

Birmingham Museums Trust

Resilient Heritage: Laying Foundations

Brief for Evaluation

1. Background

Birmingham Museums Trust (BMT) is the charity that cares for the city's collection of 1m objects and nine museum sites on behalf of the Birmingham City Council (BCC). The collection is Birmingham's greatest cultural asset and a priceless resource for learning, creativity, health & wellbeing. Pre-Covid, 10m people experienced the city's heritage annually, as visitors, in outreach to schools & groups, through digital engagement or at venues across the world where objects were on loan.

BMT employs 153 full and part time staff and over 340 volunteers caring for and sharing the City's Museum collection with the public. Birmingham Museum & Art Gallery (BMAG) and Thinktank play vital roles in bringing schools, families, and visitors to the city centre. The Museum Collections Centre is our main store and is open to the public every week for behind-the-scenes access. Our six historic properties are popular community facilities with free-to-access green spaces, education, and creative opportunities. We actively reach beyond our sites to engage people across the city in their neighbourhoods.

In 2020, under the new leadership of co-CEOs' Sara Wajid & Zak Mensah, BMT began a multi-year transformation towards a world class, socially purposeful entrepreneurial museum rooted in the distinctive cultural heritage of the region.

Since BMT was established in 2012, its public funding has been reduced, with a 35% drop (excluding inflation) in regular revenue funding from ACE and BCC since 2015. More recently, BMT has seen a deepening of engagement with Birmingham City Council, and a £16m capital investment, funded by BCC and ACE MEND fund, in essential electrical and roof works at BMAG is currently in progress.

BMT received significant Covid Recovery Funding which provided an essential financial lifeline to survive the pandemic, however since then, rising costs and loss of earned income create significant financial challenges for BMT. Combined with the trust's vision of democratising BMT to enable many more people from more diverse backgrounds to enjoy their heritage, we are at a critical point of risk and opportunity.

A radical rethink of all aspects of the organisation is required to become financially sustainable and inspire a sense of hope and belonging, championing inclusion, creativity and social justice. BMT has begun to engage its trustees, workforce, stakeholders, community partners and the public. However, the trust now needs to make a more fundamental change in how it operates and functions, deepening our vision and translating it into an organisation capable of responding to the challenges and opportunities of 21st-century Birmingham.

2. BMT Vision

By unlocking Birmingham's cultural heritage with its citizens, visitors and industries, we want to create hope, social trust and belonging. We stand in solidarity on key issues that are meaningful, shaping the future of this diverse, creative and ambitious global city.

3. Laying the Foundations for the Transformation of Birmingham Museums Trust

Museums have been vowing to overhaul themselves in line with progressive social agendas for a generation, and mainly failing to deliver. Sara and Zak are the first job-sharing Black and Asian co-leaders of a major museum in the UK, are the only global majority leaders on the NMDC and they follow in the footsteps of the former BMT Director, Rita McLean who was the first Black museum director in the UK. Sara is the first British Asian museum director in the UK and together they are committed to re-shaping the museum using intersectional, feminist anti-racist principles of leadership. Their job-sharing leadership is not merely 'inclusive working practices' it is about confidently embodying and projecting a form of creative cultural collaboration and convivial multiculturalism (to quote Paul Gilroy's) which is distinctively Brummie.

This new project, starting in autumn 2023, is the first phase of a fundamental transformation of BMT to a resilient and financially sustainable organisation with the structure, culture, skilled workforce, and audience insights to deliver its ambitious vision. This first phase will lay the foundations - building insights, research and development that will shape the organisational transformation and help realise the vision of BMT for an open, participatory entrepreneurial and sustainable museums trust that plays a key role in the cultural and economic growth of Birmingham and the wider West Midlands region.

The Laying the Foundations phase includes:

- Organisation review and new business strategy development and working towards organisation transformation.
- Development of Theory of Change & Logic Model.
- Evaluation, including organisational culture and capacities baseline, creating an evaluation framework and a post project review.
- Existing and New Audience research.
- Development of Citizens' Jury to inform and shape BMT.
- Communication strategy and plan.
- Fundraising and income diversification strategy and plan.

4. The Opportunity

Birmingham Museum Trust is on the road to significant transformation. It is essential both for our own learning, and the sector's learning, that we are able to document and record our findings, learn and improve as we progress. We are committed to embedding new ways of working and are seeking external evaluation support to assist us in this process. As well as the longer-term focus, there are discrete requirements for the Resilient Heritage project we are about to submit to the National Lottery Heritage Fund for funding.

In order to evaluation the Resilient Heritage Laying the Foundation Project, we require the following:

- Baseline benchmarking of organisational culture and capacities, as early as possible in the project, to be repeated near the end of the project.
- Establishing the evaluation framework for the project – defining the what, how, when, who, and why of the evaluation and providing a toolkit that can be disseminated across different workstreams to ensure that all elements are evaluated consistently.
- Periodic evaluation reports – anticipated on a quarterly basis, this will ensure cyclical learning throughout, and enable conscious adjustments to be made to get the most out of the workstreams.
- Resilient Heritage Laying the Foundation – project review – once the core funded elements of the Resilient Heritage project have been completed, a post-project review will be required to be submitted to the NLHF in line with their guidance.

5. Baseline Benchmarking

A single staff survey or combination of survey and qualitative method like focus groups (with working circles or front of house staff, including questions about each element in the bid, including:

- Business Model Review - the baseline would assess the current state of the organisation, asking questions related to understanding of the vision, of BMT's strategy for achieving the vision, of how their day to day work is affected by the vision etc, as well as questions about the capacity, effectiveness and efficiency of the organisation.
- The Market Research brief includes a baseline survey of public perceptions of all BMT venues and what people expect from them. This will be a complementary baseline survey with questions about how well staff understand visitors and non-visitors, how confident they are in their knowledge of visitor and non-visitor interests, of how socioeconomic factors enable or create barriers to participation etc.
- Communication - this will be predominantly about internal communication and communication with key stakeholders, again there is a need to establish a baseline from which progress can be measured. It will address how well-informed people feel, what information they need and how they wish to receive it, and include definition of terms as below.
- Content & Participation Strategy - the baseline here would be about how confident people are about the definitions of key terms like Story, Engagement, Participation, Cross-disciplinary, inter-cultural etc. This would ask about all venues and collections.

6. Establishing the Evaluation Framework

This will be the first new piece of work by the Evaluation Consultant. There will be a fine line to tread in terms of developing the evaluation framework. BMT are keen that the evaluation is meaningful to them and their objectives to rethink traditional models but recognise that there needs to be a certain degree of alignment to be respected and accepted by some of the significant institutions such as NLHF, DCMS, ACE and the like. We therefore anticipate the framework to draw on industry standards such as 8 Principles of Social Value, as defined by Social Value UK, but also to provide new methods and means to measure success.

The framework should provide a toolkit to facilitate consistent data collection across the different projects and workstreams so that each project is enabled to collate their own resources to inform meaningful evaluation.

7. Periodic Evaluation and Reporting of The Resilient Heritage Laying the Foundation Project

- Progress Tracking Survey – this is to be prepared and issued at agreed intervals to identify strengths, weaknesses, opportunities, and threats to the approaches being taken and measure progress against the baseline.
- Interim reports – anticipated to be issued on a quarterly or 6 month basis, as is considered appropriate and meaningful, this should be an easy to digest summative report that highlights the key outcomes and actions from the survey for the respective workstreams to consider and implement in their methodologies, to incorporate the SWOT findings. We anticipate it following a format such as:

1. What we wanted to happen:

- Aims of the project.
- Why we undertook the project.
- What changes we envisaged happening.
- How much we expected it to cost.
- How long we expect the project to take.

2. What actually happened:

- Project management.
- Whether the original aims were justified in hindsight.
- Differences that the project made.
- To the community.
- To our visitors.
- To our staff and volunteers.
- To other organisations.
- To the environment.
- To the Trust.
- To our stakeholders.

- How much it actually cost.
- Whether it was completed on time.

3. Review

- Overall conclusions.
- What worked.
- What didn't work and why.
- How much would have changed even without the project.
- What we might do differently next time.
- How this will influence other projects at the Trust.

8. Post Project Review

A systematic review will be carried out when the project is complete to:

- a) assess outcomes against project objectives.
- b) inform approaches and standards for future use.
- c) lead to improvement in project management, procurement, and other procedures.

The post-project review will address the following workstreams and support functions:

- Business Strategy
- Market Research
- Theory of Change
- Citizen's Jury
- Fundraising
- Communications
- Project Management

9. Timescales

We anticipate the work being completed in four stages:

- Review the baseline and establish the framework by 31st May 2024
- Evaluation of first six months to be issued by 6th September 2024
- Evaluation of second six months to be issued by 21st March 2025
- Final report to be issued to NLHF by 28th March 2025

There is flexibility in these timescales but above gives broad expectation that aligns with the other development work.

10. Budget

£10,000 excluding VAT but including expenses. There is a separate small budget for events if needed to support this work and data gathering.

11. What we're looking for:

The collective team will bring to the table big ideas and ambition that creatively respond to the vision, unafraid to challenge accepted norms, collaborating to support the client in further refining their vision and objectives, rooted in community needs. The team should have a strong sense of Birmingham and its unique characteristics and super-diversity.

You will need to have a deep understanding of this area of work, but you do not necessarily need to be a bricks and mortar consultancy firm. We welcome responses from individuals, companies, or collaborations.

Ultimately, we do not mind who you are (although if you are not based in the city, we hope that you would see the benefit of spending ample time here to get under the skin of its residents). Our teams are diverse, as is our city, and your work will recognise, celebrate, and respond to this.

We want you to understand our passion for change, appreciate the exploratory nature of this work, and be robust and brave with your assertions.