

Appendix 1

Museums Services Contract and Lease 2022-26

Birmingham Museums Trust Operation / Service Delivery Review 2018-2022 and Forward Plans 2022-2026

2018-2020

2018/19 was an extremely successful year for Birmingham Museums Trust with significant increases in visitors, substantial improvements in collections management and documentation, the delivery of high profile critically acclaimed exhibitions including the launch of a major international touring exhibition, and the securing of a national award for BMT's innovative approach to collecting.

In 2018-19 BMT attracted 1,190,893 visitors across all its sites. 56% of these were first-time visitors, 17% of visitors were from Black Asian and Minority Ethnic backgrounds, 25% from lower socio-economic groups C2DE and 6% with a disability. 2018/19 was a very successful year for BMT seeing a 28% increase in visitors overall including increases in first time and C2DE visitors, as well as a continued trend for increasingly younger visitors (60% of adult visitors to BMT were aged 44 and under).

In 2019-20, there were 923,145 visitors of which 47% were first time visitors - 192,198 of which participated in informal learning sessions.

106,420 school children from 2,053 schools took part in education programmes (the highest number of school visits of any cultural organisation in the city) and 50 children took part in the Arts Awards accreditation programme

Over 1,100 volunteers gave their time and expertise to support the charity (over 24,000 hours).

There were over 1.2m visits to the BMT website and the number of Birmingham Museums Trust social media followers increased by 10.5% to 229,629 across Facebook, Twitter and Instagram.

Programming

- BMT had its most successful year ever for exhibitions in 2018-19 including a high-profile programme underpinned by national partnerships with the Natural History Museum, the Arts Council Collection and the Royal Collection, using these collaborations to give further profile to Birmingham's own collection. For example, 'Dippy on Tour: A Natural History Adventure' had over a quarter of a million people visiting the exhibition at BMAG (spending an estimated £4.2million in the city during its 107-day run).
- Regarding presenting Contemporary Art programmes of national significance, 2018/19 saw the final year of the three-year Arts Council Collection 'National Partners Programme' (which attracted an impressive 625,000 visitors to its eight exhibitions shown across four Birmingham museums over three years). Leading British (film) artist Rachel McLean was commissioned to curate the

final exhibition of the programme entitled '*Too Cute! Sweet is about to get Sinister*'.

- BMT also hosted the South Asian Diaspora Arts Archive - developing associated South Asian arts events and collecting programmes.
- Two new exhibitions opened at BMAG in 2019 - '*Birmingham Revolutions: Power to the People*' and '*Dressed to the Nines*' showcased 'star' objects from Birmingham's collection and were part of a series of new storyline displays to encourage feedback from visitors to help shape the future plans of the museum
- Working with Home of Metal, BMT recruited 27 volunteers who gave 1,000 hours of their time to support '*Home of Metal presents Black Sabbath 50 years*'.
- A gallery installation of three films by Yugesh Walia explored cultural moments and experiences for Birmingham's Black and Asian communities in the 1980s.
- International touring exhibitions to raise the profile for BMT and the city and generate new income streams – BMT planned to develop a rolling programme of at least four touring exhibitions involving new collection research. Those delivered included; '*Victorian Radicals*' an 8-venue US touring exhibition with scholarly catalogue from Oct 2018 to Apr 2021 in partnership with the American Federation of Arts (AFA); Contribution to '*Parabola of Pre-Raphaelitism*' 3 venue Japanese touring exhibition from Feb to Dec 2019 in partnership with Artis.

In June 2019, Birmingham Museums Trust was delighted to accept the Overall award for excellence at the Charity Awards 2019, the longest running and most prestigious awards scheme in the charity sector. As well as winning the top prize in the arts, culture and heritage category, BMT were chosen as the overall winner for their Collecting Birmingham project; a project that addressed the need to truly reflect the city's multi-cultural and socio-economic diversity in the museum's collection

Learning and Engagement

In 2019/20, BMT's community engagement programme reached around 3000 people across the city through 100 events and projects.

- BMT worked in partnership with Beatfreaks (an organisation that provides a community for young creatives) delivering a two-year engagement project including new displays curated by young people at Soho House in 2019 and, a project at Aston Hall titled '*Don't Settle*' where young people of colour tell stories about the Hall that are relevant to the experiences of local diverse audiences
- A Youth Advisory Board (YAB) was established at Soho House in 2019 and will continue to shape the future programme at the House.
- BMT's Mini Pioneers' delivers a new outreach and in-reach programme of STEM learning challenges that captivate primary school children and their families with engineering at home and in education. The project planned to engage 600 children across 10 schools in areas of Birmingham with high levels of multiple deprivation with a challenge and award competition.

- BMT's '*Museum in a Box*' scheme engaged 17,083 children and adults who learned about art, history or science from enjoying these collection loan boxes in their schools or community organisations
- BMT delivered two accredited training courses and regular in-house training opportunities for the volunteer team

Collections

Birmingham City Council's museum collection of over 1 million objects is one of the great civic museum collections of the United Kingdom and of national significance. The Museum Collections Centre (in Dollman Street) is one of only a few accredited museums in the UK because it provides a regular level of public access for general public, researchers, students and teachers etc.

Birmingham Museums is one of the biggest lenders of any non-national museums service in the UK and the reach of BMT's collection continues to extend far beyond Birmingham. In addition to the Trust's own museum visitors, over 525,000 people attended exhibitions at other UK and international venues featuring loaned objects from Birmingham's collection. A further 8.5 million people visited museums across the UK featuring objects on long term loan from Birmingham's collection.

- BMT embarked upon digitising and documenting 36,000 artworks from the Designated works on paper collection (target March 2022). This included; Recruitment of a Digitisation Assistant and 4 community volunteers to support collections research and documentation enhancement programme; Investing in a new user-friendly web interface to increase public access to online collection and Digitisation of 10,000 topographical views at MCC
- This open access policy has been very successful - following the launch the public version of the digital asset management system (DAMS) in May 2019. Over the year it quickly outstripped targets, achieving 1,712,539 image views and 18,933 downloads.
- Researching and cataloguing 25,000 items from the Science & Industry and Natural Science collections (target March 2022) with the help of special interest groups and volunteers.
- Undertaking a science and industry collection rationalisation programme from 2019-2022
- BMT secured a collaborative doctoral award for a postgraduate student to work on the significant Italian Renaissance and Baroque decorative art collection, comprising ceramics, glass, textiles, furniture and metalwork collection. For the first time, the project examines the history and significance of this collection, raising its profile and making an important contribution to understanding of this collection.
- BMT continued to acquire significant collections on behalf of the city through purchase, gift and bequest (1,353 acquisitions alone in 2018/19). Funding comes from various sources including The Museums Acquisitions Fund, Heritage Lottery Fund, Friends of Birmingham Museums Trust plus, a range of Trusts, Foundations and donations.
- The Staffordshire Hoard monograph was published by the Society of Antiquaries in London in November 2019 and is the result of a ten-year conservation and research project.

Developing the Historic Properties

BMT delivered several (visitor) improvement projects across museum sites. These included;

- MJQ Reception Redevelopment – a new viewing window into the historic factory and an overhaul of the shop / reception area (opened 2020)
- Sarehole Mill - electrical works and a new modern-day Kitchen/ bakery and shop refit. Also, BMT secured funding for investigative works to diagnose the issue and repair of the historic waterwheel to able to produce flour on site once again.
- Aston Hall developments - including café and retail improvements to support increased visitor numbers

In tandem with the above, BMT introduced new visitor group packages, pricing strategy, itineraries and catering options for most of the sites to attract visitors and maximise income. In addition, Aston Hall, Blakesley Hall, Soho House, Sarehole Mill and the Museum of the Jewellery Quarter were all confirmed as Birmingham Partners for the National Trust in 2020. These sites are now promoted to over 4 million National Trust members, including 1 million members in the Midlands, via the National Trust Handbook

Thinktank Museum

BMT implemented a 10-year programme of capital investment, sector-leading STEM engagement programmes and commercial developments to enable Thinktank to grow income and audiences. This included;

- Capital investment of £2.1m into a new MiniBrum gallery – a brand new under 8's STEM gallery which opened in May 2019, designed to enable children to explore what it means to live in a big city.
- Developing new STEM engagement programmes and STEM innovation displays with HEI partners, ASDC and industry partners.
- Restoration of James Watt's Smethwick Engine and new displays about Watt, his workforce and legacy for the Watt Bicentenary in 2019.
- Digital 4k planetarium upgrade and development of flexible exhibition space providing improved corporate and public hire spaces.
- Developing new Nature Explorers displays by March 2021.

The Duchess of Cambridge visited MiniBrum at Thinktank on 21 January 2020 to launch the landmark UK-wide survey 5 Big Questions, aimed to spark the biggest ever conversation on early childhood. The popularity of the new gallery would have meant the best year ever for Thinktank since the museum opened, had lockdown not intervened.

Staffing and Governance

In February 2020 Professor Ian Grosvenor, BMT's Chair since 2016, stood down. Niels de Vos was appointed as his successor

At the end of the year Dr Ellen McAdam retired as Director after nearly seven years, Sara Wajid and Zak Mensah were subsequently appointed joint CEOs and joined BMT in early 2021.

Councillors Robert Alden and Philip Davis were nominated as BMT Trustees by the city council.

2020 – 2022 - Managing through the Pandemic

On 23rd March 2020, the Government announced the UK was under Lockdown in response to COVID-19. This included the closure of Museum and Heritage facilities to stop the spread of infection.

At the beginning of April 2020 all BMT's public sites (except Sarehole Mill community shop) were closed due to COVID-19 restrictions. The Government roadmap prevented museums from reopening until 17 May. Where possible BMT's workforce was put on furlough and up to 80% of their salary covered by the Government job retention scheme. BMT continued to maintain the care of collections and security and maintenance of sites. The trust also worked with partner organisations to deliver community information online.

Through the Association for Large Visitor Attractions (ALVA) BMT planned on the basis that public sentiment was cautious about returning to indoor venues. The Trust planned for an average throughout the year of 30% of its operating capacity for the key sites and decided to keep small venues (Museum of Jewellery Quarter and Soho House) closed to the general public. The Government roadmap step 3 remained on track and museums were permitted to reopen in May.

Visitor capacity was limited to 50% of normal capacity, group sizes were restricted, and one-way systems and social distancing safeguards were implemented. It was noted that audience figures from London venues which reopened first were worryingly low.

BMT had to also contend with associated operational matters such as loss of staff, staff needing to self-isolate, the transition to remote working, and the additional challenge of having to decant all collections from BMAG into storage (for the Council House complex rewiring works).

BMT reopened Thinktank on 29th May in time for half term. The visitor figure for half-term exceeded 2019 and June saw Thinktank achieve well above their original 30% forecast. A focused effort to boost visitation during term-time weekdays was implemented. BMAG, as part of the wider Council House complex rewiring project, remained closed for the rest of 2021 with partial reopening expected between 2022 to 2024. Aston Hall reopened 7 July and Blakesley Hall on 21 July in time for summer holidays.

Despite the global pandemic forcing most museums to close, last year 583,943 people saw 3,528 objects on short- or long-term loan from Birmingham's collection in other UK and international museums.

The Google satisfaction reviews for all BMT sites have been very positive with scores between 4.3 to 4.5 out of 5. BMT intend to start mapping visitors by postcode which will give them a deeper understanding of visitor demographics.

BMT has been successful in a consortium funding bid for a regional and international youth engagement programme to align with the Commonwealth Games. The programme is part of the 'Midlands Makes It' regional consortium bid to ACE. BMT will deliver:

- **'Inspire'**, an arts competition to encourage a better understanding of the Commonwealth and share a spirit of ambition through the entries of over 400 children aged 5-16 years.
- **Go global – the big school debate**, a live feed event connecting Commonwealth and Birmingham school pupils to discuss their perceptions and hopes for the Commonwealth.
- **My museum of the Commonwealth** will encourage child-led enquiry with their parents, grandparents and social group leaders. It will give children and young people the tools to explore family and community stories and create their own pop-up museums. BMT will work with teachers and partner museums to co-produce a toolkit which will be available for use by the 1,000+ schools in the West Midlands.

In October 2020, BMT and the council submitted a joint bid for £5m from the Government's MENF Fund scheme towards major repairs and maintenance to BMAG. If successful, this will be a significant step towards improvements to the museum on top of the Council House complex rewiring works.

Financial situation

In 2020 Government announced a range of measures to support businesses and organisations through the Pandemic. Following a comprehensive process of applications, BMT was awarded the following emergency support for 2020 and 2021;

- £1.7m from the Cultural Recovery Fund (CRF Round 1) administered by ACE
- £0.8m the Cultural Recovery Fund (CRF Round 2),
- £1.1m from the Coronavirus Job Retention Scheme
- £0.250m Emergency Funding from the National Lottery Heritage Fund.

A further CRF 2 funding grant was successful in late March 2021 which covered operating losses April to June 2021 and provided some extra funds to increase the reserve position which had been depleted.

BMT also applied to the city council for Supplier Relief. This was in line with Council guidance to maintain payments to suppliers it identified as being at risk, as required under the Policy Procurement Note (PPN) – Supplier relief due to COVID-19, Action Note PPN 02/20, issued by MHCLG in March 2020. BMT was awarded a total of £0.204m to cover losses calculated up to 31 March 2020 then for the period April 1 to 4 July 2020.

Given that BMT lost 95% of its earned income from admissions and trading during 2020/21, the Trust has done well to secure funding from various sources in order to build a healthy cushion of reserves.

In 2021/22 The Trust is on track for an estimated £0.150m operating surplus at year end - if sites can remain open. Whilst Unrestricted Reserves are currently in a healthy position at £3.687m, the Trust is obliged to cover a minimum of 3 months operating costs if the Trust was to wind down and, the biggest challenge facing the business next year is reduced visitor numbers. In 2021-22 the organisation has been underpinned by £829k from Cultural Relief Fund (Round 2) but in 2022/23, BMT will have to be self-reliant. Whilst BMAG remains closed, the Trust will particularly need visitor numbers (and visitor spend) at Thinktank to get back to pre-pandemic levels in order to breakeven.

Funding / Fundraising

In 2019/20 Birmingham Museums Trust generated fundraising income of £1.235m from its supporters, donors and grant makers. Fundraising represents between 10-15% of Birmingham Museum Trust's £10-12m annual income. Fundraising (sometimes called Contributed Income) includes a number of income sources as listed below.

Fundraising Source	Percent of fundraising income since 2012
Public grants (money originates from LA, Arts Council England, government or national lottery)	45%
Trusts foundations (charities founded for public benefit usually with specific areas of interest e.g. Arts, Medicine etc)	44%
Donations (from individuals or organisations)	4%
Patrons (a membership scheme of high net worth individuals)	1%
Legacies (cash gifts in wills)	5%
Corporate (sponsorship for contracted benefits)	1%

Separate to the council contract management fee, BMT receives its largest partner grant £1m p/a from Arts Council England (ACE) as a National Portfolio Organisation (NPO). This funding is typically reviewed every four years through an application process. ACE expect Museums to deliver activity that aligns to their investment principles. The next round of submissions for 2023+ will be in 2022. There is always a risk that the funding is not renewed or is renewed at a lower level than previously, it is unlikely to increase but may depend on the settlement received through the Governments spending review. Part of this process will include BMT's submission of detailed information to meet the Museums Accreditation Scheme criteria.

Grants from public funds and trusts/foundations form the majority of BMT's fundraising income averaging 89% since 2012. All support project work aligned to BMT's business plan. Grant funding applications are made to pre-set deadlines, through varied application processes and wide-ranging criteria. Grant management and reporting processes are similarly varied.

BMT grant funders who have made significant contributions since 2012:

- Millennium Point Trust – an annual grant to support projects at Thinktank, since 2012 this grant has reduced from £500k p/a to £100k in 2021/22.
- Arts Council England – BMT received two major cultural recovery fund grants (total £2.7m) during 2020/21 to support the Covid-safe reopening of the museums, enabled their workforce and IT systems to adapt to new ways of working, new exhibitions and displays, digital and/or distanced outreach and learning programmes, and investments to increase income generation in the short and medium-term. Without this funding BMT would have ceased trading.
- National Lottery Heritage Fund – BMT has received 7 grant awards from NLHF since 2012 ranging from £10k-389k. Heritage project grants from £3k-£5m are currently available, BMT are likely to apply to them for funds to support the re-display of BMAG for when it reopens in 2024, without extra funding from NLHF or others BMT do not currently have a budget to redisplay BMAG.
- Garfield Weston Foundation – has made three significant project grants to BMT since 2012 (£250k-£600k). BMT cannot reapply to them for funds until the current project is completed in July 2022.

Recent sub £100K grants awarded include:

- A digital project to engage young people with heritage at Aston Hall to last up to 18 months (£42k)
- A science exhibition and redisplay project at Thinktank (£50k)
- A grant towards the conservation of a painting (£22k) – the whole project costs £50k
- Operation Earth, a science engagement project at Thinktank (£4k)

Future plans and direction of the charity 2022-2026

BMT's Outline Business Plan 2022-23 states that Co-CEO's Sara Wajid and Zak Mensah's brief is to make BMT more useful to more people and 2021/22 marked the first year of a 5 year transformation programme. BMT will:

- Secure Major Arts Council Grant funding for 2022-2026 with a value of approx. £6m+
- Engage existing relationship partners and seek new voices to reimagine our vision for BMT. The outcome will be a service direction that uses socially engaged practice. At its core will be a work programme that focuses on the needs of users.
- Experiment with reaching new audiences through local, national and international partnerships.
- Re-imagine who the buildings and collection are for, and collaborate with the people and communities who are critical to the future of Birmingham Museums for the next 50 years and beyond.
- Contribute to the goals of the Future City Plan.

- A public programme of exhibitions, and other onsite and online activity
- Collaborative research into the history and society of Birmingham
- Testing and deploying innovative approaches to museum and governance
- Brokering and advocating for the benefits of culture in the city
- Seek major funding support from trusts and foundations
- Grow our commercial income to allow us to reinvest in our assets

BMT will demonstrate a commitment to increase educational/outreach work through:

- A new public programme developed a programme to engage audiences online and offsite. Includes taking artworks and items from the collection into schools and communities, inviting Birmingham citizens to co-produce new displays for when BMAG opens in 2022, sharing content through our digital platforms, and delivering outdoor exhibitions.
- New online services and activity taking the outcomes of a new Digital Strategy forward
- New public participation in shaping the direction of the organisation under the leadership of its Co-CEOs
- The change in approach envisions a shift with decreasing education and participation numbers onsite, and increasing offsite and online attendance and participation.

BMT will continue to work closely with the Council to take all reasonable steps to protect the properties and collections. We have worked together to develop a set of condition surveys to aid prioritising essential maintenance, mechanical and electrical work across our properties. This work will support future applications to improve building infrastructure.

In October 2020, BMT and the Council submitted a joint bid for £5m from the Governments MEND grant Fund scheme towards major repairs and maintenance to BMAG. If successful, this will be a significant step towards improvements to the museum on top of the Council House complex rewiring works. The outcome is expected Feb 2022.

In addition to financial stabilisation and continuing to respond to the ever-changing landscape created by the pandemic, there are a number of major projects that will continue including:

- The rewiring of BMAG, which will see the building partially open to the public in 2022 with phased re-opening of the rest of the galleries by 2024.
- Commonwealth Games 2022, BMT will work in collaboration with local and international artists, organisations and communities to create a through a series of programs, events and exhibitions as part of the Commonwealth Games cultural programme.
- Taking forward the feasibility study for a new Museum for Science & Industry, The Birmingham Project.
- The next phase of the Museum Store project.
- Protecting the collection at the Museum Collection Centre which is impacted by HS2 works nearby.