

Birmingham Museums Trust

Resilient Heritage: Laying the Foundations

Brief for Business Strategy

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 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 which will include:
- 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

This is a challenging but exciting time for Birmingham Museums Trust and radical organisational change is needed to make positive change happen. We must evolve our organisational structures, decision making, tools and skills to ensure our business model is fit for purpose and able to deliver the new vision, approach and objectives in a participatory and dynamic way. We are committed to embedding new ways of working to create this essential transformation and are seeking external support to assist us in this process.

As the introduction above demonstrates we have spent two years realigning how we operate in the new post-covid climate. Next steps are to break the challenging cycle of decreasing funding from traditional sources and ever rising prices across the board. We also want to change what a museum

trust looks like and how it serves its community. We know that we must move at pace. However, we must do so while first navigating the immediate impact of Birmingham City Council's financial circumstances.

Birmingham Museums Trust has been a trust since 2012, with the operation of the museums formerly sitting within the City Council, and runs nine sites across Birmingham - Birmingham Museum & Art Gallery (currently closed and due to reopen partially in 2025⁴ with a fuller reopening in 2027-28), Thinktank, Museum of the Jewellery Quarter, Aston Hall, Sarehole Mill, Soho House, Blakesley Hall, Weoley Castle and the Museum Collections Centre (Museum of the Jewellery Quarter and Soho House currently remain closed). This is a varied portfolio, incorporating several listed buildings; a 1.5 hectare museum collections store; and the ruins of a former manor house. The Trust is one of the only cultural providers within the city with significantly limited resources compared to the other UK core cities, there is a critical reliance on the provision provided across our properties and programmes.

Approximately 50%-60% of annual income is from public funding with a goal to decrease this reliance overtime by increasing trading, philanthropic and partnership income. Birmingham City Council own 8 of the 9 buildings and the collection. Our target is to reduce our core operating to a significantly lower percentage from public funding in the next 10 years - this target is to be agreed based on the findings of the research and what is deemed feasible.

BMT operates a challenging budget considering the value of the trust as a museum provision, that has seen standstill public investment and is stuck in a vicious cycle of reducing budgets and increased costs, as much of the sector is facing. As Birmingham City Council, our principal stakeholder, responds to the impact of Section 114, we are in an exceptionally changeable and uncertain situation.

BMT's engagement activity is already far reaching across Birmingham through projects such as the co-produced We Are Birmingham exhibition as part of the We Don't Settle programme. The ambition is that BMT's role is not only that of a guardian of a world-class collection, but of an active contributor to social change; forging links between past, present and future in ways that inspire creativity, hope and trust.

It is intended that the redevelopment of Birmingham Museum and Art Gallery will be the subject of a Heritage Fund bid and other fundraising in the future to enable a full reopening that is in line with BMT's vision, beyond a potential, initial partial reopening from 2024.

The current Thinktank lease expires in 2029 and a Feasibility Study has already been completed laying the foundations for the Birmingham: City of Ideas project. This will see the democratically co-produced development of both a city centre venue to house and display the large objects collection and other significant items, and also a dispersed model that will enable mass participation across the neighbourhoods of Birmingham.

The Museum Collection Centre (which is also an accredited Museum in its own right) has a redevelopment programme outlined that is waiting to be developed through the RIBA Stages, including some significant refurbishment and reconfiguration work to take this forward for the future and open it up to greater use.

A condition survey has recently been completed for each of the historic properties and further thinking is now required to consider how these should be managed, maintained, and developed into the future to ensure they remain sustainable and meaningful to the people of Birmingham.

Given the wide-ranging nature of BMT's estate and the different stages and states that the assets are in, alongside the sector-transforming direction the Trust wants to move in, becoming for the people of Birmingham, must set out clearly where the trust will be by 2030.

5. The Deliverables

This work is the central pillar of our Laying Foundations project and will be informed by the other strands of work to be commissioned, including Audience and Market Research, Citizens Jury, Fundraising and Communications. The appointed consultant will be expected to integrate work from these strands and work collaboratively with both BMT and additional consultants.

You will work closely with us, and while they are accountable for this work, you should not constrain your engagement with us to our leadership team alone. In line with our transformation to a more democratic organisation, we expect you to model that in your approach to this brief, engaging with our people across the organisation to inform your ideas. That could be en masse at an all staff open space event, or through more focused means; you may have other ideas, but it is key to this work that you work with our organisation as a whole.

We anticipate the Business Strategy being developed in three parts:

- i. A Theory of Change to enable decisions about prioritisation or effective evaluation of the resources and activities that have been identified with existing experiments into Logic Models
- ii. Independent audit of the current status of BMT – drawing on the existing information and benchmarking against the initial findings of the Market Research, this will provide a baseline and independent assessment of the status quo and identify the strengths, weaknesses, opportunities, and threats of the current situation. It will be essential to provide external validation and substantiation to our forward plans.
- iii. Business Strategy – we are evolving our decision-making processes into a more democratic structure and creating leadership within the organisation that is fit for delivering our Vision, such as the creation of new posts including Assistant Director, Transformation and Director of Enterprise & Innovation, along with the establishment of a Citizens' Jury amongst many other things. We need to take this to the next stage, but to do so, must navigate this immediate period of risk.

We propose that the approach to developing a business strategy is split into two phases:

First: a two-year transitional strategy that takes us to the end of FY 2025 / 26 and responds to the more immediate environment in which Birmingham Museums Trust operates, supporting us in navigating this exceptionally challenging period, while doing so in a way that consolidates where we are, responds to the immediate context, while positioning ourselves for future growth. This coincides with our current funding round from BCC and ACE NPO. We anticipate this as an emerging, agile, and responsive strategy that supports a turnaround period for BMT while remaining true to our vision, and establishing a direction of travel that allows us to build.

Then: a five-year strategy that looks beyond our current context and takes us to 2030 and beyond, moving us from reactive to proactive, and from turn-around to growth. We need to ensure that a dynamic but robust organisational framework is in place that frees us up to drive

forward the Trust's ambitious people-focused vision, while ensuring that we are resilient and financially sustainable – we seek not just to survive, but to thrive. This strategy will respond to and build on the various other parts of the Laying Foundations project. It will cover all sites, an create one clear, accessible 'go-to' document that forms the strategy for the Trust, guiding all activity across our portfolio.

There should be a clear plan as an outcome of this, which bridges the gap between, and informs going forward, our activities so that it is aligned with and works to the delivery of our vision, and allows ALL our people – whether staff, freelancers, volunteers, or consultants – to recognise themselves and what they do.

We envisage the work will be broad ranging, drawing on much that has already been reviewed and achieved, and responding to the outcomes of other strands of the Laying Foundations project. We also envisage – in responding to our current context – that this will be a flexible response that will develop.

The below is therefore not prescriptive, but an indication of our current thinking of this time, of what this work will include:

- While we will remain a charity, review of work undertaken on our governance structure, and consideration of the governance structures underpinning other dynamic organisations, with comparator research going beyond the museum sector, drawing in knowledge of community-representative, people-focused, leading organisations nationally and internationally.
- Exploration of how an evolved governance structure will work in practice e.g. legal, reporting, communications channels, feedback, mitigating risk, succession planning etc
- Set of recommendations on what we need to do to evolve and create a more participatory governance framework that includes an agreed organisation-wide approach of monitoring success and risk during and after projects or activities have been completed.
- interpreting the benchmarking with other large cities' museums in the UK (e.g. the 11 Core Cities) (given that Birmingham has the lowest ratio) that has been completed as part of the Market Research and what this could mean for BMT.
- The potential return on investment from current and possible increased levels of revenue, as well as maximising the use of our Trading arm. The ROI should consider not only financials, but estimates of the value of culture, social, and wellbeing.
- Assessment of existing skills and experience across the organisation including the board and identification of any additional skills and experience that will help support the new vision.
- A review of our people, helping us to understand the skills, capacity and roles needed for a new model
- Recommendations for how we transition smoothly from existing to future structure, particularly reflecting on how our structure may need to respond during the transitional period, and then develop beyond this
- External environment factors that may impact on our direction (emerging trends as spelled out by ALVA, ONS and others about how people spend their time and money since covid).
- Underpinning all of this is the financial resilience and how we reduce our dependence on public funding.

The strategy for the transitional period is expected to be responsive, and scope for the strategy for the growth period should be allowed to develop further.

However, the Business Strategy may include:

- Brief overview of the Trust's position, vision, and objectives. A clear explanation of our strategic working model and what strategies exist and their complimentary or respective action plans.
- Wider context and how all sites will need to evolve their activities to contribute towards the new vision and objectives. This will be developed in collaboration with the BMT team but will need to be captured within the Business Strategy.
- Exploring how the vision may affect visitor numbers to each site, with new visitor projections developed for each. Crucial to this is considering how each site supports a dispersed model – visitors may be those crossing the threshold but may also be those engaging with the Trust in a different way.
- Outline income and expenditure profiles, with new income generating streams proposed to enhance our resilience and long-term financial sustainability.
- Further exploration of BMT current business structure and VAT status to identify any opportunities for future reduction in unrecoverable VAT - this may need to be supported by further specialist support.
- Explore the value and purpose of the collections and historic buildings in supporting the vision of the Trust, and how we can maximise the potential of this resource either ourselves or working closely with partners (both charitable, social and business).
- Review of staffing and volunteering needs and opportunities.
- Risk table capturing all risks across the portfolio.

6. Existing information

We have the existing information that we will share with the successful tenderer:

- Draft Strategy Tree / Framework Summary
- Formal organisational structure, and experimental phase of sociocracy / working circle structure
- Estate Development Strategy.
- Birmingham: City of Ideas Feasibility Study.
- Masterplan and development plans for Birmingham Museum and Art Gallery.
- Museum Collections Centre Feasibility Study and previous Options Appraisals and supporting information.
- Historic Properties Condition Survey and Management and Maintenance Strategy.
- Information on the Dynamic Collections programme, a participatory approach to the care, management and use of collections.
- Annual accounts.
- BMT VAT advice previously commissioned.
- Experimenting with sociocracy for consent-based decision making.

Other documents as become apparent.

7. Timescales

Commission is expected to commence 11th March 2024. We are seeking an outline summary of findings and propositions by 6th September 2024 with a focus on the transitional period, with final draft of the full Business Strategy to be delivered by end of 7th February 2025 for review and feedback

before final approved version to be issued 7th March 2025. We anticipate feeding into the briefing of the Market Research and other workstreams, and then as these begin to progress and findings emerge, this will inform and shape the Business Strategy and action plans.

8. Fee Budget

£60,000 - this should include travel and expenses but excluding VAT. Payment stages to be agreed with the chosen consultants. The Consultant(s) is expected to tailor their work to the demands of the programme and some occasional evening working may be required.

9. 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.

APPENDIX: ADDITIONAL INFORMATION ON THEORY OF CHANGE

We are incorporating our requirement for a Theory of Change into our Business Planning work, as we see this to be a critical dependency, and want to ensure seamless integration of this into the Business Planning process. However, we recognise that consultants may require to seek additional support in the delivery of the Theory of Change and provide the following additional guidance to support this. Note that we have previously estimated the cost of the Theory of Change work independently at £5,000 – the cost of this is now incorporated within the budget for the Business Planning brief.

Birmingham Museum Trust: Threats and Opportunities

Birmingham has the youngest population of any large European city and is one of the first minority-majority cities in the UK. It also has above average levels of poverty and deprivation and has the lowest level of museum provision (per 100,000 people) of the UK's ten Core Cities. Pre-COVID audiences did not reflect the city's demographic, with poor, poorly educated people, people of colour and disabled people significantly under-represented. Their cultures were also under-represented in the museum, as were the creative and heritage cultures of this young city. While we get a million visits across our nine sites, audiences have not returned to pre-COVID levels and BMT could easily, and within a generation, sink into irrelevance. Combined with severe financial problems, these mean that BMT needs to reinvent itself completely, with as dramatic an intervention in the life of the city as BMAG was when it opened in 1885.

While we are inspired by the Victorian heritage of ambition and belief in progressive public service embodied in the museum, we wish to move away from the paternalistic and hierarchical elements of that legacy, creating a radically democratic museum service. To do this, BMT aims to take a leadership role in the city, promoting a place-based sense of belonging and a 'convivial multi-culturalism' which emphasises what is shared, while also celebrating positive differences and facing up to negative heritages. In pop-up displays in 2022 BMAG showed a capacity to attract younger, more ethnically diverse audiences along with those who identified as disabled. We will use the ToC to identify critical success factors so that we can systematise and extend this success.

Credible, Evidence Based Interventions

We are aware that these are ambitious aims for what is, in a city of over a million people, a very small organisation. We will therefore be as rigorous and evidence-based as possible in all the services we provide, targeting our resources where we are most likely to have the greatest impact. BMT plans to set up a Cultural Citizenship Research Centre to embed this approach in all our work, with a strong focus on action research. We have already experimented with Logic Models, and while these link resources and activities to our intended outputs and outcomes, they do not state how these activities achieve their goals clearly enough to enable decisions about prioritisation or effective evaluation. To do this, we need a Theory of Change (ToC) which will:

1. Make explicit our assumptions about the cultural, social, and psychological mechanisms by which our interventions will achieve their intended impacts.
2. Identify the pre-conditions which need to be in place for our activities to be effective in engaging our target audiences, recognising the realities of life in Birmingham (e.g. awareness of museum activities, social acceptance within target communities of museum visiting, accessible public transport etc).
3. Identify the partners with whom we need to work to create the necessary pre-conditions.
4. Identify which of the mechanisms and methods for creating pre-conditions for engagement are supported by existing evidence and which require to be tested.

5. On the basis of 1 to 4 above generate a series of hypotheses about which activities are both practical for BMT and most likely to be effective, and which are most likely to generate the most effective strategic partnerships.
6. Draft metrics for testing the above hypotheses.
7. Revise the existing logic model in the light of the above.

Culture Change within BMT

As part of our ambition of democratising BMT, we wish to become a more useful, outcome focused organisation. By creating a ToC, we will not only become a more strategic and impactful organisation, we will support staff in developing critical thinking and reflection about their work and their role in the organisation as a whole.

The ToC will clarify our own thinking before testing it more extensively with partners at a later stage. This first iteration is focused primarily on BMT staff, but will engage key partners who need to be involved in this foundational stage. These include NLHF, ACE, Public Health Birmingham, West Midlands Combined Authority Cultural Leadership Board and Culture Central. Involving these key stakeholders will further recognition of BMT as a sector leader and build credibility in the mutual working to translate strategy into activity.

Outputs

- Theory of Change in narrative form.
- Visualisation of Theory of Change.
- Metrics for evaluation of BMT's effectiveness.
- A revised logic model to enable implementation of ToC.