

Invitation to tender: We are recruiting a Learning Partner for Barrow Cadbury Trust's Economic Justice Programme

Background

Barrow Cadbury Trust is an endowed foundation, committed to bringing about socially just change. While it uses its grant-making capacity to support other organisations, it is not primarily a grant-maker. Instead, it is a change-maker using all its resources – its endowment, staff, investment portfolio, experience and reputation – to create change through partnership with others.

The Trust has recently undertaken a strategic review, with Trustees deciding that its Economic Justice work should be focussed on Birmingham where the Trust has historic roots and where it is already undertaking place-based activity. Trustees further agreed that the programme should be co-created with local partners, and over the past year the Trust's staff team and local Advisory Group¹ have been developing ideas for the programme. We are currently working up several streams of work with the intention of creating a movement of people from across Birmingham who, in different ways, wish to influence how Birmingham's economy is structured and managed to increase economic justice. The various relationships and strands that we are currently working on are illustrated later in this paper.

Trustees anticipate a programme budget of approximately £500k p.a. though budgets are agreed annually so this may change. The current strategic period continues to March 2027.

We wish to recruit a Learning Partner to work with us for the remainder of our current five-year strategic period (to end March 2027), supporting us and our partners to learn from and help us iterate the programme as we go along, so it has maximum impact.

What are we looking for from our Learning Partner?

Our vision for the Learning Partner relationship is that it will be an engaged one, helping us reflect on our processes and the impact we are achieving. We are looking for a learning facilitator, not "just" an evaluator (though assessing the successes and failures of the work will be an important element of the Learning Partner's role). We want the learning to be co-created with the Advisory Group and others both inside and outside the programme. We expect the Learning Partner to work with the Advisory Group, attending its meetings at regular intervals, observing programme activities (where appropriate) and engaging with those participating in the different strands in order to find out what is important to them and to ensure learning is shared. We expect the process to be iterative, and for our learning to feed into how we develop and deliver the different strands of work. We are looking for something more than a standard evaluation: we hope that our learning partner will walk alongside us and our partners as we deliver the programme, learning with us about what works, reflecting on how we approach systems change, and helping us collectively to achieve maximum benefit over the next four years.

¹ B:rap, Birmingham Race Impact Group, Birmingham Settlement, Economy, i-SE, the Centre for Local Economic Studies, The Equality Trust and Thrive Together Birmingham.

We want a partner who has creative ideas and who will be able to draw on the different skills and experience of those involved in our Economic Justice programme to capture learning. For example, one of our partners is training Community Reporters to capture stories. Another has experience of the value of peer research, while a third used performance arts for high-impact illustration of individual stories. We want to leave our participants stronger as a result of engaging in the Economic Justice programme – being involved in capturing learning may be one route to this for some.

Embedding and disseminating learning is important to us – we want to leave a legacy of learning beyond the ending of any individual strand of our programme. We are interested in our prospective partner's approach to this, recognising that additional resources will be needed for communications across the programme as a whole and are outside the brief of this tender.

What do we mean by Economic Justice?

When we talk about economic justice we are talking about fairness, equality and people having enough money to live to a decent standard. It's about everyone benefitting from local economic growth, not just those who are in positions of power. It's stopping the trend we've seen over the past few decades of a growing gap between rich and poor. It's changing our social and economic structure so that people aren't disadvantaged by their gender or ethnicity. It's about clean air, good public services and more equal life chances.

The way Birmingham's economy is structured does not deliver economic justice. There are areas of persistent poverty, wide disparities between the most and least affluent sections of the population and, as in other areas, structural racism, sexism and other –isms prevent many people attaining a decent standard of living and leave others ill-rewarded for the work they do.

Statutory agencies recognise the long-standing problems of economic exclusion, and their strategies² reflect a desire for change. However, things are not moving far or fast enough, and new solutions are needed.

We think economic justice means:

- Everyone in Birmingham has sufficient material resources to have a fulfilling, sustainable life, free from concerns about meeting basic needs (some people call this economic wellbeing);
- Structural barriers resulting from an individual's ethnicity, disability, gender, other protected characteristics and socio-economic status are removed;
- People at risk of or experiencing economic injustice influence decisions about the local economy.

² For example <https://www.wmca.org.uk/media/3izov5z2/inclusive-growth-decision-making-toolkit.pdf>, <https://www.wmca.org.uk/assets/newsroom/5282/growing-the-social-economy-in-the-wmca-area-report-1.pdf>, https://www.birmingham.gov.uk/downloads/file/21159/birminghams_levelling_up_strategy.

We will be assessing the success of our Economic Justice programme against these three outcomes but want to do more than track what we are achieving: we are intentionally embarking on a learning journey about how to create change through an interconnected programme of activities. We want to co-create learning with those involved in our activities and ensure - as far as we are able - that learning is embedded in Birmingham. We want the record of our journey to be a living, breathing thing, not a document to be read and filed away.

Barrow Cadbury Trust's Economic Justice programme

As mentioned above, our Economic Justice programme will have a number of different strands. This approach is intended to support a diverse range of people with varying lived and learned experience to create change to how the city's economy operates, and to reduce inequality. We hope to catalyse a movement of people and organisations committed to and engaged in systems change, who together will form our larger Alliance. We expect different people to engage in the various different offers that will comprise the programme, but at the heart is the Action Network, as illustrated in the diagram below. The various elements of our thinking to date are at different stages of development so the details may change, but the current state of play on each one is briefly described below.

Action Network: A network of individuals with ideas and energy to create change. We will ensure that the membership is diverse. We are not sure at this stage how large the network will be but expect it to be in the range of 20-40 people. We hope it will include those running disruptive social enterprises, systems thinkers, people working in statutory organisations or major anchor institutions, people working in the voluntary sector and individuals who want to use their personal experience of economic injustice to create change for others. The network will be a place for exchanging ideas, for learning and for developing plans and partnerships for systems change. We aim to create an inclusive culture with an overtly anti-racist approach. We have appointed Huddlecraft to facilitate the network and it will have its first formal meeting in September.

Grassroots influencers: One of our partners (Economy) is currently working up a proposal for people wishing to use their lived experience to influence change. This is likely to involve an initial programme of sessions intended to increase understanding of the economy and to build people's confidence, connections and a sense of personal agency as both an economic actor and a change maker. These sessions will be followed by a longer period in which those who are interested in taking it further are supported in actions to create change.

Organisers: We have awarded a grant to NEON to deliver a Transformative Organising programme for activists in Birmingham. The programme is in development and will be delivered later in the year.

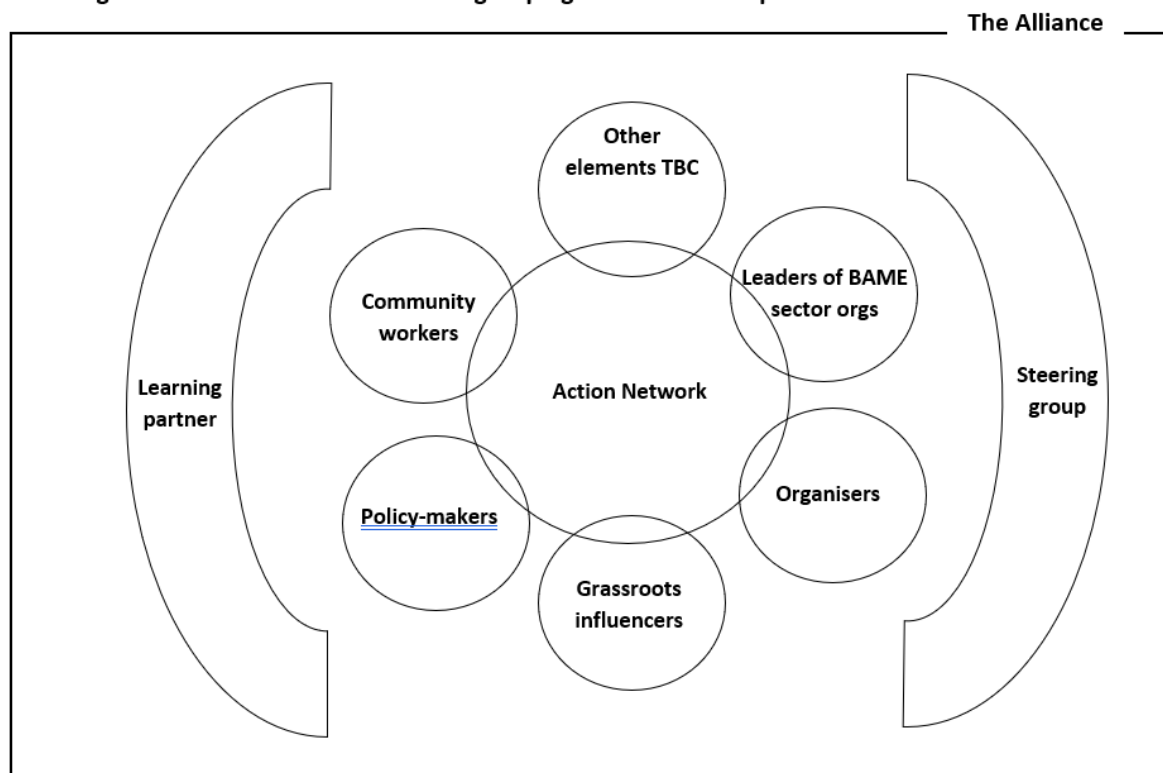
Policy makers: Thinking here is at an early stage – we are exploring how to work with the power-broker side of the equation to create conditions and open-mindedness to change. The cohort we are looking at will be drawn from manager/senior manager level in local statutory agenda. We hope some will be inspired to join the Action Network.

Community workers: Just an idea at present - the proposal is to integrate thinking about social and economic justice, and how to achieve it, into training for people working in the voluntary sector.

Leaders of BAME sector organisations: We have funding available to support leaders of small organisations run by and for people from racialised groups.

We expect other elements to be incorporated as the programme proceeds and gaps/opportunities emerge, but the above elements give a flavour of the kinds of things we think the programme might include. Our initial Theory of Change can be found in Annex 1.

Birmingham Economic Justice Alliance – groupings and relationships



Our values and principles

The Advisory Group has not yet developed and adopted a formal set of values and principles. However, the following have been recurring themes of our discussions:

- Working collaboratively, respecting the views of others and seeking common ground;
- Developing a programme of work that addresses root causes of injustice, rather than treating its consequences;
- Understanding that the current systems, patterns and inequalities in Birmingham's local economies are the product of local and wider history, and that we cannot find solutions to economic injustice in the city without understanding its causes;
- Committing to anti-racist, anti-sexist and anti-ableist practice and to inclusion of a diverse range of experience within the Alliance and its component strands of work;

- Respecting both lived and learned experience — recognising the contribution each has to creating change, but believing that solutions to economic injustice cannot be found without people experiencing those injustices being in a position to influence change;
- Recognising the paramount place relationship-building, particularly between people experiencing economic injustice and those in positions of power, has in creating change;
- Seeking to learn from our programme and to share that learning with others inside and outside the city, recognising that there may be false starts and wrong turns, but that these are at least as important for learning as things that go well.

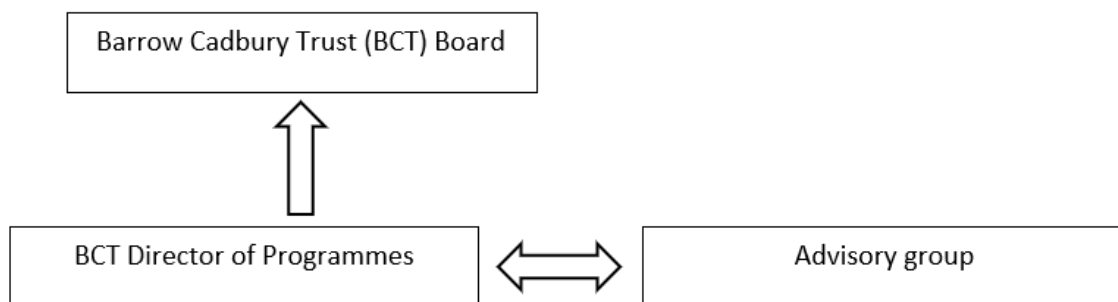
Our approach shares much in common with movement building, in particular we seek to:

- Engage a diversity of voices and approaches - the Action Network and our various strands offer different activities to different but overlapping groups;
- Build capacity and capability for catalysing change through providing formal learning experiences and peer exchange;
- Foster interconnections and a sense of a community of people with a shared aim, though perhaps different means of achieving it;
- Support change-makers that share our aims.

The Trust sees its role as convening and nurturing these aspects. We have a programme budget, currently around £500,000 per year (though this may change in future years) that will support the activities listed above and others to be determined.

Governance

Day to day management of the programme is the responsibility of the Trust’s Director of Programmes. She supports and is supported by the Advisory Group and is accountable to the CEO and Board of the Trust. The Advisory Group was established to provide expert input and local experience to shape the programme. It has been meeting monthly during the ideation and start-up stages. We plan to review membership and terms of reference in the autumn once the Action Network and other strands are established.



Key deliverables

In the early stages of the partnership we would like the Learning Partner to co-create, with the Advisory Group and potentially others, an inclusive process for learning. We will also need a method of assessing the success of the programme. We expect this to include both *process* measures (for example the extent to which new relationships have been forged) and baseline and interim *outcome* benchmarks, measurements and metrics, against which to measure progress both in the programme as a whole and its various strands.

Once the programme is under way, we want the learning partner to track:

- The narrative of programme development and delivery.
- Real time stories of progress and change – and stories of where change has not been achieved, recognising that it is vital to share learning from things that don't go as expected.
- Indicators that the programme is or may be on the way to reducing economic injustice– and if any benefits are being felt across Birmingham's diverse communities.

We recognise that four years is a very short time in which to achieve structural or systems change, so much of the focus of measuring success is likely to be on assessing whether the conditions are in place for longer-term change.

We expect the Learning Partner to provide:

- A creative, constructive approach to learning that engages a range of people connected to the programme, including those experiencing economic injustice.
- An account of the learning and development process within the project, and how this affected/altered goals, expectations and the focus of activities over time.
- Regular reports on learning – a minimum of yearly formal interim reports plus informal feedback, plus a final report at the end of year 4 of the programme (2026-7).
- Support for learning across the project strands, the nature, details and audience for which will be agreed between the Learning Partner, Advisory Group with input from strand participants.

We will work with the selected Learning Partner over the first few months to develop the key deliverables (which may be different for the different project strands) and a learning framework. We hope to draw on our partner's experience of working on equivalent programmes to develop our ambition and think about how best we can both achieve our goals and derive maximum learning for ourselves and others that has a legacy beyond the four years of this tender.

Learning Partner connection to Birmingham

We consider that an understanding of Birmingham and local connections is essential to the delivery of the brief. In addition, we want wherever possible for our programme spend to benefit Birmingham's economy. We will therefore only be able to consider applications from

Birmingham-based individuals or organisations, or partnerships where the work will largely be delivered by a Birmingham-based partner, member(s) of staff or associate(s).

We welcome applications from individual organisations and partnerships.

Budget and timeline

The learning partnership is expected to continue for up to four years, ending on 31 March 2027. We have set an indicative budget of up to £125,000 including VAT for the learning partnership itself but are open to discussions with the successful partner about the added value that might be achieved with an uplift of up to 25% in the budget. We recognise that learning activities, for example bringing groups of participants together for shared learning or specific training, may require additional funding, for example for travel, premises hire or recognition of time spent by unwaged/low income participants. A separate budget for these, which will be held by the Trust, will be ring-fenced once a programme of activities has been agreed with the Learning Partner.

We welcome expressions of interest by [date]. Your proposal should be no longer than 8 pages long and should cover:

- Your understanding of the principles, approach and desired outcomes of the programme.
- Your experience of undertaking similar briefs and your knowledge of movement development, systems thinking and a range of models of evaluation, including links to any publicly available material you have produced.
- The approach you would take to delivering this brief, including your initial thoughts about your interactions and relationships with the Trust, Advisory Group and programme participants.
- Initial ideas about how you would measure “success” – of process and outcomes
- Your ideas about creative, innovative or collaborative ways of capturing and sharing progress and learning. We would like this to include co-creation of content with those with personal experience of economic injustice.
- Evidence of your commitment to anti-racist, anti-ableist and anti-sexist and non-extractive ways of working as demonstrated by the approaches you have taken to previous commissions and your organisation’s or your personal wider DEI practice.
- Your understanding of what it means to be a “critical friend”, the benefits and risks of such a relationship and how you see it working in practice.
- Any ethical or confidentiality issues you anticipate in working with a complex and inter-related set of activities, and how you will address them.
- A budget with costings under principle budget headings. Please build a reasonable margin for inflation into the budget and include the rate(s) you have used.
- Clearly distinguished accounts of what could be achieved with the indicative budget, and additional value that would be created with a modest uplift of up to 25%.
- Short CVs and day rates/salary scales for each member of the project team.
- A note of the key risks you anticipate with the project and how you will mitigate these, including your approach to safeguarding.

We will shortlist up to three potential Learning Partners to present their proposals in person in Birmingham on [date]. We expect the sessions to be interactive, to give us a flavour of how you propose to work with the Trust, Advisory Group and partners in the programme.

Apply to Debbie Pippard, Director of Programmes, Barrow Cadbury Trust
d.pippard@barrowcadbury.org.uk. The deadline for receipt of applications is x

The timeline for decision is:

- 10 July: Tender published
- 18 Sept: Closing date for receipt of applications
- w/c 25 Sept: Shortlisting
- 3 Oct: Interviews

Annex 1: Theory of Change

What is the problem we are trying to solve?

Economic and social inequality and exclusion is high in Birmingham. Many people at the bottom end of the income scale lack resources (money, housing, education etc.) needed for a decent sustainable standard of living. Some population groups (for example Black and minority ethnic people, women, those born into poorer families) are more at risk than others as a result of Birmingham's social history and how society and our economy (nationally and in Birmingham) is structured, including the legacy of colonialism. People negatively affected by income and social inequality do not have enough opportunities to influence decisions affecting the local economy and economic justice. Big changes in our economy (e.g. Government drive to Net Zero) may fail to solve or even exacerbate existing inequalities.

What resources do we have?

- Experience and expertise of development group
- Experience and expertise of others in Birmingham
- Barrow Cadbury Trust programme budget and national connections
- Existing relationships with some of those we wish to influence
- Potential to learn from others doing similar work in other places

Activities

- Developing understanding of causes and solutions to economic injustice in Birmingham
- Building a network and movement of organisations and people interested in improving economic justice in Birmingham
- Funding and learning from action research and other projects experimenting with ways to improve economic justice
- Funding effective/innovative/sustainable work that enables people affected by economic injustice to influence policy and decision-making.
- Particular focus on colonial legacy and structural racism and gender inequality
- Building relationships with decision-makers – focus on 'ears' as well as 'voices'

Outputs

- Programme of meetings and events to build links between those interested in increasing economic justice
- Cadre of activists developed that can advocate on behalf of selves and others
- A range of development/support offers for different groups of economic players
- Pilot projects, change programmes etc if they emerge from the networks
- Sharing learning with others outside Birmingham, especially national level.

Intermediate outcomes

- Activists and organisations better connected
- Discernible impact of work on decision-making, systems and structures
- Co-development of systems and structures by statutory/other organisations and those experiencing economic injustice
- Challenges of moving to net zero/sustainable economy do not disproportionately disadvantage those already experiencing economic injustice

Goal 1:

Everyone in Birmingham has sufficient material resources to have a fulfilling, sustainable life free from concerns about meeting basic needs.

Goal 2:

Structural barriers to a achieving a sustainable life resulting from an individual's race, disability, gender, other protected characteristics and class are removed.

Goal 3:

People at risk of or experiencing economic injustice are able to influence decisions about the local economy.

Who are our key audiences?

- Council, WM Mayor and Combined Authority, other big statutory organisations
- Commercial sector in Birmingham
- Voluntary, community, social enterprise and faith sectors
- National government