

# **Strategic plan for the Association of British Orchestras**

**2016-2019**

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## Introduction

This Strategic Plan follows a series of strategic plans published by the ABO over the past two decades, with the most recent dated 2012-15. Former plans covered the periods 2008-2011, 2003-2006, 2000-2003, 1997-2000 and 1993-1997.

The previous Strategic Plan was extended to 2016 to take account of significant changes to the board at the AGM in November 2014, the General Election in May 2015, and uncertainty in relation to public funding for culture across the UK.

Unlike in 2011, when a member survey was carried out to assess satisfaction in the services provided by the ABO, no such survey was carried out in 2015. Anecdotally, through conversations at ABO events, members appear to be happy with what the ABO provides, and there is no great urge for radical change.

Members want their association to continue to deliver a consistent programme of activity while being responsive to the opportunities and threats that may have an impact on the orchestral sector. For the vast majority, being an effective champion while also creating an attractive and worthwhile annual conference and other events are seen as the major activities the ABO should be pursuing. Most are mindful of the constraints the ABO faces in terms of financial and staff capacity and are grateful for how much it is able to achieve on its limited resources. A key theme however that has emerged in the past two years is the need for a development programme for emerging leaders, to help build resilience among our members in the long term. This suggests there needs to be a rebalancing within our objectives of Connecting, Championing and Developing.

The Association remains in good financial shape, with a satisfactory level of reserves in relation to its turnover, and it has coped with the loss of regular funding from Arts Council England in 2011, which was alleviated by receipt of management fees as accountable body for the Family Arts Campaign from April 2012 and a grant from the ABO Trust to support the costs of its education consultant. Income from the Family Arts Campaign will cease from 1 April 2016, and consideration will need to be given by the Board to ensuring that the Association does not begin to incur an annual deficit.

Much of this plan is based on continued delivery of the Association's activity while setting an agenda for priorities over the next three years. It will be reviewed on an annual basis by the board to ensure it remains relevant and achievable.

The intention of the Plan is to set a vision for what the Association will look like in April 2019 and beyond. It sets some expectations for both the board and its members, especially in terms of the Association's future finances and what it can reasonably deliver with such a small team. It is clear that a properly resourced Association will reap dividends in terms of benefits for members.



**Kathryn McDowell**

Chair

April 2016

## Background

The ABO was founded in 1947 as the Orchestral Employers Association, primarily to negotiate with the Musicians Union and other bodies on behalf of its membership, which consisted almost entirely at that time of those orchestras receiving annual funding from the newly established Arts Council of Great Britain. In 1982 the Association took on company status and became the Association of British Orchestras. The ABO's negotiating function was reduced considerably in 1989, when the contract orchestras ceased to negotiate collectively. The ABO celebrates its 70<sup>th</sup> anniversary in 2017.

Under the inspirational leadership of Libby MacNamara, the ABO developed during the 1990s in other areas, expanding its role as a development agency for the orchestral sector. Highlights of this period included the ABO's national education project *The Turn of the Tide* in 1993, which encouraged the development of education programmes within orchestras; *The Missing Rungs*, a training programme for orchestra managers seeking advancement to senior management level; and *National Orchestras Week*, a profile-raising national event that took place each Spring.

With the end of various sponsorship agreements, staff illness and an over-stretched office, the new director, Russell Jones, appointed in 2002, had to oversee a contraction in activities and take steps to restore the ABO's finances. Funding to clear the accumulated deficit was granted from Arts Council England's Stabilisation programme and in 2004 the ABO became a Regularly Funded Organisation of Arts Council England, enabling it to return to a complement of three full-time members of staff. This funding ceased in 2011.

A new Director, Mark Pemberton, was appointed in July 2007 and the programme of activity continued along similar lines supported by the same number of core staff. Following a decade of support from our landlords Shaftesbury plc, the ABO moved into new premises at SOLT's premises in Covent Garden in October 2011, where it has access to a suite of meeting rooms and has generated more effective ways of working.

The ABO's role encompasses a diverse range of activities designed to support the development of the UK's orchestral sector. The ABO's advocacy role in recent years, in particular in relation to resolving the threat posed by the threatened imposition of Class 1 NI for freelance musicians and lobbying successfully for extension of Creative Tax Relief to orchestras, is widely cited as of great value to the membership.

The ABO Conference, the key networking opportunity for the membership, has grown in scale and ambition since its inauguration in 1986, and has developed into the UK's leading conference for the classical music industry. Building on the success of the annual conference, the ABO now also offers an extensive programme of specialist managers meetings, seminars and training events.

Various initiatives have been generated since 2007:

- Between 2009 and 2011 the ABO commissioned DHA Communications to produce a communications campaign, which saw the publication of briefings and film clips and an increased presence in national and trade media. The objective of the campaign was to influence the outcome of the Comprehensive Spending Review in 2010, and the DCMS's decision to restrict cuts to ACE "frontline" organisations to 15%, and the subsequent settlement for orchestras, opera and ballet companies which saw them retained as National Portfolio Organisations, could

be judged to have been a positive result of the campaign. The ABO subsequently commissioned DHA Communication to produce a statistical survey of ABO members in 2013, which was published to coincide with the ABO Conference in January 2014.

- In 2014/15 the ABO again worked with DHA Communications on its #orchestraseverywhere campaign on social media, drawing attention to our members' contribution to the creative industries and the community. While it is hard to quantify the benefits, it is arguable that reminding government that our members operate within the wider creative industries helped support the argument for extension of Creative Tax Relief.
- An All Party Parliamentary Classical Music Group was launched in 2009 and has held frequent meetings in parliament with guest speakers.
- The ABO actively engaged in plans for *Music Nation* in March 2012, a Countdown Event for the London 2012 Festival, the finale of the Cultural Olympiad. This generated positive support for a regular celebration of British orchestras, both professional and amateur, which this has not subsequently materialised.
- The Healthy Orchestra Charter was launched with a fanfare in 2006, generated a head of steam, but then needed work to sustain interest from members. The Charter was re-launched in 2011 with reduced financial support from Help Musicians UK, and funding ceased in 2012. The ABO continues to monitor our members' commitment to the health and well-being of their musicians and is currently working with the MU on producing guidance on focal dystonia.
- The ABO's partnership with industry green body Julie's Bicycle led to the publication in 2010 of the *Green Orchestras Guide* and *Moving Arts: managing the carbon impacts of our touring - Volume 2: Orchestras*. A Green Charter was launched to members in 2012.
- The ABO has developed a close relationship with the British Council, which led to its active participation in the UK-Brazil Transform Orchestra Leadership Programme. ABO staff and representatives from its members attended conferences in Belo Horizonte in May 2014 and Rio de Janeiro in May 2015 to help Brazilian orchestra managers re-envision their role as leaders and managers and develop their own association.
- In 2015 the ABO secured funding from the Foyle Foundation to build an online database of works commissioned by its members since 1990, prior to the launch of PRS for Music Foundation's Resonate programme in 2016, which will provide funding for ABO members wishing to give repeat performances of new works.
- In 2015 the ABO launched Find Your Way, a new professional development programme that offers tailored coaching and mentoring for aspiring leaders. In 2015-16 the ABO will learn from this pilot year to build fuller and to explore funding to support it. An open selection process will be launched in the summer of 2016.
- In February 2012 a consortium led by the ABO was awarded £1.1 million to develop the Family Arts Campaign, and leading to the employment by the ABO of a Campaign Manager and Campaign Administrator. The Campaign and its staff will move to a different accountable body from April 2016.
- The ABO has a tradition of mounting research initiatives, with a series of important industry reports being produced, such as the highly influential report on noise damage to musicians, *A Sound Ear*, with its follow-up, *A Sound Ear II*, published in 2008. In 2009 it published *Live The Experience*, which mapped the provision of live concert experiences for children during their time at school, followed by a mapping of provision in Scotland, funded by Creative Scotland. An

evaluation project funded by Paul Hamlyn Foundation led to the publication of *Making the Difference* by Annabel Jackson, Evaluation Consultant, and a training course for education personnel.

- The ABO continued its much-celebrated music education programme. The Early Years Cluster Programme ran from 2006 to 2009, funded by Youth Music, involving partnerships between professional orchestras, music organisations, Surestart Children's Centres and Music Services in 8 different locations throughout England. Several orchestras have continued work in this area, and in 2011 the ABO participated in Youth Music's Spotlighting Programme, a process for enabling the sharing of practice to raise standards and the many different approaches for supporting children and young people's music making.
- Following the demise of NAYO in 2010, the ABO created a new category of membership for Youth Orchestras. In 2013 it secured funding from Youth Music to support its Professional Partnerships programme, which mapped youth orchestras in England and helped build local partnerships between professional and youth orchestras. A similar mapping exercise took place in Scotland in 2014, supported by Creative Scotland.
- The ABO website was re-designed in 2013 with enhanced functionality for booking events and integrated social media. The ABO has over 5600 Twitter followers and 1850 Facebook likes.

## MISSION AND OBJECTIVES

The ABO board agreed the following **mission statement** in April 2016:

**The ABO's mission is to enable and support an innovative, collaborative and sustainable orchestral sector. It exists to provide advice, support, intelligence and information to the people who make British orchestras a global success.**

The key **Strategic Objectives** of the Association cover three areas of activity:

- **Connecting**
- **Championing**
- **Developing**

Using the framework of the mission statement, our key **aspirations** for 2016-2019 will be to deliver on these key objectives through:

- **Connecting** members to other members and the wider industry through networking opportunities, keeping our members well-informed and up-to-date with best practice to help build resilience and financial sustainability.
- **Championing** British orchestras and the wider membership, raising their profile and influence with key stakeholders and the British public, through political engagement, the media, social media and stakeholder bulletins. We will track and influence the development of cultural policy from the European Union, UK government, local government and devolved administrations, and advocate the value of public and private investment in the orchestral sector.
- **Developing** the skills and knowledge of our members' staff, including providing and signposting to high quality professional development opportunities for all tiers of management and musicians and nurturing emerging leaders.

We will apply the same key objectives to our **youth ensemble** membership:

- **Connecting** the youth ensemble membership with each other and with the professional sector, keeping them well-informed and up-to-date with best practice to help build resilience and sustainability.
- **Championing** youth ensembles, raising their profile and influence with key stakeholders and the British public, through political engagement, the media, social media and stakeholder bulletins. We will track and influence the development of cultural policy and advocate the value of support for youth ensembles through local music education bodies and private investment.
- **Developing** the skills and knowledge of those who work for or volunteer their time to support their local youth ensemble.

Our **priorities** and **outcomes** for 2016/19 will be to:

- Represent the interests of our members at the highest levels of government, engage positively with key stakeholders on opportunities for the sector, and ensure that the arguments for continued public and private investment in orchestras are made, backed by evidence and examples of excellence, reach and value. A priority will be working with the government and other stakeholders on re-energising corporate support for arts organisations, and contributing to the championing of continued local government funding.
- Work with the Musicians Union and Conservatoires UK on improving the working relationship between management and musicians and ensuring the supply of a skilled, qualified and diverse workforce. A priority will be embracing the government's challenge for greater action on diversity in the orchestral sector through partnership working with key stakeholders.
- Maintain and develop the conference's status as the leading classical music conference in the UK and provide a range of networking opportunities for members, to enable sharing of best practice and enhance knowledge and intelligence across the sector.
- Build on the global reputation of the ABO and its members through representation at international events, and gather intelligence on developments in the international orchestral industry for the benefit of the membership.
- Implement a development programme for emerging leaders to help build a sustainable orchestral sector in the long term, and deliver a portfolio of CPD opportunities across the range of management skills.
- Maintain the ABO's overview of orchestral education programmes, influence national policies on music education, encourage and pursue funding opportunities for collaborative education projects, and monitor and enhance support for youth ensembles through music education hubs and other national music education agencies.

These will be achieved through the following **activities and targets** during the three year period.

## Connecting

Activity	Implementation	Key Performance Indicators
Conference	<ul style="list-style-type: none"> <li>Conference retains its status as UK's leading classical music conference</li> </ul>	<ul style="list-style-type: none"> <li>Conference takes place and secures income and delegate numbers in line with or above budget</li> <li>Quality of content and speakers, media interest and international attendance are increased</li> </ul>
Networking	<ul style="list-style-type: none"> <li>Offer SMMs across range of manager roles</li> <li>Provide information for education managers and youth ensembles</li> <li>Hold annual Chief Executives Forum/AGM</li> </ul>	<ul style="list-style-type: none"> <li>SMMS to take place during Spring and Autumn with high quality content and speakers</li> <li>Produce monthly education and quarterly youth ensemble bulletins</li> <li>CEOs Forum held each November</li> </ul>
Wider industry/memberships	<ul style="list-style-type: none"> <li>Connect to key national and international industry bodies via membership eg. PEARLE</li> <li>Connect to wider music/arts bodies nationally and internationally</li> <li>Connect to key education bodies eg. MEC, Music Mark, GLA, OFSTED</li> </ul>	<ul style="list-style-type: none"> <li>Pay annual membership fees where appropriate</li> <li>Attend national and international meetings and events and disseminate information to members</li> <li>Education Consultant attends key education seminars and conferences and disseminates information to members</li> </ul>
Music education	<ul style="list-style-type: none"> <li>Respond to Government and other policy maker consultations and research</li> </ul>	<ul style="list-style-type: none"> <li>Education managers consulted and coordinated responses submitted</li> </ul>
Youth ensembles	<ul style="list-style-type: none"> <li>Connect youth ensembles with professional orchestras</li> <li>Create opportunities for youth ensemble members to connect with each other</li> </ul>	<ul style="list-style-type: none"> <li>Regional events hosted by ABO members</li> <li>Dedicated sessions scheduled at annual conference and other networking opportunities</li> </ul>
Website	<ul style="list-style-type: none"> <li>Ensure the website serves as a resource for connecting members to the ABO</li> </ul>	<ul style="list-style-type: none"> <li>Website to remain fresh, relevant and easy to use</li> </ul>
Social Media	<ul style="list-style-type: none"> <li>Use social media tools to connect members and the public to the work of the ABO</li> </ul>	<ul style="list-style-type: none"> <li>Increase sign-up to social media feeds with target of 7000 Twitter followers by March 2017</li> <li>Develop social media strategy and explore other social media platforms to increase reach</li> </ul>
Update	<ul style="list-style-type: none"> <li>Monthly email update to members</li> </ul>	<ul style="list-style-type: none"> <li>Update circulated at beginning of the month</li> </ul>
Concerts/Events	<ul style="list-style-type: none"> <li>Staff to attend concerts and other events held by members, ensuring representation outside London</li> </ul>	<ul style="list-style-type: none"> <li>Include concerts/events attended in Update</li> </ul>

## Championing

Activity	Implementation	Key Performance Indicators
Communications/Public Affairs	<ul style="list-style-type: none"> <li>Attend meetings with key decision makers and represent the interests of members at national and international levels, including music education bodies</li> <li>Serve as secretariat to All Party Parliamentary Classical Music Group</li> </ul>	<ul style="list-style-type: none"> <li>Publish list of conferences, events and meetings attended in Update</li> <li>Distribute regular stakeholders newsletter</li> <li>Arrange regular meetings of APPG</li> </ul>
Legislation	<ul style="list-style-type: none"> <li>Monitor and influence legislation at national and European level</li> </ul>	<ul style="list-style-type: none"> <li>Respond to government consultations and attend meetings with government departments</li> <li>Attend PEARLE conferences and Live Performance social dialogue meetings</li> </ul>
MU	<ul style="list-style-type: none"> <li>Negotiate ABO/MU Casual Concerts/Freelance Musicians agreement</li> <li>Liaise with MU on issues of concern to members and develop joint agendas including Staying Happier for Longer</li> </ul>	<ul style="list-style-type: none"> <li>Conclude negotiations by 1 April each year or as soon as possible thereafter</li> <li>Ensure up to date agreements and guidance are available on the website</li> <li>Joint agendas developed to mutual benefit</li> </ul>
Key Facts	<ul style="list-style-type: none"> <li>Collect statistical data from full members in Autumn 2016</li> </ul>	<ul style="list-style-type: none"> <li>Board members to champion to respective sector of membership</li> <li>Publication of data for media and stakeholders in January 2017</li> </ul>
Youth ensembles	<ul style="list-style-type: none"> <li>Communicate the value of youth ensembles to national and local stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Regular meetings with key stakeholders</li> <li>Youth ensembles included in stakeholders newsletter</li> </ul>
Media	<ul style="list-style-type: none"> <li>Monitor relevant publications and websites</li> <li>Engage PR consultant and devise Comms strategy</li> <li>Develop partnerships with broadcast media</li> </ul>	<ul style="list-style-type: none"> <li>Monitor and disseminate via Update and bulletins</li> <li>Implement Comms strategy including broadcast media and issue press releases as required</li> <li>Produce presskit</li> </ul>
Awards	<ul style="list-style-type: none"> <li>Present ABO Award to individual or organisation that has made contribution to British orchestras</li> <li>Present Salomon Award in partnership with RPS</li> <li>Present Orchestra Manager, Concert Hall Manager and Artist Manager of the Year awards in partnership with Rhinegold</li> </ul>	<ul style="list-style-type: none"> <li>Award presented at ABO conference or other public event</li> <li>Award presented at concert</li> <li>Awards presented at conference dinner</li> </ul>

## Developing

The ABO has as an objective to signpost to and provide training and continuing professional development opportunities for all levels of orchestral management. It has been constrained from developing of its own full range of dedicated courses due to lack of capacity and resources, but continues to offer its much-praised entry level courses and has benefited through offering its members access to UKTA's suite of courses.

Following its conference in 2015, the ABO has committed to developing a programme for emerging leaders. Members recall with affection the Missing Rungs programme of the late 1990s and it is clear that a similar programme is required now to give the next generation of leaders the skills and know-how to build resilience and enterprise into the sector.

The ABO has embraced the challenge from DCMS for greater action on diversity in the orchestral sector and will work in partnership with key stakeholders to develop an action plan.

Members expect the ABO to be a source of information and advice on a range of issues and where applicable to be signposted to sources of expertise. It is an essential role for the ABO to provide such information with a view to relieving members of the burden of undertaking their own research. In addition, as issues emerge the ABO can take the lead in highlighting whatever may be over the horizon in order that the orchestral sector can be better informed and prepared. The ABO will work with specialist advisers to offer access for members to legal, tax, VAT and IP advice.

Activity	Implementation	Key Performance Indicators
Professional Development	<ul style="list-style-type: none"> <li>• Offer one day management courses</li> <li>• Provide access to UKTA courses</li> <li>• Extend networking and training opportunities to chairs and trustees</li> </ul>	<ul style="list-style-type: none"> <li>• Courses successfully delivered</li> <li>• Other courses developed in response to member need</li> <li>• Chairs networking events take place</li> </ul>
Seminars	<ul style="list-style-type: none"> <li>• Offer seminars and workshops on relevant topics as the need arises</li> </ul>	<ul style="list-style-type: none"> <li>• Seminars delivered successfully</li> </ul>
Leadership	<ul style="list-style-type: none"> <li>• Implement programme for aspiring leaders</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate outcomes of Find Your Way pilot and develop enhanced Find Your Way programme</li> <li>• Develop pan-European programme (dependent on funding from Creative Europe)</li> </ul>
Diversity	<ul style="list-style-type: none"> <li>• Carry out research and develop action plan</li> </ul>	<ul style="list-style-type: none"> <li>• Research commissioned in early 2016 and concluded by Autumn 2016</li> <li>• Research published and action plan launched at Conference 2017</li> </ul>

Healthy Orchestra	<ul style="list-style-type: none"> <li>• Promote Healthy Orchestra programme</li> <li>• Develop specific initiatives in collaboration with key stakeholders</li> <li>• Monitor impact of Noise Regulations on the sector</li> </ul>	<ul style="list-style-type: none"> <li>• Guidance on focal dystonia published in 2016/17</li> <li>• Healthy Orchestra programme continued through development of other initiatives</li> </ul>
Factsheets and Advice	<ul style="list-style-type: none"> <li>• Supply factsheets for members</li> <li>• Develop access to specialist advisers, subject to regular review</li> </ul>	<ul style="list-style-type: none"> <li>• Factsheets made available on ABO website</li> <li>• Specialist advisers in place by Spring 2016</li> </ul>
Careers	<ul style="list-style-type: none"> <li>• Provide careers information and advice</li> <li>• Encourage member to host careers events for aspiring managers</li> </ul>	<ul style="list-style-type: none"> <li>• Provide careers information on ABO website</li> <li>• Give careers lectures at HE institutions</li> <li>• Careers events held by members</li> </ul>
Resonate	<ul style="list-style-type: none"> <li>• Develop database of orchestral repertoire commissioned since 1990</li> <li>• PRSF to launch funding scheme for repeat performances</li> </ul>	<ul style="list-style-type: none"> <li>• Funding secured from the Foyle Foundation in 2015/16 and project manager appointed</li> <li>• Database and PRSF scheme launched in 2016/17</li> </ul>
Family Arts Campaign	<ul style="list-style-type: none"> <li>• Remain a member of the Family Arts Campaign consortium</li> </ul>	<ul style="list-style-type: none"> <li>• Network opportunities created within the membership and with other artforms</li> <li>• Family friendly activity and audiences developed across the membership</li> </ul>

## Governance

In November 2010 the board increased to 8 orchestra representatives supplemented by 4 co-opted directors. The Articles provide for a maximum of 12 directors (at least two-thirds of whom must be orchestra representatives). The constitution has been changed to bring the term of the co-opted directors into line with the orchestral representatives ie. up to 6 years, subject to annual appointment. The board will review what skills are required from prospective co-opted directors as vacancies arise.

## Membership

The past decade has seen relative stability in terms of the ABO's membership, with a decline in recent years due to the financial climate for members. Membership as at 31 March 2015 stands at 176, comprising 60 Full Members, 20 Associate Members, 21 Youth Ensembles, 29 Affiliate Members, 31 Corporate Members and 9 Individual Members. In 2015/16 the ABO launched a new category of Sole Trader membership, which currently stands at 6.

A review was carried out in 2012 of bands and subscription levels for Full Members, with a view to achieving a fairer spread between bands from 2013/14. This was implemented successfully with minimal impact on membership levels.

Members are encouraged to embrace a set of **shared values** as follows.

We believe:

- Our shared mission is to perform live music to the highest artistic standards for the widest possible audience
- In innovating, extending our reach, and growing our audiences
- That participation in music-making and music education are intrinsic to our organisation, helping nurture and make more diverse the next generation of music-makers
- In putting professionalism at the heart of our organisation, ensuring our musicians receive a professional rate of pay
- In investing in the skills, health and well-being of our staff and musicians
- In looking after the investment in our organisation from public and private sources responsibly, with integrity and transparency
- In supporting the collective voice of our association

Members will be made aware of these shared values at networking events such as the annual CEOs Forum and when applying to join the ABO.

## Staff

The following indicates the principal/lead responsibilities of the current ABO employee structure for core activities.

### **Director (appraised annually by the chair)**

- Leadership and management of the ABO's strategic plan
- Financial and fundraising strategy
- Representation to the wider industry and key stakeholders
- Conference planning and curation

- Planning of SMM and events programme
- ABO/MU Agreement and Staying Happier for Longer programme
- Company Secretary and Governance
- Trustee and secretariat of ABO Trust

### **Public Affairs Manager**

- Public Affairs communications and research
- Advice to members
- Statistical surveys of the membership
- Secretariat to the APPG Classical Music
- Conference organisation
- Healthy Orchestra programme
- Website and IT

### **Finance & Events Manager**

- Membership applications and subscription renewals
- Book-keeping
- Intern programme
- Specialist Managers Meetings, training courses and seminars
- Database and relevant website content
- Office management

### **Education/Youth Ensembles Consultant**

- Pursuing opportunities for funding for collaborative education projects
- Liaising with ACE, Creative Scotland, ACW and key music education bodies eg. Music Mark, MEC, GLA
- Tracking outcomes of National Music Plan and other government reviews
- Responding to government consultations
- Supporting the Education Managers group and follow-up actions, including monthly bulletin
- Developing music education events and seminars
- Researching music education delivery across the membership
- Developing and supporting the Youth Ensemble membership incl. regular bulletins
- Managing and exploring funding opportunities for Find Your Way leadership development programme and FLOE dependent on outcome of funding application

The ABO is also supported by a Finance Manager provided through its rental agreement with SOLT.

The ABO is committed to providing paid internships for those seeking work experience at the start of their careers. Interns will be given opportunities during a four month period to assist with the delivery of the annual conference, events, member engagement, data management, stakeholder newsletters and member bulletins.

During the first quarter of 2016/17 a review of staffing will be carried out to ascertain the right employee structure for delivering the programme of activity.

The ABO reaches its staging date for pension auto-enrolment in February 2017. A review of current pension arrangements will be carried out during 2016 to ensure that the ABO will be compliant.

## **Financial projections and resources**

The ABO's finances are in a satisfactory position. Turnover has stabilised at around £310,000 per annum and reserves stand at £178,837, an increase of over £100,000 since 2007. This has resulted from higher than expected surpluses on the conference and projects. Turnover increased substantially between 2012 and 2016 due to receipt of ACE funding for the Family Arts Campaign.

The board has agreed a reserves policy that aims for a minimum of three months' expenditure to enable the ABO to cover its liabilities in the event of dissolution. Any additional reserves may be used for legal advice, campaigns or research and development of initiatives for the benefit of its members.

The move to 32 Rose Street in October 2011 has seen a consolidation of expenditure on premises and financial management into a single rental fee. The lease ends in October 2016 and negotiations are underway with SOLT for a five year extension. Alternative premises will need to be explored to cover the possibility of notice being served by SOLT, and a contingency for relocation costs be budgeted for.

The attached financial projections take account of the activity outlined in the Strategic Plan. Following the move of the Family Arts Campaign to a different accountability body from April 2016, the ABO will incur a deficit in 2016/17 and therefore needs to take steps to explore alternative sources of income. The financial projections assume an increase in income from subscriptions, grants and projects.

## **Fundraising and Business Development**

The ABO has a history of successfully attracting funds from sponsors and trusts & foundations, particularly in the 1990s, when there was a busy programme of projects including National Orchestras Week and the BT commissioning scheme. During this time it employed a fundraising manager who not only secured funding for its activity but also the legacy to the ABO Trust which has created an endowment of £500,000, the income from which supports some of the ABO's activity such as its educational programme and the ABO/RPS Salomon Award.

In recent years the board has taken the view that the ABO should not be seen to compete with its members in terms of fundraising for core activity, but has approved applications for funding for special projects of benefit to members, such as from Help Musicians UK for the Healthy Orchestra Charter, the Paul Hamlyn Foundation for Making The Difference, Youth Music for Professional Partnerships, Creative Scotland for the Youth Ensembles survey project in Scotland. and the Foyle Foundation for Resonate. It has also received annual sponsorship of the conference from Classic FM since 2003.

With the loss of income from the Family Arts Campaign, and pressure on our members' finances making above-inflation increases in subscriptions potentially unwelcome, the board needs to give consideration to how the ABO can avoid incurring annual deficits through diversifying its income. The ABO should ensure that funds secured for projects should contribute to administration costs.

The ABO Trust has expressed interest in building on the legacy it received in 2012. A fundraising and business development strategy focusing on building income for the ABO's activity, in particular for its Professional Development programme and events, and for enhancing the ABO Trust's endowment, should be given consideration.

The ABO should also explore areas for business development. These may include affinity schemes for members, enhancement of earnings from the conference and other events, creating leadership programmes for orchestras in the UK and emerging markets, and developing new categories of membership.

<b>ABO BOARD 2016/17</b>		
<b>Kathryn McDowell CBE Chair</b>	Managing Director	London Symphony Orchestra
Catherine Arlidge MBE	Sub-Principal Second Violin	City of Birmingham Symphony Orchestra
Andrew Connolly	General Manager	BBC Concert Orchestra
Michael Eakin	Chief Executive	Royal Liverpool Philharmonic
Peter Helps	Chief Executive	Sinfonia Viva
Sophie Lewis	Chief Executive	Sinfonia Cymru
Carol Main MBE	Director	Live Music Now Scotland
Ginny Macbeth	Director	Macbeth Media Relations
Roy McEwan OBE	Chief Executive	Scottish Chamber Orchestra
Louise Mitchell	Chief Executive	Bristol Music Trust
John Summers	Chief Executive	Hallé Concerts Society
Matthew Swann	Chief Executive	City of London Sinfonia

<b>ABO STAFF</b>	
Mark Pemberton	<i>Director</i>
Dawn Day	<i>Projects Manager</i>
Jenny Lomas	<i>Finance &amp; Events Manager</i>
Fiona Harvey	<i>Education &amp; Youth Ensembles Consultant</i>

### **Association of British Orchestras**

Registered in England no. 1806863 A company limited by guarantee

### **ABO Trust**

Registered as a charity no. 1003852

### **Registered Office**

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