

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

### **The Opportunity in Summary**

We wish to appoint a new Learning Partner to our Economic Justice (Birmingham) Programme, to track learning outcomes for the period to the end of March 2027, supporting us and us and our partners to learn from and iterate the programme as we go along so it has maximum impact. 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 lifetime of the programme and beyond.

The following document covers the background to the programme and our Learning Framework, our intended outcomes, and provides an overview of the detail required in any proposal submitted.

We expect the Learning Partner to:

- Have a creative, constructive approach to learning;
- Be based in Birmingham;
- Demonstrate a broad competence and understanding of DEI practice; and,
- Be prepared to operate in an engaging, collaborative, innovative manner with the different groups within the EJB movement.

We will shortlist up to three potential Learning Partners to present their proposals in person in Birmingham on 9 April.

Apply to Debbie Pippard, Director of Programmes, Barrow Cadbury Trust [d.pippard@barrowcadbury.org.uk](mailto:d.pippard@barrowcadbury.org.uk). The deadline for receipt of applications is 09.00 on 3 April 2025. We expect the selected partner to start work in April 2025.

### **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.

Our Economic Justice (Birmingham) programme has been co-developed with a local Advisory Group<sup>1</sup> with the aim of supporting the development of a movement of people from across Birmingham who, in different ways, wish to influence how Birmingham's economy works, to increase economic justice. We have adopted NEON's movement building framework, illustrated in annex 1, which identifies three types of activity that are needed for a movement to succeed. Annex 2 shows the relationship between our programme and the wider community of those working for movement for economic change in Birmingham.

Trustees have committed to allocating around £500,000 p.a. to the programme for the remainder of their current strategic period (ending March 2027) though they expect to continue supporting the work at a similar level beyond that.

In 2024 we appointed a Learning Partner who worked very successfully with us on our Theory of Change and learning outcomes. Unfortunately, due to circumstances outside their control, they have had to end their tenure. We wish to appoint a new Learning Partner track those learning outcomes for the period to the end of March 2027, supporting us and our partners to learn from and iterate the programme as we go along so it has maximum impact. Our original Learning Partner will be available to ensure smooth transfer of the approach we have collectively designed. Their Learning Framework is attached verbatim as annex 3 but we understand that a new learning partner may wish, in consultation with the Trust and our advisory group, to make adjustments to reflect their personal approach and ways of working.

### **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 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 our funded partners 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 various aspects of our programme. 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.

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. We aim 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.

A learning panel of six people living with economic injustice have helped us with development of our learning outcomes and theory of change. The panel was recruited by our original learning

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<sup>1</sup> Representatives from B:rap, Birmingham Race Impact Group, People's Economy, i-SE, the Centre for Local Economic Studies, The Equality Trust, NEON, Huddlecrafft, Thrive Together Birmingham and individuals currently experiencing economic injustice.

partner and its members have been trained in both the aims of our programme and in methods of evaluation and learning in complex systems change. It meets six-monthly and has been a sounding board for development of the learning outcomes and theory of change. We are interested in how our new partner would work with the panel, should it continue to meet.

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 everyone having access to 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 strategies<sup>2</sup> 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.

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 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.

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<sup>2</sup> 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](https://www.birmingham.gov.uk/downloads/file/21159/birminghams_levelling_up_strategy).

## 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. Our current funding relationships are (where they sit in the programme model in brackets):

- A [network meeting](#), independently facilitated by Huddlecraft (empowering individuals)
- Seven [Huddles](#), peer learning journeys on different aspects of economic justice in the city (empowering individuals).
- Small core grants to five organisations exploring the intersection between racial and economic injustice, alongside a learning programme run by [brap](#) (empowering individuals)
- [The Equality Trust's Peer Reporter](#) programme, with a view to influencing Birmingham City Council's adoption of the socio-economic equality duty (empowering individuals, challenging dominant institutions)
- [Save Birmingham](#), a campaign to protect public assets, and support to organisations seeking community asset transfer (building alternatives)
- [Loconomy](#), for its community wealth building activities in the St Pauls area (building alternatives)
- [Reclaiming Our Regional Economies \(RORE\)](#), a programme from the New Economics Foundation, Centre for Local Economic Strategies and the Centre for Thriving Places working to put citizens at the heart of regional decision-making (building alternatives)

Other strands will be added in the coming months and years, but all within our movement building framework.

## Our values and principles

The Advisory Group does not have a formal set of values and principles, but our approach is characterised by:

- 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.

## **Governance**

Day to day management of the programme is the responsibility of the Trust's Head of Economic Justice (Birmingham). She supports and is supported by the Advisory Group and is accountable via the Director of Programmes to the CEO and Board of the Trust. The Advisory Group was established to provide expert input and local experience to shape the programme and meets monthly.

### **Key deliverables**

As noted above, we have established a Learning Framework, to be implemented by our new Partner. However, we understand that a few tweaks may be needed for a different person to deliver it, so the first task for our new partner is to carry out a brief review of the framework and develop their own delivery plan, keeping to the principles and outcomes set out in the Framework. The remainder of the time will be spent on delivering the plan.

Outputs should include:

- An account of the programme from the point of appointment onwards (our first Learning Partner is writing up the development stage covering the period up to December 2024)
- 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 an interim report in March 2026 and a final report at the end of the contract (March 2027).
- 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 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 until the end of March 2027. There is a budget of up to £75,800 including VAT and time for the new learning partner to familiarise themselves with the programme and to develop a plan to deliver the learning framework, but there is no requirement to spend up to this amount and we welcome applications that are smaller in scope. We recognise that there may be additional costs, such as 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 is held by the Trust.

We welcome expressions of interest by 9 April 2025. Your proposal should be no longer than 8 pages long and should cover:

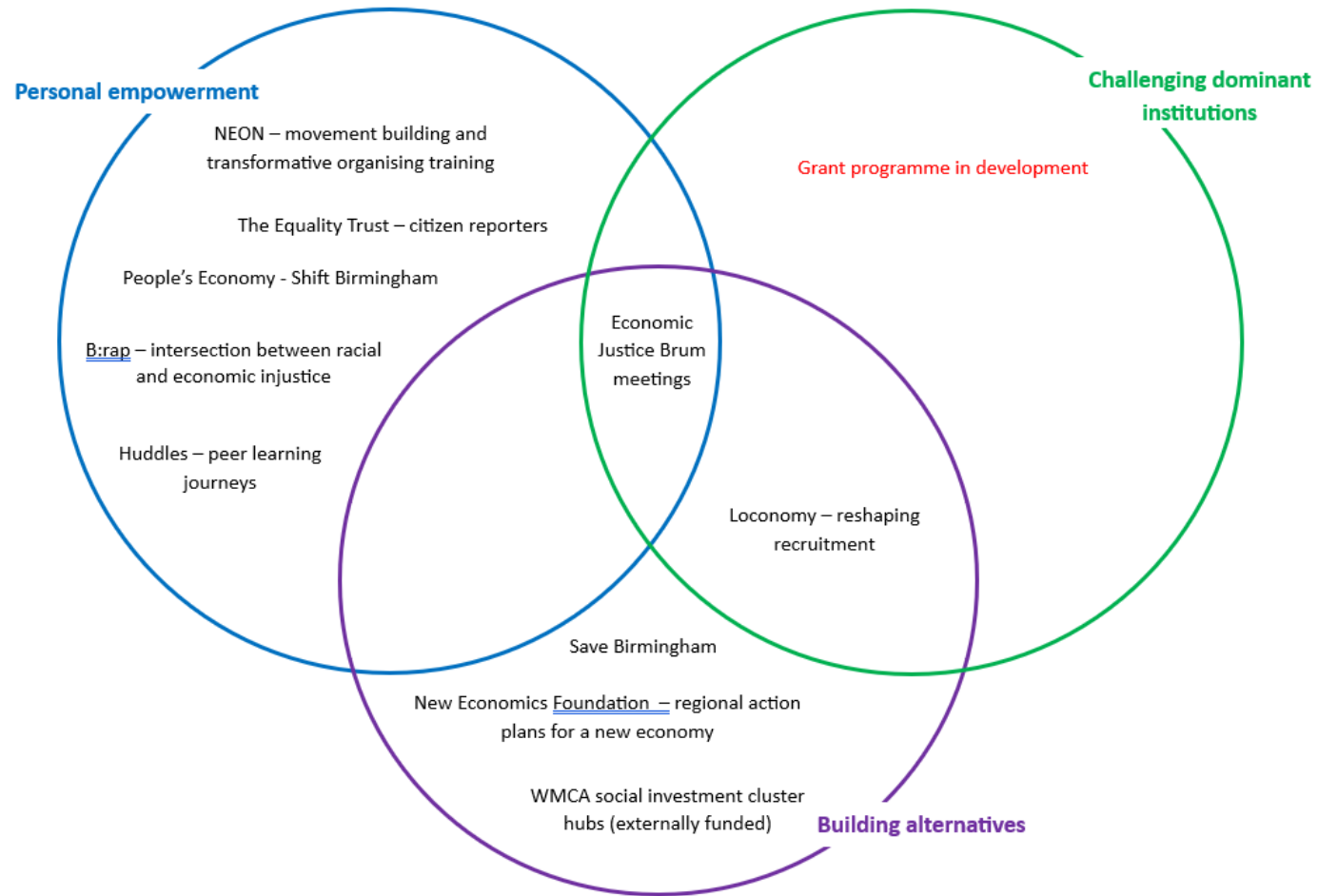
- Your understanding of the principles, approach and desired outcomes of the programme and how you might adapt the delivery plan (if at all)
- Your experience of undertaking similar briefs and your knowledge of movement development, systems thinking and a range of models of evaluation, including links 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.
- 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.
- A brief outline of how you see the relationship with the learning panel and how it would enrich your approach

- 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 principal budget headings. Please build a reasonable margin for inflation into the budget and include the rate(s) you have used.
- 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 9 April 2025.

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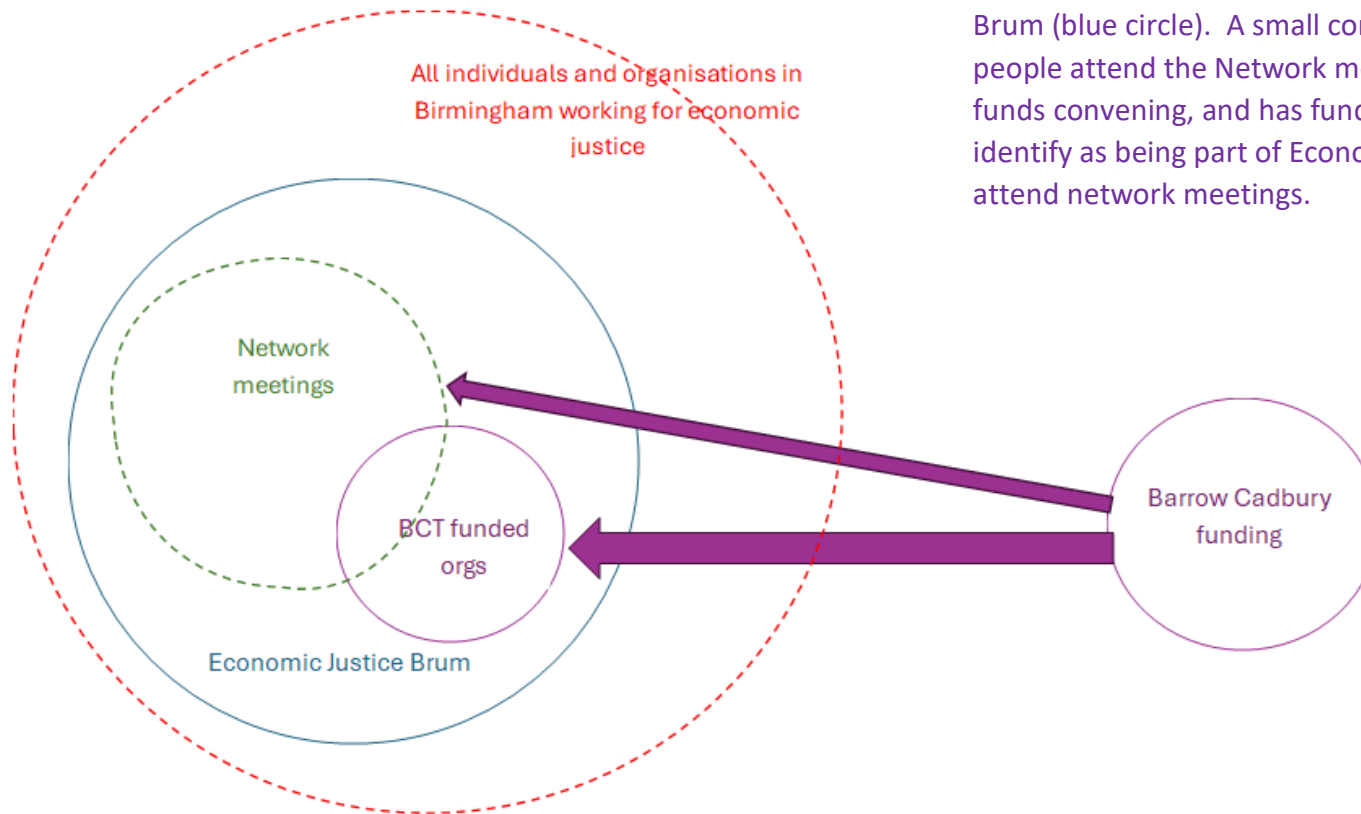
## Annex 1 – current grants and activities mapped on to our movement building framework





## Annex 2: How our funding fits into the wider change-making ecosystem

In Birmingham there are many organisations and individuals working for economic justice (red circle). Some, and we hope an increasing number, identify as being part of a movement called Economic Justice Brum (blue circle). A small core, and a larger shifting subset of those people attend the Network meetings (green circle). Barrow Cadbury funds convening, and has funded partners, all of which we expect will identify as being part of Economic Justice Brum and many of which will attend network meetings.



## Annex 3: Our Learning Framework (included verbatim as prepared by our current learning partner)

### 1. About this framework

This learning framework outlines my work from 1 October 2024 to 31 March 2027. It is based on the original proposal, a series of 17 interviews<sup>i</sup> conducted in late 2023 and early 2024, two participatory workshops held in March and May 2024, five observations of programme sessions, a range of informal conversations about the nature and direction of the work.

The first draft of the framework was produced in July and shared for feedback with Barrow Cadbury Trust, the Advisory Group, Evaluation Advisory Partners and delivery partners. The framework was updated in September to incorporate their feedback, then shared with the Learning Panel (see 7.1) for feedback during a full-day workshop in October. As part of this workshop, a visual representation of the learning framework was developed, which is included in Appendix 1.

This process resulted in changes to the outcomes and learning questions, and minor changes elsewhere. Some terminology was also revised, to reflect the wording of the communications strategy, messaging guide and Alliance rebrand.

This is not a static document – it will be reviewed annually with the Trust, the Advisory Group and the Learning Panel.

### 2. Context and approach

In a complex, ambitious programme such as this, learning is central. In many ways, learning *is* the programme: if we are successful, we will have learnt more about what it takes to build a movement for economic justice in Birmingham, and we will have used this knowledge to hone our approach.

The nature of this programme has a number of implications for my work:

Characteristic	Implications for learning
Achieving ultimate impacts is likely to require <b>generations</b> rather than years to achieve	Focus on articulating and learning about early signs that the <b>conditions for change</b> are taking root.
<b>Emergent</b> strategy, focused on experimentation	<b>Developmental evaluation</b> approach – focus on ongoing feedback and adaptation.  Look for <b>emerging patterns</b> , not expected results.  Focus on <b>learning</b> , not ‘proving’ or attributing impact.
Committed to tackling <b>structural inequalities</b> , with a particular focus on racial justice	Learning should be <b>intersectional</b> , with a focus on how privilege and oppression shape the programme and its impacts.  The process of learning should be <b>power-sensitive</b> and participatory, not extractive.

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Success will come from the **collective impact** of the movement

Focus on progress at the **whole-programme** level, rather than the contribution of individual activities.

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### 3. Learning Partner role and scope

My role is to maximise the potential for generating, sharing and acting on learning in this programme. This means:

- Working with the Trust, the Advisory Group, and the Learning Panel to articulate and refine the programme's theory of change, and define and track priority outcomes
- Facilitating learning spaces in which stakeholders across the programme can reflect on their work, generate learning about the programme, and contribute insights to wider programme learning
- Promote a culture of reflective practice and generative dialogue
- Gather and share external or unheard perspectives on the programme, through primary and secondary research.

#### 3.1. Learning about, as and for

My role is focused on learning **about** the programme – that is, learning that focuses on what we are trying to do, how we are going about it, and what changes we are seeing in relation to this. My role does not include:

- Learning **as** the programme – where learning primarily seeks to enable personal or collective empowerment and action (e.g. a session for local changemakers to analyse the root causes of economic justice in Birmingham)
- Learning **for** the programme – research and analysis that aims to inform decision-making and focuses outside of the programme (e.g. a power analysis of Birmingham).

There is some overlap between these categories, but learning **for** and learning **as** are not the primary focus of my role. The area of most overlap is my role in providing spaces where we can learn from organisations and people doing this work elsewhere (see 3.3) which arguably straddles all three areas.

#### 3.2. Reflecting, not solving

My work reflects the programme back to itself, highlighting areas of progress and challenge, alignment and misalignment, and issues that have been raised to me or that I have noticed. Where there is disagreement or a lack of clarity over strategy or goals, I can identify this, but it is important that ownership for addressing these issues stays with the Advisory Group, the Trust, and Economic Justice Brum where appropriate.

A good outcome of a learning session (see 7.2) would be the identification of questions or challenges to resolve and greater insight with which to resolve them – not the resolution itself. It is important that the Advisory Group and the Trust have sufficient capacity and accountability systems to address any issues raised in a collaborative way, so that important questions or challenges are not lost in the space between meetings and events.

#### 3.3. Learning beyond Birmingham

There is significant appetite for learning both from different city economies and different economic justice movements. At the same time, most stakeholders feel that building our learning from within the programme should be the priority, and recognise that we don't yet have sufficient knowledge of the economic justice landscape in Birmingham. The value of external perspectives is in stimulating adaptation, not replication.

External perspectives will be brought into this work in two ways:

- **Learning sessions** – dialogue with practitioners from other cities or movements, to encourage new perspectives and insights (see 7.2)
- **Comparative analysis** – summaries of the themes and learning arising from the work so far, integrated with comparable or contrasting perspectives from other cities and movements (see 7.6).

#### 4. Values and principles

My work is values-led and my principles are woven into the design of the learning framework. They are the lens through which the activities (section 7) should be read.

Value	Principles
<b>Justice</b>	<p>Evaluation is a political activity and I will be sensitive to the way power can be used and misused in all learning activities.</p> <p>Grant funding is a power-laden context, so I will pay close attention to where control and ownership sit in the work, and how imbalances of power impact people.</p> <p>It is a privilege, not a right, to hear the stories of people with lived experience of economic injustice, and those stories should be treated with respect, not seen as a resource to be extracted.</p>
<b>Care</b>	<p>Our individual and collective wellbeing is central to this work and we should all be supported to meet our needs.</p> <p>Access is collective joy<sup>ii</sup> and should be a central feature of design, not an afterthought.</p> <p>I will design with respect for the grief and trauma many people experience in relation to economic injustice, and with the skills to support participants through moments of distress or intense emotion.</p>
<b>Courage</b>	<p>I will name the uncertainty and not-knowing inherent in this work, and the discomfort this can bring, and I will balance our need for clarity with a tolerance for sitting with complexity and ambiguity.</p> <p>I will offer accountability through clear communication, openness to feedback, embrace of failure, and willingness to take responsibility for mistakes.</p> <p>Where misalignment or conflict exists, I will name it and approach it in a generative way.</p>
<b>Polyphony</b>	<p>All perspectives are both valid and partial (never 'objective'), and all can be deepened through dialogue with other views.</p> <p>In any learning activity, we should ask whose knowledge is prioritised, what type of knowledge is prioritised, and whose voices are missing.</p>

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There is no hierarchy of knowledge – in particular, lived experience is just as valid a source as professional or academic knowledge.

Language should be as simple as possible without losing meaning, to ensure everyone is included in the conversation.

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## 5. Outcomes

While our learning activities will be rich and emergent, they need a structure. This will be provided by the core outcomes for the programme, which are proposed in section 5.4.

These outcomes should help to focus our learning, but they should not limit our vision. It is we remain receptive to unexpected outcomes, in both our methods (e.g. open-ended qualitative research, seeking out unheard voices) and our outlook.

### 5.1. How these outcomes were designed

These outcomes were developed using a number of inputs:

- 17 initial interviews with Advisory Group members, the Trust staff and trustees, and Economic Justice Brum participants
- Two workshops with Advisory Group members and the Trust staff, followed by written input
- My own experience in evaluation of movements for complex systems change.

At the end of our outcomes prioritisation workshop, 36 outcomes had received votes for inclusion. The outcomes below were chosen because they:

- Had been consistently mentioned and supported across interviews and workshops (with the number of workshop votes increasing the likelihood of inclusion)
- They were balanced across levels and types of outcome (see 5.3)
- They were balanced across movement-building strands (personal empowerment, challenging dominant institutions and building alternatives)
- They focused on outcomes (changes beyond the direct control of the programme) not outputs (things we produce/deliver) or activities (things we do)
- They were well-evidenced in evaluation frameworks for movement-building and systems change.

### 5.2. A note on language

The phrasing of these outcomes is intended to be as simple and clear as possible, so that they are accessible to all who participate in learning activities. The richness and nuance will be found in the evidence we bring to these outcomes and the discussion we have around them.

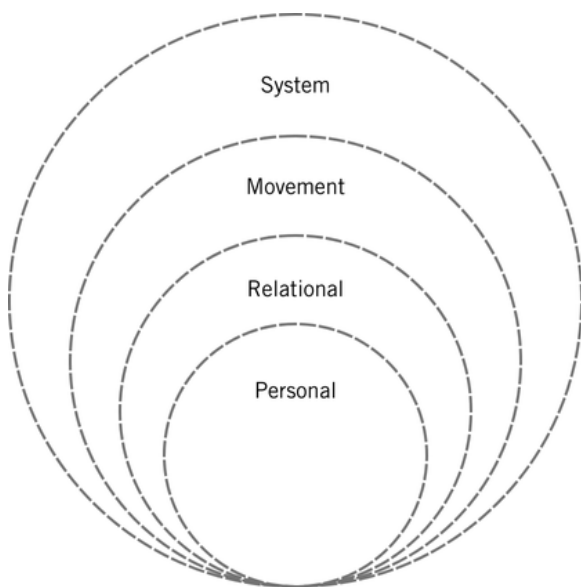
Most outcomes are phrased in a general, open-ended way, to allow space for the many different types of change and the diversity of funded partners' work. This helps to reduce the risk that we only see what we are looking for, but it requires us to sit with ambiguity.

As we learn from the work and update our theory of change, we may find that we are able to become more specific about the changes we are seeking.

### 5.3. Levels and types of outcome

The level of the outcome is the point in the system at which the outcome is focused. Each level is connected to the other and some outcomes may traverse levels.

<b>System</b>	People and institutions in Birmingham’s wider economic system who are not directly involved in the movement, including powerholders in dominant institutions. Change at this level is hardest to achieve, but has the potential for ripples of impact across the city.
<b>Movement</b>	The network of people and organisations working for change across the Economic Justice programme. The movement is more than the sum of its individual parts – it has characteristics, strengths and weaknesses as a collective entity.
<b>Relational</b>	Movements are built on relationships, knowledge is embedded in relationships, and power is relational. The qualities of a relationship are distinct from the qualities of individuals in the relationship – they are co-created.
<b>Personal</b>	Social change is human change and personal transformation is the foundation of effective action. This level includes all people in the movement, including: <ul style="list-style-type: none"><li>• Community members and changemakers in Birmingham</li><li>• VCFSE<sup>iii</sup> organisations working in Birmingham</li><li>• Amplifiers in dominant institutions.</li></ul>



Across these levels, we see a range of types of outcome, all of which are necessary for change. Again, the proposed outcomes span all of these types of outcome and sometimes traverse multiple types.

<b>Mindset</b>	Beliefs, attitudes and perceptions about Birmingham’s economic system and our role in it, which shape all other aspects of our thinking, feeling and doing.
<b>Understanding</b>	Embedded knowledge about Birmingham’s economic system and other interconnected systems.
<b>Capabilities</b>	Skills and wisdom that enable people to contribute to change in Birmingham’s economic system.
<b>Connections</b>	Personal or professional bonds that enable people to influence and/or build power with others.
<b>Action</b>	Activity that aims to contribute to economic systems change in Birmingham.
<b>Integrity</b>	Alignment of values and practice, which is essential to the effectiveness, legitimacy and sustainability of a movement.

#### 5.4. Proposed core outcomes

<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>• Words and phrases in pink are candidates for further specificity, which require decision-making on strategy and values. If we don’t have the analysis or evidence to make these decisions, or if it would be restrictive to funded partners to be more specific, it is right that the outcomes remain general at this stage. We can refine them as we learn.</li> <li>• The system level outcomes may not be achievable by the end of the first strategic period (March 2027). We will look for evidence of progress towards these outcomes, including evidence that the conditions for these changes are being established.</li> <li>• We are missing a system-level outcome around building alternatives, which will need to be developed at a future meeting or learning session.</li> </ul>
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#### Personal

1. People in the movement believe that change is possible.
2. People in the movement build the capabilities, confidence and ways of being needed to create change.
3. People in the movement develop a greater understanding of how economic injustice intersects with other forms of structural injustice, particularly racial injustice.

#### Relational

4. People in the movement develop and deepen relationships with each other.
5. People in the movement develop influential relationships with powerholders in dominant institutions.

## **Movement**

6. The movement embodies its values in its processes and decision-making.
7. People who are impacted by structural inequalities participate in and hold power in the movement, particularly people who are impacted by racial injustice.
8. The movement knows it has played a part in positive economic change (outcomes 10 or 11) at any scale.

## **System**

9. Powerholders in dominant institutions believe that change is possible and that they have a role to play.
10. Dominant institutions change policies, practices and resource flows to enable economic justice.
11. Initiatives that offer an alternative to the current economic model demonstrate the possibility of a more equitable economy in Birmingham.

## **Outcomes measurement**

We will not predetermine indicators for each outcome – instead we will build a collage of evidence that gives a nuanced picture of overall progress on these outcomes, including interview and focus group insights, funded partners’ monitoring data, material generated by programme participants (including peer research and community reporting), and collective reflection. I will collate and analyse evidence on an ongoing basis, and learning sessions (see 7.2) will be a focal point for gathering and reflecting on evidence against these outcomes.

Progress, challenges and questions relating to learning outcomes will be summarised on an online programme dashboard, which any programme stakeholders can access. The dashboard will also make space for unexpected and unintended outcomes, to ensure we don’t narrow our vision to only see what we’re looking for.

Funded partners and delivery partners will be invited to share activities, progress and lessons learned via the platform and other communications channels, such as a Whatsapp community.

## **6. Learning questions**

Like outcomes, our learning questions act as a focus for learning activities. They have emerged and been prioritised in the same way as the outcomes, with the additional lens of the Tamarack Institute’s triple loop learning framework.<sup>iv</sup>

The purpose of setting these questions is not to limit our discussions, but to ensure we focus our research and build our learning in priority areas. They will evolve over time and should be reviewed yearly. Insights related to these learning questions will also be shared on the programme dashboard.

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### **Single loop**

*What are we learning about what we are doing?*

1. How can we build a movement that centres the participation and leadership of people with lived experience of economic injustice?
  2. How is the programme evolving as we learn and adapt?
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<p><b>Double loop</b></p> <p><i>What are we learning about our assumptions, understanding and thinking?</i></p>	<ol style="list-style-type: none"> <li>3. How can we ensure our work is rooted in a strong understanding of our city, including the landscape of power and existing efforts to challenge economic injustice?</li> <li>4. What are we learning about the root causes of economic injustice in Birmingham?</li> <li>5. What are we learning about the characteristics of a just economic system?</li> </ol>
<p><b>Triple loop</b></p> <p><i>What are we learning about how we are being?</i></p>	<ol style="list-style-type: none"> <li>6. What are the values of our movement and how do we embody them?</li> <li>7. How is the way we work, individually and collectively, contributing to holding the current system in place?</li> <li>8. What are we learning about new ways of being and working that are required to shift the system?</li> </ol>

## 7. Learning activities

The activities below are designed to have high process value – that is, they will be valuable for everyone who participates, as well as generating important learning and useful insights for the programme. The emphasis is on experiential, collaborative learning:

- **Experiential** – learning through dialogue and activity, engaging the mind, body and emotions, so that lessons are embedded in our selves rather than locked in a written report
- **Collaborative** – sharing insights directly with each other and finding new insights together, rather than the Learning Partner gathering, filtering and reporting on isolated insights.

### 7.1. Learning Panel

The Learning Panel is a group of six Economic Justice Learning Advisors, who are Birmingham residents with current or recent lived experience of economic injustice, alongside diverse personal and professional experience (see Appendix 2 for a list of panel members). They meet quarterly, sometimes in conjunction with learning sessions (see 7.2).

The Learning Panel has been established to resist the common pattern in which the agenda for learning – including the questions we ask, what counts as valid evidence, and how we interpret that evidence – is set by those who already hold power and privilege in a system. Panel members<sup>v</sup> advise on the evolution of this learning framework; contribute to the analysis of evidence, including the identification of learning points; and guide the design and content of communications.

This is an experimental approach to building greater equity in evaluation, so it is likely to evolve as the work progresses, and will generate many lessons of its own.

The Learning Panel is co-facilitated, with the second facilitator (Anneka Deva) focused on building and holding the group's internal relationships and culture, so that I can hold a bridging role that represents the perspectives of other stakeholders on the programme where appropriate.

## Workplan

<b>24-25</b>	1 x co-design session
<i>6 months</i>	2 x quarterly meeting (some may be combined with learning sessions – see 7.2)
<b>25-26</b>	4 x quarterly meeting (as above)
<b>26-27</b>	4 x quarterly meeting (as above)

### 7.2. Learning sessions

Learning sessions are participatory workshops in which programme stakeholders gather evidence and insights, explore and reflect on patterns and lessons, and consider what these mean for work going forward.

The precise format will be developed in collaboration with participants (including funded partners, who are yet to be consulted) but is likely to include:

- Harvesting and mapping of evidence gathered by funded partners and delivery partners, including material generated by participants – focused on, but not limited to, core outcomes
- Reflection and dialogue around progress, challenges and lessons learned – what’s changed, what have we contributed to change, and what have we learnt about our theory of change?
- Input from and conversations with people working in other locations or movements, as a stimulus for new ideas and insights
- Creative approaches to participatory analysis, such as zine making, open space sessions and timeline mapping
- Discussion and agreement of evidence and insights that should be shared on the dashboard.

Participants will include:

- Funded partners
- Participants from funded partners’ programmes
- Economic Justice Brum participants (including amplifiers in dominant institutions)
- Action Fund panel members
- Learning Panel members
- Advisory Group members and Trust staff.

Some session elements will be closed, so that funded partners can share challenges and failures in greater safety.

Strand learning sessions will focus on each of the three movement strands used to structure the programme (personal empowerment, challenging dominant institutions and building alternatives) and will invite participants to bring insights and evidence relevant to programme outcomes. Programme learning

sessions will consider the programme as a whole. The focus of learning sessions in each year will be decided in consultation with the Advisory Group and Learning Panel.

### Workplan

<b>24-25</b>	1 x programme learning session
<i>6 months</i>	
<b>25-26</b>	2 x strand/programme learning sessions
<b>26-27</b>	2 x strand/programme learning sessions

### 7.3. Reflective practice: journals and focus groups

To facilitate triple loop learning (see 6) and capture deeper insights on the process of change, Advisory Group and Learning Panel members will be invited to complete a journal. This will contain some suggested prompts for reflection, based on the learning questions and outcomes, and will encourage reflexivity around our own position in the economic system and role in facilitating change. A short period of time for journalling will be allocated in Advisory Group and Learning Panel meetings, but participants will also be encouraged to journal outside of these meetings.

While a paper journal will be provided for participants, journalling does not have to be written: it could include photography, art, voice notes, video notes, or any other form of capture that works for journalers.

Those who opt to keep a journal will not be asked to share the full contents of their journal, but will be invited to review it and share insights that emerge.

All Advisory Group members will be invited to participate in an annual focus group (group interview)<sup>vi</sup> and those who have completed journals will be invited to share their reflections as part of this. This will cover topics such as the Group's experiences of the programme, what they have learnt about economic justice and the process of change, their personal development, and how the Advisory Group functions.

Learning Panel members will be invited to review and reflect on their journal entries as part of an annual reflection session, which may take the form of a focus group or another participatory exercise. I will also keep a journal and will use the insights from this in my analysis.

### Workplan

<b>24-25</b>	Journals issued
<i>6 months</i>	1 x Advisory Group focus group
	1 x Learning Panel reflection session (as part of quarterly meeting)
<b>25-26</b>	Ongoing journal prompts
	1 x Advisory Group focus group
	1 x Learning Panel reflection session (as above)
<b>26-27</b>	Ongoing journal prompts

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- 1 x Advisory Group focus group
  - 1 x Learning Panel reflection session (as above)
- 

#### 7.4. Primary research

It is important that perspectives on the programme are also gathered from those who were unable or chose not to participate, as well as those whose voices might otherwise be unheard.

I will undertake rolling **qualitative interviews** on an average basis of one interview per month, with purposeful sampling that prioritises:

- People with lived experience of economic injustice who have been in contact with the programme but who have not participated in the programme or ceased to participate
- Organisations working on economic injustice who have not participated or ceased to participate in Economic Justice Brum
- Economic Justice Brum participants who are members of groups or communities that are underrepresented in Economic Justice Brum and/or that are most likely to experience economic injustice<sup>vii</sup>
- Powerholders who have been identified as influencing targets by the programme.

Any member of the Advisory Group or Economic Justice Brum can also request an interview with me if they feel that they are unable to share important insights directly with other stakeholders.

Interviews will be transcribed and the transcripts reviewed by participants. A copy of the interview coding will also be shared with participants. No direct quotations will be taken from interviews, even anonymously, without participants' consent.

I will also undertake selective **observations** of Economic Justice Brum meetings, Advisory Group meetings and Action Fund panels.

#### Workplan

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<b>24-25</b>	4 x interview
<i>6 months</i>	2 x observation

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<b>25-26</b>	8 x interview
	3 x observation

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<b>26-27</b>	6 x interview
	3 x observation

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#### 7.5. Economic Justice Brum evaluation support

Following my light-touch involvement in the evaluation of Economic Justice Brum in spring 2024, I have allocated two days in each full year (25-26 and 26-27) to support future reviews of Economic Justice Brum and ensure that the insights generated are connected to wider programme learning.

## 7.6. Analysis

The outputs of activities 7.1 to 7.4 will be analysed on a regular basis, used to update the dashboard, and key themes reported in person (see 8). In addition, I will undertake ongoing context monitoring (staying aware of what is happening in Birmingham’s economy and civil society) and review of programme documentation to ensure I situate my analysis in an up-to-date understanding of the work.

In each year, I will produce three additional outputs of this analysis, which are detailed below.

### Workplan

<b>24-25</b>	<b>Internal analysis</b>
<i>6 months</i>	Further refinement of the vision and theory of change and brief analysis of programme ways of working, based on primary research and workshops to date
<b>25-26</b>	<b>Comparative analysis</b>
	Internal analysis of a specific area or theme, set in the context of work in other locations or movements, with the aim of identifying promising practice and lessons that could be applied here
	The focus of this analysis will be agreed with the Advisory Group and Learning Panel
<b>26-27</b>	<b>Comparative analysis</b>
	As above

## 8. Communications and engagement

Knowledge is embedded through relationships<sup>viii</sup> and the primary mode of communication for this work is dialogue. The decentralised approach proposed here ensures that my role does not become a bottleneck for sharing learning; instead, my role is to create spaces in which learning is shared directly and to ensure that dialogue happens in a generative way.

Beyond the learning activities outlined in section 7, learning will be shared through quarterly slots at Advisory Group and Economic Justice Brum meetings. This will be a brief session aiming to share and explore insights gathered through the previous quarter’s learning activities. Learning Panel members will have an important role in documenting and sharing learning, both in meetings and in communications materials.

While the primary focus of communications is internal to the programme, the learning generated can also be a powerful attractor to and resource for those outside the programme. Priority external audiences will be agreed in conjunction with the Communications Partner, but are likely to include powerholders in dominant institutions, funders with an interest in economic justice, and potential Economic Justice Brum members.

Learning will be shared externally in a number of ways:

- With the agreement of internal participants, a small number of safe<sup>x</sup> external participants could be invited to the latter stages of learning sessions, to hear a summary of the day's learning and engage with participants
- Time is allocated in 26-27 for a participatory external event to celebrate and share learning from the programme's first strategic period, incorporating creative approaches<sup>x</sup>
- Time is also allocated in the final year for the creation of an external communications product, to share the story and learning so far in an engaging way.

These external communications will platform a range of voices, particularly the voices of those with lived experience of economic injustice, and will be designed in collaboration with the Advisory Group, Learning Panel and Economic Justice Brum.

The Communications Partner could also create external outputs from internal resources (such as the dashboard, analysis papers and harvesting from learning sessions), providing this has consent from all involved in generating the learning.

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<sup>i</sup> 9 Advisory Group members, 5 Economic Justice Brum members (regular attendees), 3 Barrow Cadbury Trust members.

<sup>ii</sup> Piepzna-Samarasinha, L.L. (2018) *Care work: Dreaming disability justice*. Arsenal Pulp Press.

<sup>iii</sup> Voluntary, Community, Faith and Social Enterprise sectors.

<sup>iv</sup> Cabaj, M. (2019) *Evaluating systems change results: An inquiry framework*. Tamarack Institute. <https://www.tamarackcommunity.ca/library/paper-evaluating-systems-change-results-an-inquiry-framework>

<sup>v</sup> We are in the process of establishing a role title and description, which we hope to share with the Advisory Group in November.

<sup>vi</sup> The Advisory Group focus group replaces individual interviews, as it would not be possible to interview all Advisory Group members on an annual basis within the time constraints of this project, nor would it be possible to analyse and share the findings in a timely way. By cutting out the middleperson, insights and feedback can be shared instantly and without the Learning Partner's filter. However, if an Advisory Group member feels they have important feedback that they cannot share directly with other Advisory Group members, they can request an interview with me.

<sup>vii</sup> For example, people who are Black, Asian or from other minoritised ethnic groups, disabled people, and unpaid carers.

<sup>viii</sup> Yunkaporta, T. (2020) *Sand talk: How indigenous thinking can save the world*. Harperone.

<sup>ix</sup> As judged by internal participants.

<sup>x</sup> We have begun discussing ideas for this event in Learning Panel meetings, with suggestions including poetry, drama and stand-up comedy, alongside my original proposal idea of a temporary Museum of Economic Justice.