



Legacy WM 5 Year Strategy Refresh June 2024



"Passionately serving our communities"

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Statement from Chair

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As we reach the midpoint of our five-year strategy, I am proud to reflect on the progress we have made and the resilience we have demonstrated in adapting to an ever-changing landscape. Our commitment to our core values and strategic goals remains steadfast, guiding us as we navigate challenges and seize opportunities that arise.

This business plan serves as a vital blueprint for our continued growth and impact, aligning our actions with our 2027 vision and our theory of change. We are dedicated to fostering meaningful social impact in our communities, ensuring that our initiatives not only address immediate needs but also contribute to long-term sustainable development.

Incorporating the United Nations Sustainable Development Goals into our framework, we aim to create a legacy that not only enhances the lives of those we serve today but also paves the way for future generations.

I am proud to be part of this journey as we will build a brighter, more equitable future for Birmingham and the West Midlands as a whole.

Thank you for your continued support and partnership as we work towards these ambitious goals.

”

Jesse Gerald
Chair – Legacy West Midlands



Statement from CEO



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This midterm review of our business strategy is timely as we have come on leaps and bounds within the last three years. A decision to employ an in-house bid writer has yielded substantial results as our income has nearly tripled, and our capacity to lead partnerships has been bolstered. In 2024, we secured £350,000 by leading three different partnerships involving nine organisations. This fulfils our ambitions of becoming an anchor organisation with a policy of 'bring it and share it', which enables us to support partner organisations, share resources and deepen impact in the local community. We have been successful in securing commissions on employment and health services and are now seeking national partnerships to build on our success. Our ambition remains to become an Arts Council England National Portfolio Organisation, and we remain committed to developing the nearby St. Michael's Church into a community hub. Our plans to become a Registered Provider of housing is steadily progressing.

We have been based at Soho House Museum and Visitor Centre, which is a part of Birmingham Museum Trust, for the last ten years and we have now become keyholders. This enables us to have greater access to the site with the ability to hosts out of hours events and offer coworking facilities for local organisations.

This growth has enabled us to employ more staff and develop our capacity to manage the additional resources. However, this has not been without its challenges as growing pains have had to be managed and we are grateful to have new Trustees to support us. We have moved our accounts year to 31st March as we gear up our next phase of our development and set ourselves up to have an income of more than £1 million.

*We remain ambitious for our communities and have reviewed our strapline with staff, Board members and volunteers selecting **'passionately serving our communities'**.*

This growth could not have been realised without the tireless dedication of our staff team, volunteers and Trustees who always go beyond the call of duty. I would like to extend my deepest gratitude to them.

Aftab Rahman
CEO – Legacy West Midlands

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Introduction

Legacy WM is a Charitable Incorporated Organisation based in north-west Birmingham delivering services on health and wellbeing, arts, heritage, young people and housing. We began in 2010 with a focus on local heritage – since then our work has grown in scale and scope, with an ambitious agenda for our communities.

At the halfway point in our 5 Year Strategy, this revised Business Plan reflects our responses to some of the change and disruption of the past 2.5 years. Whilst we have emerged from the initial devastating impact of Covid 19, Birmingham communities experience disproportionate adverse outcomes, further worsened by inflation and the cost of living, alongside the City Council Section 114 notice (effective bankruptcy). International economic factors also reverberate at the local level and have complicated delivery, with imposed austerity cuts to statutory services and council budgets. In aggregate these factors have compounded the challenges faced by the communities we serve. The election of a new executive and ministers of state provides an appropriate juncture for a reassessment of our strategic approach.

We are finding new ways that we can work in partnership to ensure that we can have a greater collective impact. We are placing a greater emphasis on partnership work and our role as a community anchor organisation. This is inspired by the sentiment “if you want to travel quickly, travel alone. If you wish to travel a long distance, travel in a group.” For example, by sharing skills and resources in this manner, we established and incubated Flourish, a cross-sector healthcare partnership which has supported the health needs of communities across the West Locality for the last two years and is now working more independently over time.

Over the last 2 years we have implemented a new staffing structure and we will consider adopting a group structure to support our ambitions in the future, including on housing. Flourish has become

a CIC and now operates independently supporting local people to access the healthcare they need. Flourish has become a CIC and now operates independently supporting local people to access the healthcare they need. This initiative has garnered an NHS Race Equality Award at the 2023 HSJ Awards. Also, our exemplary volunteering has been recognised with a King’s Award for Voluntary Services in the same year. Our work with young people has expanded and service users have established their own youth forum Our Legacy, which is informing and co-designing our offer to young people.

We have started the process of developing St. Michael’s Church Handsworth into a community and arts hub in partnership with the Church of England. We hope this rejuvenated community venue will have a transformative effect on the neighbourhood, realised over a 5-year timeline of redevelopment and consultation. This in turn forms part of a wider vision for this part of Birmingham as a thriving and aspirational place to live, counteracting decades of stereotyping and chronic underinvestment.

Our arts strand is developing, and we have installed public arts installations along the canal route. Building on this, we have brought together a partnership called Journeys with other local arts organisations which has proven successful in attracting funding. Despite some diversification in income sources, we remain overly dependent on grant funding and our aim is to develop social enterprises to generate income. Efforts to improve arts provision for diverse communities has led to the creation of a Bangladeshi Artist Development Agency (BADA), which will produce culturally specific arts output intended to partially redress the imbalance in mainstream arts representation, whilst embodying our commitment to our shared Commonwealth heritage. This will be realised via Bangla Week themed activities as part of Inclusive Communities and building on the



“Working with LWM has been a breath of fresh air – such a diverse, open minded, flexible, curious and creative organisation, utterly committed to reducing health inequalities. We’re so glad to be building a lasting partnership with you!”

Amy Maclean – Chair, West Birmingham ICP Development Lead

achievements of the Freedom 50 celebrations that included public exhibitions.

In the last 2.5 years we have increased our income (£345,827 in 2021, £480,805 in 2022, £564,073 in 2023, with a higher amount projected for 2024), sustaining a larger team of full-time, part-time and sessional staff. Our continued partnership with Birmingham Museums Trust means we are now entrusted with managing the Soho House Visitor Centre, enabling us to deliver more activities on site and support our growing staff team. We remain ambitious and have set the goal of increasing our income to around £750,000 in 2024 and in three years we aim to increase this to £1 million.

In an effort to acknowledge our position with globalised networks and the bonds of heritage

that connect communities, we have adopted 5 of the UN Sustainable Development Goals that enmesh our agenda with that of international NGOs and philanthropic organisations.

To date our Freedom 50 charity bike tours and appeals have raised £100,000 towards building an eco-school in Bangladesh. We have set goals to raise funds to build homes in Bangladesh for some of those worst affected by climate change. Meanwhile our Chair is leading an initiative building borehole water pumps in The Gambia. Over time, we will raise our international profile whilst retaining the core mission of community service and cohesion.

What We Do

Current strands of work – *maintaining commitment to core services*

Each strand of work that we have adopted corresponds with an identified social need and has been iterated upon to devise solutions for generating social impact whilst maintaining cost efficiencies. This retrenchment of our core offer to service users carries forward lessons learned, rather than simply shifting our focus from one topic to another in succession.

How do we approach the social need identified for each strand?

The initial strategy document defined a range of strategic outcomes and goals that we have striven towards in recent years. The post-covid landscape has been further complicated by instability in the national economy and supply-side shocks due to global conflict and logistical barriers. Increasingly, Legacy WM is offered statutory contracts that comprise some of the roughly £2.5bn of public funds divested for work undertaken in our sector. Local economic recovery has risen in salience due to successive adversarial policy choices and 'zero-sum' budgeting by the local authority following issuing of Section 114.

Intended long-term outcomes – community cohesion, increased employability, higher rates of social engagement, reported increase in service user wellbeing, increased engagement with statutory services, increased efficiency and improved targeting of partner services, school community benefits, increased use of green spaces, decrease in reported feelings of marginalisation.

Health & Wellbeing

- Family Fit
- Health MOTs
- Grassroots Initiatives
- Public health emergencies

Heritage

- Every Journey Matters schools project
- Heritage Trails
- Cultural Immersion Training (NHS)

Arts

- Roundhouse to Chance Trail
- BADA
- Cultural Action Area
- *Journeys* arts partnership

Housing

- Cohousing
- Housing 21
- Community development
- Asset transfer

Young People

- Our Legacy youth forum
- Youth badminton provision

Community Anchor

- Consortium bids
- Funds handling
- Cross-sector partnerships

Serving Communities

Why us?

We have local knowledge and backgrounds, growing up, going to school and living in the communities we serve. We have decades of collective experience serving our neighbourhoods that means we can devise hyperlocal provisions with a high degree of relevance and cultural sensitivity.

Why here?

This area of Birmingham is subject to marginalisation and chronic underinvestment that necessitates third sector interventions to uphold and improve wellbeing and quality of life for local people. We seek to preserve the unique cultural legacy of the area through arts, heritage and cultural practice. As a global city, Birmingham is a fantastic base for our ambitions further afield, with genuine links with diaspora and the Commonwealth.

Why now?

Austerity and 'the Big Society' placed the onus on local people to 'do more with less', we responded to this challenge by becoming a diverse and capable organisation that can support local people despite reduced local authority budgets and constrained state spending.

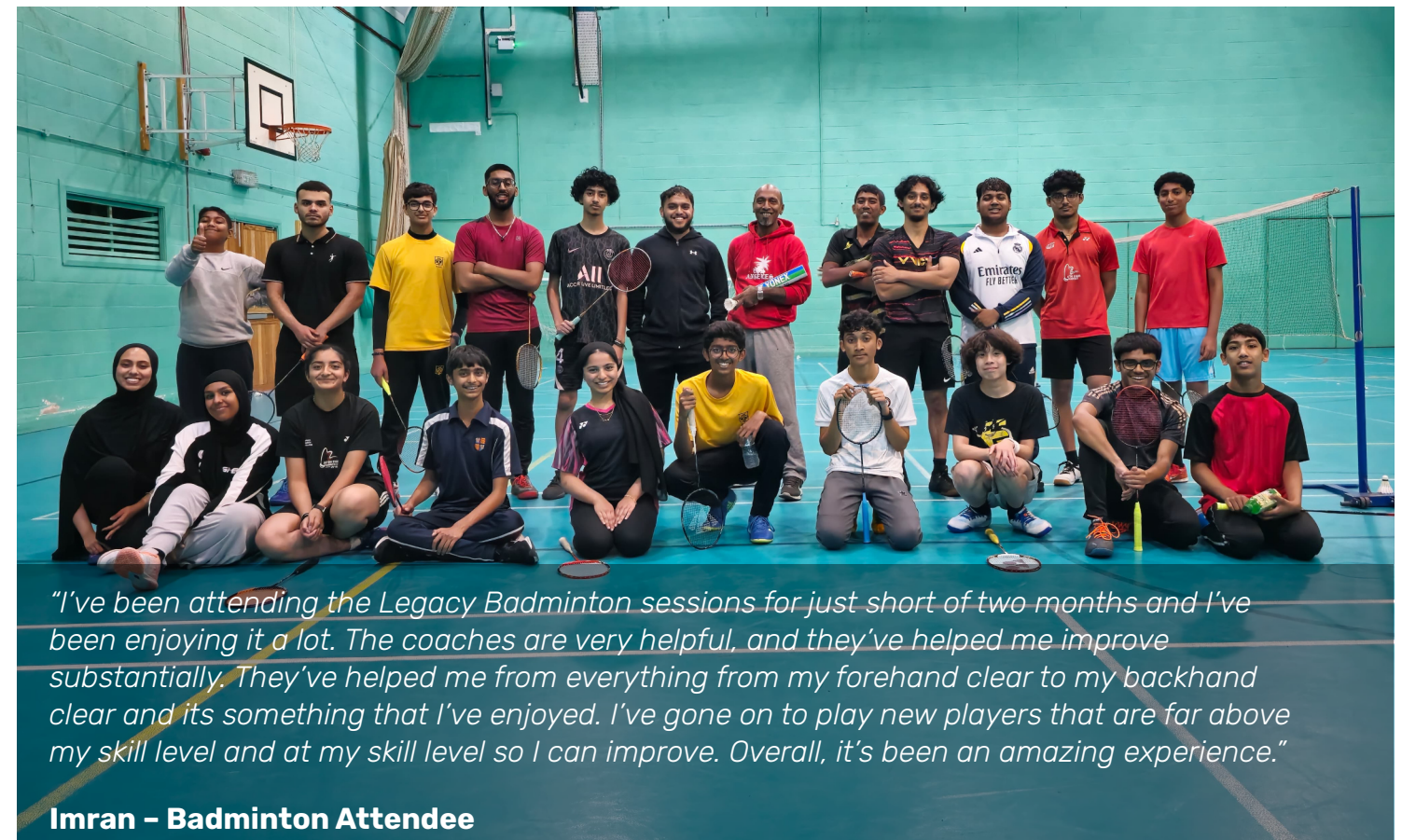
Why this work?

Human lives are complex, and the communities we serve reflect the diverse life experiences, faiths and industries of north Birmingham. Our work has grown organically, acquiring new specialisations and capabilities that enable us to make targeted interventions on a range of social themes.



"I have lived in Lozells all my life and I do not drive or have any form of transport to get me anywhere so when I went on the residential with Legacy it was the best thing I ever did"

Aslima – Service User



"I've been attending the Legacy Badminton sessions for just short of two months and I've been enjoying it a lot. The coaches are very helpful, and they've helped me improve substantially. They've helped me from everything from my forehand clear to my backhand clear and it's something that I've enjoyed. I've gone on to play new players that are far above my skill level and at my skill level so I can improve. Overall, it's been an amazing experience."

Imran – Badminton Attendee

Core Values



Our values are predicated on the collective lived experience of our workforce and service users, determining the position and approaches we take.

- We believe in the great potential of community-driven localism, with an ambitious agenda for social change leading to empowerment.
- We build relationships based on trust and integrity regardless of background, to realise positive outcomes.
- We are accountable to the individuals, communities and families we serve.
- We facilitate a person-centred workplace culture, enabling our staff team and volunteers to flourish.
- We will act with partners to realise social outcomes within a cross-sector network of organisations, demonstrating leadership where appropriate as an anchor organisation.
- We will seek to innovate and take considered risks to continuously improve service delivery.
- We will uphold these values when operating both as a registered charity and income generating organisation.

“

My experience volunteering has been nothing short of inspiring – local artists, and community leaders, has encouraged me to dig deeper into the socio-political histories of Birmingham. Working alongside staff has been a grounding experience for me. I feel more capable to engage with the world critically, consciously, and optimistically.

Canaan – Artist

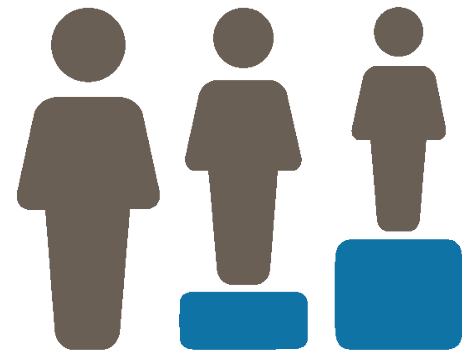
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Strategic Goals

These directives underpin the strategic orientation of our work and presents the core components of our vision for social change.



Offer a **holistic** range of services for local people, supporting them in leading happy and fulfilling lives.



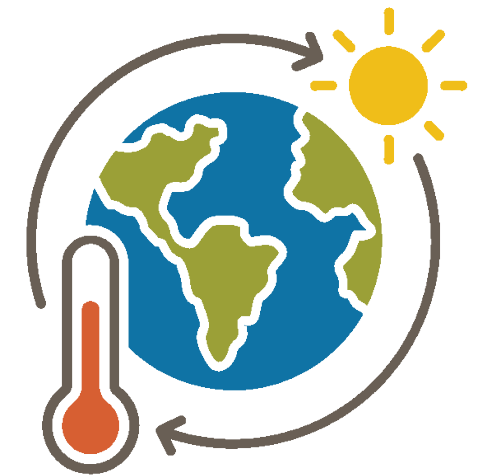
Counteract **marginalisation** through equitable access to these services and enriching experiences, in turn improving **community cohesion**.



Recognise the interwoven **histories** we share, utilising aesthetic and **heritage** practice to build mutual understanding and acceptance.



Work with existing **healthcare** infrastructure to improve community **wellbeing** by engaging people near to where they live in an **accessible** and **equitable** manner.



Take action on **climate change**, making our communities more **sustainable** and helping communities **overseas** in countries worst affected by sea level rises, desertification and warming.



Vision for 2027 – Theory of Change

The archetypal service user journey outlined below can be considered as emblematic of a **person-centred** theory of change. Many of our staff represent this route, originating from different walks of life. People may begin their journey with Legacy WM as service users, taking ownership through volunteering and codesign and realising outcomes within their community. However, this is not to infer a linear progression, or that engaging at one level or another is necessarily preferable or appropriate for the individual in question.

1) Inclusion – We welcome service users to access appropriate services and accessible provisions that are predominantly free to access. We strive to ensure that a wide range of people can get involved, considering their needs, wellbeing and personal goals.

2) Participation – We seek to motivate and inspire people at every stage in their lives. With a stake in their personal journey, we help service users gain experience and improve their employability. Our 2023 King's Award for Voluntary Service recognises the pathways we have created for service users who wish to give back to their community in ways large and small.

3) Empowerment – Realising social outcomes by empowering communities to tackle social issues at the grassroots. This is achieved through a fundamental belief in the potential of local people to make interventions that are often timelier and more effective than those of external agencies. Localism and indeed hyperlocalism are integral to our model, facilitating altruistic social networks.

4) Representation – Ensuring our staff team represents our communities, including individuals who have progressed through the volunteer pathway. Elsewhere, we support individuals into paid employment and upskilling via various initiatives. These individuals can be considered ambassadors for the change that we make within communities, representing the output of our theoretical model. Positive representation is also achieved collectively through the running of projects that reflect, include and originate from within diverse communities.



"Volunteering for Legacy WM has been an incredible experience. The respectful and friendly environment of Legacy WM allows you to flourish in what you do best. Working in marketing has not only made me more confident in my skills but awakened a new passion for it as I can use it to help people and even give back to my community. Legacy WM ensures that I and everyone else like me, are proud of our cultures and continue to be."

Ikra, Volunteer

Four Step Service User Journey



1) Inclusion



2) Participation

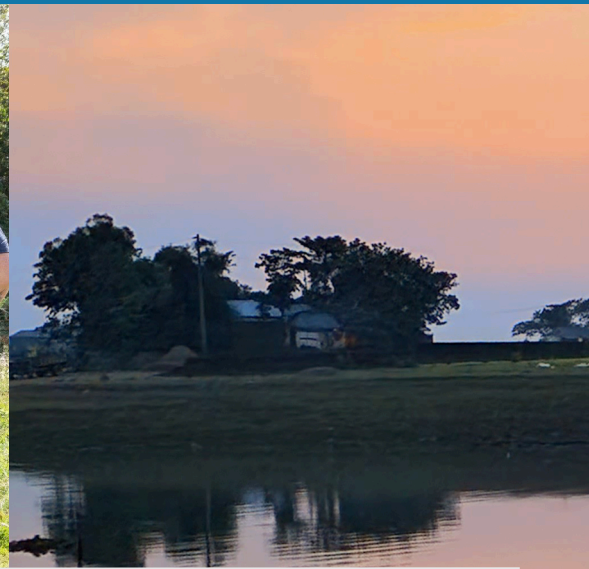


3) Empowerment



4) Representation

UN Sustainable Development Goals



3 GOOD HEALTH
AND WELL-BEING



5 GENDER
EQUALITY



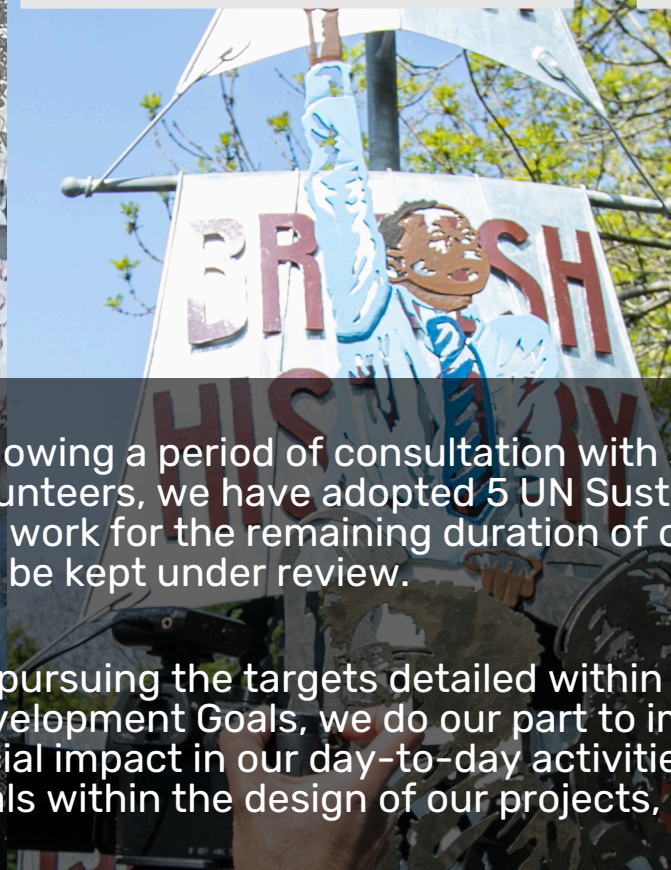
6 CLEAN WATER
AND SANITATION



11 SUSTAINABLE CITIES
AND COMMUNITIES



13 CLIMATE
ACTION



Following a period of consultation with staff, Trustees and volunteers, we have adopted 5 UN Sustainable Goals to pursue in our work for the remaining duration of our 5 Year Strategy – this will be kept under review.

By pursuing the targets detailed within each of our Sustainable Development Goals, we do our part to improve lives and generate social impact in our day-to-day activities. We will embed these goals within the design of our projects, creating a unified outcome.

How We Apply Our SDG Goals

1. Good health and wellbeing

We are committed to continuously working to improve health outcomes at a local and citywide scale. We work with the NHS and healthcare partners to provide award-winning programmes around healthcare systems navigation, helping people find the care they need for themselves and their families, regardless of situation. Read more about our community health programmes Flourish and Family Fit [here](#).

2. Climate Action

Climate change, global warming and the increased frequency of extreme weather threatens the fabric of our society and the wellbeing of communities and economies alike. As an existential challenge, we are obligated to take action regardless of the predominantly local focus of our work. This is being achieved via local green social prescribing projects that help local people to consider the domestic food cycle and home-growing using espalier in urban gardens. Elsewhere, we are helping artists to consider the environmental impact of their work with ringfenced funding, exploring alternative methods, media and materials as part of BADA.

The interrelation of geopolitics with climate has also resulted in further instability and macroeconomic headwinds. Additionally, our global perspective involves links with overseas communities that represent our heritage.

3. Sustainable Cities and Communities

Through our work we are exploring new housing plans, energy solutions and rejuvenation of public spaces to create the change we want to see in our communities. This includes feasibility studies and research and interpretative artworks made possible by our funders. Our collaboration with Housing 21 has resulted in the construction of bespoke supported living for elders in our community, seeking to tackle the housing crisis through community consultation and genuine inclusion in the planning of prospective housing sites. We have also received funding from the Oak Foundation to pursue an independent housing agenda, researching viable alternatives to private tenancy and council housing.

4. Achieve Gender Equality and Empower all Women and Girls

We are proud to run projects catering specifically for women and girls, as well as facilitating the work of female practitioners and creatives. Our health and wellbeing provisions also include work on women's health and equity in everyday life. With support from The Tudor Trust we are currently delivering a women's empowerment programme, featuring a holistic calendar of activities designed to offer opportunities for socialisation, learning new skills and worthwhile experiences.

5. Clean Water and Sanitation

In this special undertaking, our Chair Jesse Gerald is raising money through his photography to fund new borehole wells in remote villages in The Gambia. We celebrate the work of our Board and senior staff internationally to improve local water supply, which will improve the lives of people facing economic hardship and are reliant on subsistence agriculture. Click [here](#) to learn more about Jesse's project. Here at home, we are partnered with the Canal and River Trust, beautifying and celebrating the heritage of our world-famous canals which once carried freight from across England to the workshops and factories of the Midlands. We have adorned the canalside route with artworks from local creatives, encouraging local people to enjoy travel and exercise on the canals. We also participate and help deliver Nowka Bais each year, a vibrant regatta of Bangladeshi dragon boats at Edgbaston Reservoir, itself a precious source of clean water for Birmingham.





"Passionately serving our communities"

