted to use the exhibition to reinforce support and loyalty among higher level donors or funding organisations, or to attract new supporters
- Skills/ Legacy
 - 14% chose additional bespoke aims about developing staff and/or volunteer skills
- Sector relationships
 - Only 4% of bespoke ambitions concerned improving relationships with other sector bodies – though this is in marked contrast to what grant holders actually experienced (in a good way!)

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1. Few grant holders set ambitions in the heading of Sustainability beyond making money from visitors through tickets, secondary spend or donations. A few saw a bigger picture of using the exhibition to reinforce support and loyalty among higher level donors or funding organisations, or to attract new supporters and funders at that higher, more sustained level. Occasionally this was linked to boosting the local economy, as a way of securing support amongst local people and therefore local Councillors.

2. All grant holders were asked to reflect on the longer-term legacy of the WLP-supported exhibition for staff skills and organisational behaviour, but 14% of aims were from grant holders who very decidedly wanted to use the opportunity for this purpose.

3. While only 4% of ambitions concerned improving Sector relationships, the detailed findings (see p19) show this is in marked contrast to the actual areas in which they made their most significant advances.

Phase 2 – Weston Loan Programme evaluation

Principal lessons

- Greatest learning technique came from reflecting as a wide team on the experiences with insights from many parts of the organisation
- Included 'positive' learning from things that had helped, and 'negative learning' from things that had stood in their way

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There were many examples given by the grant holders of learning from the process of these exhibitions and loans, whether that was 'positive' learning from things that had helped them achieve their aims, or 'negative learning' from things that had stood in their way. But the greatest learning prompt was in asking them to reflect as a wide team on the experiences under each key ambition they set out to track, and to allow insights to come from many parts of the organisation.

Principal lessons

- Profile
 - Increasing budgets, buying-in specialist skills and preparing well in advance for good marketing and PR actions were the most crucial in increasing visitor numbers
 - Convey the high profile of the loans, a strong story with local or collection connections and a single, clear 'narrative' about the exhibition
 - Vary the messages to highlight things most of interest to different desired audiences
 - Transmit messages via the most appropriate channels the desired audience would pay attention to

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1. Enhanced marketing and PR activity, not surprisingly, was seen as the most important driver for increasing visitor numbers. Allowing greater budgets, buying-in specialist skills and preparing well in advance for good marketing and PR actions were all the most crucial steps in achieving success here.
2. Sitting behind this, it was necessary to convey the high profile of the loans and ideally a strong story with local connections or that shone a clear and fresh light on the grant holder's own collections. There had to be a single, clear 'narrative' about the exhibition that could be easily grasped by both the media and the public (eg from posters, flyers or social media)
3. To attract new audiences (whether new to exhibition-going or new just to their venue) the most useful approaches were to vary the messages about the exhibition to highlight things most of interest to the desired audiences and over the course of the run. That might be 'great for the family' or might be 'most skilled craftsperson'. And, to transmit those messages via the most appropriate channels that the desired audience would pay attention to. Again, this held true whether the channels are specific local Facebook pages, community group leaders, local radio or dedicated specialist magazine or travel press.

Principal lessons

- Value for audiences
 - ‘Keep the visitor viewpoint in mind all the time’
 - Track visitor feedback to make improvements during the life of the exhibition
 - Seeing significant works close to their home was appreciated for both convenience and a sense of local pride
 - New or enhanced interpretation because of the money available for the exhibition
 - Using the need for volunteers or staff to be in the exhibition space with the loan items, to train those assistants to also engage with and explain more in person
 - Extra techniques, such as interactives, comment areas, audio content and films
 - Sometimes worse to have an element that doesn’t work well, than not have it at all, in terms of visitor satisfaction

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1. One grant holder put it as ‘keeping the visitor viewpoint in mind all the time’. Several grant holders commented that they either successfully tracked visitor feedback and could make improvements during the life of the exhibition; or wished they had been able to do this better.
2. Aside from the satisfaction of being able to see significant works close to their home, which was appreciated for both convenience and a sense of local pride,
3. it was the ways the exhibitions were presented and interpreted that gave the most satisfaction to visitors. Several grant holders had introduced new or enhanced interpretation because of the money available for the exhibition.
4. Some made use of the need for volunteers or staff to be in the exhibition space with the loan items, to train those assistants to also engage with and explain more about the exhibits in person. The friendly, welcoming atmosphere and added information this offered garnered many visitor comments in several museums and galleries.
5. Others introduced a variety of extra techniques, such as interactives, comment areas, audio content and films. Some also gave added value through online content and catalogues.
6. Occasionally the plans didn’t work out. Lighting levels, label size, noise interference or technology not working sometimes got in the way of the interpretation approaches being fully appreciated. Indeed, it is sometimes worse to have an element that doesn’t work well, than not have it at all, in terms of visitor satisfaction.

Principal lessons

- Sustainability
 - Greatest source of increased income was simply the increased number of visitors
 - But maximise secondary spend by intelligently (& early) developing a merchandise range linked to the exhibition, and with items at a wide range of price points and styles
 - Catalogues in almost all cases made a profit
 - Donations - be 'braver' about asking for money, including training to ask
 - Put out information about how crucial donations are to the viability of the organisation
 - Some tried to enhance their donor and supporter engagement but were thwarted by Covid
 - Most did not identify this as an opportunity to be exploited
 - Do thorough risk-assessment and mitigation plan early to avoid losses

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1. The greatest source of increased income was simply the increased number of visitors buying tickets and making secondary spend in the shop, café and for associated events. Therefore, the things learned about how best to increase numbers and raise profile are hugely important here too.
2. Maximising that secondary spend, however, came down to intelligently (and again, in plenty of time) developing a merchandise range that both linked to the exhibition and offered items at a wide range of price points and styles. Those grant holders that produced a catalogue found that in almost all cases it made a profit, as the high levels of satisfaction and engagement with the exhibition made people want to take something home that they could explore further.
3. In terms of fundraising and donations rather than transactional income, grant holders found it good to be 'braver' about asking for money. This included training staff to literally ask, as well as publicising information about how crucial donations are to the continued viability of the organisation. While this more overt style of asking for money was often uncomfortable for staff, it was used more often and more successfully than any increase in approaches to higher-level funders and donors. One or two tried to greatly enhance their donor and supporter engagement but were thwarted by Covid restrictions. Most of the others did not identify this as an opportunity to be exploited.
4. A great many additional grant holder-specific issues were seen as responsible for lower than hoped-for income generation. To prevent such loss of opportunity for similar large-scale projects, I would advise a thorough risk-assessment and mitigation plan be put in place early.

Principal lessons

- Skills/ legacy
 - Working as a team across departments to develop the exhibition allows seamless integration of marketing, merchandise, learning and other activities
 - Grant holders leaned most by 'doing it' i.e. that this was an action-learning experiment
 - The opportunity to take risks and try new things – the most productive learning
 - Including the opportunity to learn from things that didn't work
 - Both formal and informal learning opportunities and outcomes
 - Big boost in confidence for future borrowing

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1. A more strategic take-away from the experience was that working as a team across departments to develop the exhibition would allow seamless integration of marketing, merchandise, learning and other activities. Grant holders leaned most by 'doing it' i.e. that this was an action-learning experiment, and that the reflective approach to evaluation they were asked to follow by WLP contributed to this. Crucially, they were given the opportunity, through being part of the Weston Loan Programme, to take risks and try new things, which is the most productive learning framework. This includes the opportunity to learn from things that didn't work.
2. Many referred both to formal and informal learning opportunities and outcomes.

Phase 2 – Weston Loan Programme evaluation

Principal lessons

- Skills included:
 - Administrative processes to ease the workload
 - How to work better across teams
 - Art-historical training to help front of house staff add value to the visitor experience
 - Techniques to collate and analyse qualitative feedback from visitors
 - Learning to de-mount and pack loaned works confidently
 - Skills relating to marketing, such as being able to judge relative impact of different marketing actions, or to develop digital materials for social media engagement

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Formal and informal learning opportunities and outcomes and skills they developed are included here.

Principal lessons

- Sector relationships
 - Some of the strongest and most valued learning moments came from the interactions with lending organisations and other partners
 - Lending organisations were extremely accommodating, flexible and informative
 - Some went out of their way to give additional support over and above the loan arrangement
 - Put down to, eg, Covid-19 working-from-home changing the way people interacted
 - Perception that the 'nationals' also 'need' to lend their works to increase their own audiences and meet funding requirements
 - Heightened reputation of Weston Loan Programme within the sector
 - Any problems could be improved by starting the process MUCH earlier!

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1. Few grant holders indicated they wanted to pay specific attention to relationship-building within the sector at the start of the evaluation process.
2. In the event, some of the strongest and most valued learning moments came from the interactions with lending organisations and other partners.
3. In most cases (and in contrast to Phase 1) the lending organisations were extremely accommodating, flexible and informative.
4. Some went out of their way to give additional support over and above the loan arrangement.
5. For the grant holders in Phase 2 this was put down to, variously, the Covid-19 restrictions and working from home suddenly changing the way people interacted with each other; and to the perception that the 'nationals' also 'need' to lend their works to increase their own audiences and meet their funding requirements. I also consider that the reputation of Weston Loan Programme within the sector has been boosted by PR work carried out by Art Fund staff. Art Fund also sought more opportunities to bring lending and borrowing institutions together in advance of Phase 2. Both activities have helped the lending organisations view those borrowing from them as proper collaborators rather than as a nuisance.
6. That said, there were times when lenders could not respond quickly enough (often when staff were furloughed), when items requested were not available or in a condition to be loaned, or when the lenders' timescales for making decisions was far out of step with the borrowers'

planning timescales. All these things could have been improved – as very many of the grant holders acknowledged – by starting the process of planning a loan exhibition, making contacts, and researching potential objects much earlier than they have tended to do.

Adapting

- Be strategic:
 - Approach and plan for all aspects of projects much further in advance, so the organisation can properly determine what it wants to achieve and why
 - Propose future exhibitions only if they clearly fulfil the overarching strategic goals of the organisation
 - Draw up a realistic list of the time and money needed
 - Be more specific about which audiences to attract, what those audiences need, and how to continue providing for or engaging with them in future
 - Identify what training or support staff and volunteers might need

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1. Being strategic involves approaching and planning for all aspects of projects much further in advance, so the organisation can properly determine what it wants to achieve and why, and how to structure things to ensure this happens.
2. Steps might include proposing future exhibitions only if they clearly fulfil the overarching strategic goals of the organisation; drawing up a realistic list of the time and money needed to support the project; being much more specific about which audiences they hope to attract, what those audiences need, and how to continue providing for or engaging with them in future; identifying what training or support staff and volunteers might need to deliver a project; and providing it.

Adapting

- Increased use of digital communications
- More focussed alignment of message <-> channel <-> audience
- Start earlier!
- Pay closer attention to what visitors, including different types of visitors, want from their visit and how best they feel it is delivered
- Make space to learn from the visitor feedback, and to consciously feed adaptations back into preparation for the next exhibition
- Learn from and react to visitor preferences to increase income streams
- Be aware of hidden costs

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1. In relation to increasing visitor numbers and the profile of the organisation, no one single thing stood out; rather a wide range of actions had been tried, which they consciously monitored. This resulted in clarity about what actions need to be continued or strengthened in order to perform even better next time round. An increased use of digital communications and more focussed alignment of message <-> channel <-> audience are probably the two main areas for improvement – along with starting earlier.
2. The proposed future actions for increasing visitor satisfaction with exhibitions could be summed up as paying closer attention to what visitors, including different types of visitors, want from their visit and how best they feel it is delivered. This will involve better evaluation techniques but also making space to learn from the visitor feedback and to consciously feed adaptations back into the preparation for the next exhibition. In this way a virtuous circle of improvements and increased satisfaction can be created. Facets of an exhibition that they intend to work on include layout, interpretation, associated events, price or pre-visit information.
3. Several grant holders intend to apply this same attitude of learning from and reacting to visitor preferences to increase their income streams. They had discovered that different people would be attracted to purchase things at different price points; that people like to buy things linked to the exhibition; that these days donations are as (or more) likely to be given by contactless payment or online; that it's worth developing a good online shop in addition to the physical shop etc.
4. Some also intend to be more purposeful in programming events of the type they realise their audiences respond best to, and to price them in accordance with what their visitors deem the

events to be worth.

5. As with other areas, we see a resolution to begin these processes earlier
6. In the case of merchandise and catalogues, to be aware of hidden costs of image permissions, for example, that might reduce the profit line.
7. In terms of donations and fundraising, many grant holders implied they would have confidence to make more funding applications for similar projects.
8. There were a few mentions of how they would change the way they promote the need for donations from visitors.

Adapting

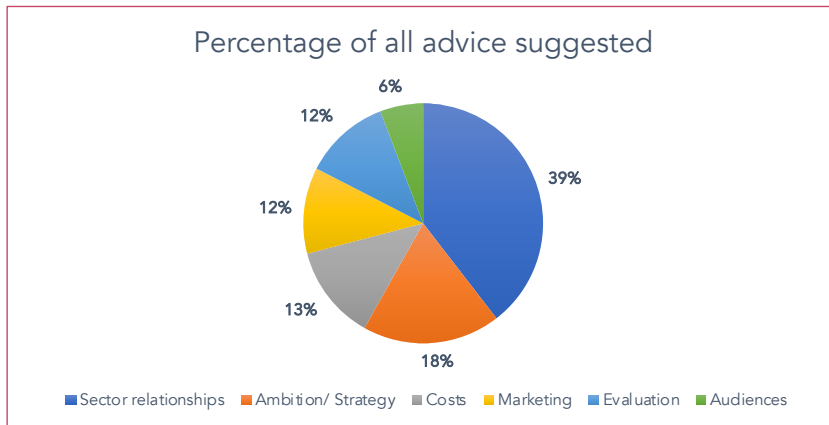
- Plan for the legacy
- How to continue to deliver on new visitor expectations
- How to continue to support staff capacity and skills.
- ‘Work smarter’
 - Cross-team working embedded in the way big projects are conceived and developed
 - Better daily internal communications and sharing of information
 - Keep colleagues and volunteers on board by frequently refreshing messages about the importance of what they are being asked to do

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1. Being strategic involves approaching and planning for all aspects of projects much further in advance, so the organisation can properly determine what it wants to achieve and why, and how to structure things to ensure this happens.
2. This also involves planning for the legacy of the project.
3. ‘Working smarter’ included cross-team working embedded in the way big projects are conceived and developed; better internal communications and sharing of information; and keeping colleagues and volunteers on board by frequently refreshing messages about the importance of what they are being asked to do.

Phase 2 – Weston Loan Programme evaluation

“I wish I’d known ...”



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Top line findings – advice to sector – compare this to % ambitions for themes (especially sector relationships).

Phase 2 – Weston Loan Programme evaluation

“I wish I’d known ...”

- Sector relationships
 - 23.5% start contact much earlier
 - 23.5% build relationship with specific people
 - 20.6% thoroughly research the lender and their loan policies and timescales
- Also:
 - research the condition of the artworks requested (8.8%)
 - have a back-up list that still tells the story (5.9%)
 - trust the lender
 - research any limitations on merchandise/ image use
 - smaller organisations may be more generous

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Sector relationships

- Start the process early (23.5% of mentions in this topic)
- Build relationships with specific staff in the lender organisation (23.5% of mentions in this topic).
- Research the lender before you start (20.6%).
- Other advice included:
 - research the condition of the artworks requested (8.8%)
 - have a back-up list that still tells the story (5.9%)
 - trust the lender
 - have extended partnerships and runs (ie touring)
 - but be clear on what each partner is agreeing to do
 - research any limitations on merchandise/ image use
 - Smaller organisations can be more generous.

Phase 2 – Weston Loan Programme evaluation

“I wish I’d known ...”

- Ambition
 - 43.8% garner a cross-team view when developing plans for such an exhibition programme
 - 18.8% it IS worthwhile doing
 - 12.6% realise your skills deficits and train staff and volunteers accordingly
 - 6.3% be clear about your aims from the start
 - 6.3% have fewer, stronger loans

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Ambition

- Garnering a cross-team view when developing plans for such an exhibition programme accounts for nearly half of all advice around ambition (43.8%).
- The other items included:
 - it *is* worthwhile doing (18.8%)
 - realise what your skills deficits are and train staff and volunteers accordingly (12.6%)
 - be clear about your aims from the start (6.3%)
 - have fewer, stronger loans (6.3%).

“I wish I’d known ...”

- Costs
 - 27.3% budget to buy in staff time and skills
 - 18.2% allow for unexpected costs
 - 18.2% allow for costs of licenses and technicians
- Also:
 - assess the cost-benefit of each loan item
 - invest in good digital ticketing software
 - insure against the GIS coverage shortfall
 - group your loans from fewer lenders, to save costs

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Costs

- Budgeting for buying in skills or time that your staff don’t have, to meet the scale of ambitions you have set, was the commonest piece of advice in this topic – 27.3% of mentions.
- Allowing for unexpected costs and time – having a contingency set aside for things you hadn’t even realised would be needed (18.2% of advice in this topic).
- Allow for the cost of licenses and technicians (during install etc) – 18.2%.
- The remaining pieces of advice included:
 - assess the cost-benefit of each loan item
 - invest in good digital ticketing software
 - insure against the GIS coverage shortfall
 - group your loans from fewer lenders, to save costs.

Phase 2 – Weston Loan Programme evaluation

“I wish I’d known ...”

- Marketing
 - 30% value of collecting and using visitor insights
 - 20% using community participation to create buzz and word of mouth
 - 20% generating excitement about the loans visiting
- Also
 - trust your visitors to give good word of mouth recommendations as part of your marketing
 - borrow objects with a strong local connection
 - start the permissions process early so you can prepare assets for marketing use

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Marketing

- The main type of advice in this topic concerned using visitor insights (30%).
- Using community participation to increase buzz and word of mouth was advised 20% of times.
- Similarly, creating excitement about the loans saw 20% of advice given in this topic.
- Other advice covered:
 - to trust your visitors to give good word of mouth recommendations as part of your marketing
 - borrow objects with a strong local connection
 - start the permissions process early so you can prepare assets for marketing use.

Phase 2 – Weston Loan Programme evaluation

“I wish I’d known ...”

- Evaluation
 - 30% importance of planning and coordinating for evaluation
- Also:
 - use ticketing systems to gather information about visitors
 - ensure whole-team buy-in to the need for and value of evaluation
 - train staff and volunteers to carry out evaluation
 - set baselines so you can judge your progress properly

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Evaluation

- The importance of planning and coordinating for evaluation was mentioned 30% of times in this topic.
- Other pieces of advice, each receiving 10-20% of mentions, include:
 - use ticketing systems to gather information about visitors
 - ensure whole-team buy-in to the need for and value of evaluation
 - train staff and volunteers to carry out evaluation
 - set baselines so you can judge your progress properly.

Phase 2 – Weston Loan Programme evaluation

“I wish I’d known ...”

- Audiences
 - 60% ways of looking at the whole experience of an exhibition visit from the visitors’ viewpoint
 - One grant holder observed that combining contemporary and historic themes and loans broadened the type of visitor they appealed to
 - One advised to find ways to act on the visitor insights gleaned from feedback to make improvements

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Audiences

- 60% of advice in this topic were ways of looking at the whole experience of an exhibition visit from the visitors’ viewpoint.
- One grant holder observed that combining contemporary and historic themes and loans broadened the type of visitor they appealed to.
- Another advised organisations to find ways to act on the visitor insights gleaned from feedback to make improvements.

Phase 2 – Weston Loan Programme evaluation

Are you ready?

“Before borrowing, consider your evaluation processes - how will you measure the impact these loans will have on your museum or gallery? You will learn so much more if you have the necessary measures in place to get feedback from visitors and colleagues about their experience.”

“Agree the KPIs, monitoring and evaluation processes with colleagues as early as possible, with one person coordinating the process – in this case, it was led by the exhibition’s curator with support from at least one person from every department.”

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Phase 2 – Weston Loan Programme evaluation

Are you ready?

“Ensure you have staff capacity to both collect and analyse the data for this evaluation – make sure that the value of it is well understood across your whole team and considered a priority, not just ‘nice to have’. Make sure team members are reminded of any tasks they may have. This is an ongoing process where momentum needs to be continued.”

“We have incorporated the use of set and variable KPIs into our exhibition policy for future exhibitions. This includes the use of the Evaluation Tool Spreadsheet as well as the qualitative data feedback tool supplied as resources by WLP.”

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Phase 2 – Weston Loan Programme evaluation

Ready to evaluate?

“We have introduced a new, earlier deadline for the setting of KPIs in future exhibition planning.”

“Having introduced new evaluation tools during this project for audience development, we will be able to continue to use these to build up our understanding of our audiences.”

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Getting ready – Staffing

- Teams, including marketing or education teams, are usually small and stretched to begin with: plan ahead for extra capacity to ensure you meet your ambitions
- Recognise it isn't 'business as usual'

1. While staff turnover was less frequently mentioned in Phase 2, the fact of people's time and resources being overstretched remained an issue. Teams, including marketing or education teams, are usually small and stretched to begin with, so this can impact museums' and galleries' ability to put in place actions that would help them meet their ambitions.
2. The message often seems not to have got through sufficiently in advance for the grant holder to make good provision for the extra work or to be able to protect the work conditions of their staff.
3. Though staff turnover was lower as a reported issue, it is still suggested that senior management teams could be encouraged to make more allowance for the pressures and workload caused by these exhibitions, rather than 'business as usual'. Sadly, in a small number of cases, the pressures of work over life balance proved too much and led to staff illness or departure.

Phase 2 – Weston Loan Programme evaluation

Getting ready – for evaluation

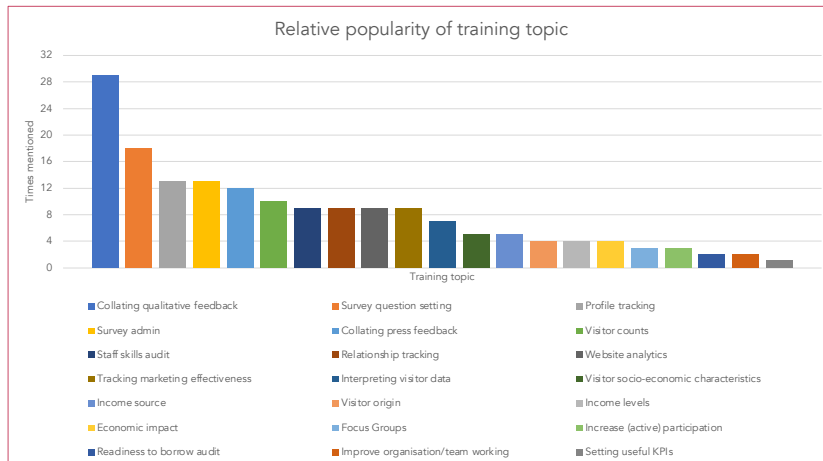
- Grant holders were supported to some extent to prepare for the evaluation (will be similar in Phase 3)
- Very few found time to refer to additional collated support links, much less to do additional specific training
- Those that did find it beneficial in running a robust evaluation plan
- One tool, for gathering qualitative visitor feedback from a variety of sources in one place, gave a much more rounded impression of visitors' experience
- Therefore, fed into improving visitor satisfaction levels, where used well

Rachel Escott, Creative Communications

1. The experiences reported in Phase 1 of the Weston Loan Programme resulted in a change to the way grant holders were supported to undertake the evaluation required of them.
2. Very few grant holders found the time or capacity to refer to the collated support links, much less to actually undertake additional specific training. The few that did so found it beneficial in being able to run a robust evaluation plan.
3. The greatest value that grant holders across the board gained from the advice surgeries was that I could explain in detail a toolkit for gathering together qualitative visitor feedback from a variety of sources. This would allow them to assess and learn from all sources in one place. With this tool organisations gained a much more rounded impression of visitors' experience of the exhibition and tracked feedback on particular themes of interest to them. It also provided a powerful tool for recognising and tacking action on such qualitative feedback, often during the course of the exhibition. It therefore was one of the tools that fed into improving visitor satisfaction levels, where used well.

Phase 2 – Weston Loan Programme evaluation

Getting ready – for evaluation



Rachel Escott, Creative Communications

Getting ready – for evaluation

- Main areas of training needed:
 - properly recording, analysing and drawing insights from all forms of qualitative feedback in a robust way
 - survey question-setting to tease out the information they really wanted
 - profile-tracking, as a combination of press coverage and other impacts
 - how to effectively run surveys for maximum responses
 - collating press and PR coverage
 - core skills for a marketing function (eg website analytics, interpreting visitor statistics and tracking marketing effectiveness)
 - core 'organisational viability' topics: conducting staff skills audits, tracking external relationships

Rachel Escott, Creative Communications

- How to interpret and draw valuable insights from qualitative visitor feedback was something nearly all grant holders felt unsure of. Much of my advice surgery time with each was given over to explaining tools and techniques for doing this.
- This included advice on properly recording, analysing and drawing insights from all forms of qualitative feedback in a robust way – that would be needed to, for example, answer the question about visitor satisfaction.
- Advice about another 4 topics was sought by around half of grant holders:
 - survey question-setting to tease out the information they really wanted (58%)
 - profile-tracking, as a combination of press coverage and other impacts (42%)
 - how to effectively run surveys for maximum responses (42%)
 - Collating press and PR coverage was something 39% of organisations had either not done before or felt they needed to improve.
- Other skills seen as core to a marketing function (eg website analytics, interpreting visitor statistics and tracking marketing effectiveness) were sought by some organisations that had not undertaken much marketing before.
- Some grant holders sought help with core 'organisational viability' topics such as conducting staff skills audits (29% of organisations) and tracking relationships with other partners, collaborators, or potential funders, also 29%.

Phase 2 – Weston Loan Programme evaluation

A final word (or two)

“Do it – do it well – even in a pandemic. People need this stuff.”

“If Weston Loans are available, absolutely apply. This made all the difference in covering costs of the loans and embedding better practices to help us do so in future.”

“The funding from Weston Loans helped alleviate financial barriers and concerns on behalf of the trustees. The unprecedented press coverage also demonstrated the benefits of staging exhibitions on this scale.”

Rachel Escott, Creative Communications