

Strategic plan for the Association of British Orchestras

2019-2022

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Introduction

This Strategic Plan follows a series of strategic plans published by the ABO over the past three decades, with the most recent dated 2016-19. The Strategic Plan has been developed following a board awayday in September 2018.

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 2018. 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 networking and training 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. Key challenges, however, that have emerged in the past year are Brexit and recent developments relating to Noise at Work Regulations. This will stretch the ABO's capacity to seek resolutions to these major challenges while also delivering the full range of activity within its objectives of Connecting, Championing and Developing.

Underlying this are concerns that public funding for orchestras and the wider classical music sector is under ever increasing scrutiny, particularly in relation to relevance to today's society, and by extension diversity and inclusion. The ABO needs to help its members understand the challenges ahead and build strategies for change.

The ABO remains in good financial shape, with a healthy level of reserves in relation to its turnover. It is however almost wholly dependent on subscriptions and income from events. A financial loss in 2016/17, its first in many years, was a wake-up call for ensuring its sources of income match the expenditure incurred delivering the level of activity expected by its members.

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. It sets some expectations for both the board and its members, especially in terms of the ABO's future capacity and activity, along with its sources of finance, 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.



Gavin Reid
Chair
1 April 2019

Background

The ABO was founded in March 1948 as the Orchestral Employers Association, with the encouragement of the Arts Council of Great Britain, as the single voice for professional orchestras and to negotiate with the Musicians Union and other bodies on behalf of its membership. Re-branded the Association of British Orchestras in 1973, in 1982 the ABO became a company limited by guarantee, at which point it began to engage professional staff and extend its services for members. The ABO's negotiating function was reduced considerably in 1989, when the contract orchestras ceased to negotiate collectively.

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 plus interns. This funding ceased in 2011.

A new Director, Mark Pemberton, was appointed in July 2007 and the programme of activity has continued along similar lines. Following a decade of support from our landlords Shaftesbury plc, the ABO moved into SOLT and UK Theatre's premises in Covent Garden in October 2011, where it has access to a suite of meeting rooms and 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 films 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 Communications to carry out statistical surveys of ABO members in 2013 and 2016.

- In 2014/15 the ABO worked with DHA Communications on its #orchestraseverywhere campaign online and 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 the creation of Orchestra Tax Relief.
- An All Party Parliamentary Classical Music Group was launched in 2009, with the ABO as secretariat, and has held frequent meetings in parliament with guest speakers.
- The Healthy Orchestra Charter was launched in 2006, with financial support from the Musicians Benevolent Fund, and ceased in 2012. The ABO continues to monitor our members' commitment to the health and well-being of their musicians, with a renewed and critical emphasis on Noise at Work following the judgement in *Goldscheider vs Royal Opera House*.
- 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 annual conferences in Brazil from 2014 to 2016 to help Brazilian orchestra managers re-envision their role as leaders and managers.
- In February 2012 a consortium led by the ABO was awarded £1.1 million to develop the Family Arts Campaign. The ABO was the accountable body until April 2016, and remains an active member of the Campaign.
- In 2015 the ABO launched Find Your Way, a professional development programme that offers tailored coaching, mentoring and residential training for emerging leaders.
- 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 Foundation's Resonate programme in 2016, which provides funding for ABO members wishing to give repeat performances of new works.
- Following a donation to the ABO Trust, the ABO launched its Sirens programme in 2017, providing grants to orchestras wishing to programme works by historical women composers.
- The ABO continues its much-celebrated music education programme. The Early Years Cluster Programme ran from 2006 to 2009, funded by Youth Music, 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 celebrated its 70th anniversary with a Parliamentary Reception in the House of Commons in March 2018, followed by a reception in the Scottish Parliament in December 2018.

VISION, MISSION AND OBJECTIVES

Our vision is of a society which values its orchestras and their musicians as being core to contemporary culture.

The ABO's mission is to enable and support an innovative, collaborative and sustainable orchestral sector, and 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 2019-2022 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** 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 legislation and government policies both in the UK and internationally, 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 and nurturing emerging leaders.

Our **priorities** and **outcomes** for 2019-22 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 mitigating the risk of a negative impact on ABO members after the UK leaves the EU.
- 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 working with key stakeholders including Conservatoires UK to mitigate the risk that recent developments in relation to Noise at Work Regulations will impact negatively on our members.

- 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.
- Maintain 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 and the youth ensemble sector, influence national policies on music education and arts in health, including supporting government agendas on mental health and loneliness, and encourage and pursue funding opportunities for collaborative education projects.

These will be achieved through the following **activities and targets** .

Connecting

Activity	Implementation	Key Performance Indicators
Conference	<ul style="list-style-type: none"> Conference retains its status as UK's leading classical music conference 	<ul style="list-style-type: none"> Conference takes place and secures income and delegate numbers in line with or above budget Quality of content and speakers, media interest and international attendance are maintained
Networking	<ul style="list-style-type: none"> Offer SMMs across range of manager roles Provide information for education managers and youth ensembles Hold annual CEOs Forum/AGM 	<ul style="list-style-type: none"> SMMS to take place during Spring and Autumn with high quality content and speakers Produce regular education and youth ensemble bulletins CEOs Forum held each November
Wider industry/memberships	<ul style="list-style-type: none"> Connect to key national and international industry bodies via membership eg. PEARLE Connect to wider music/arts bodies nationally and internationally including Conservatoires UK Connect to key education bodies 	<ul style="list-style-type: none"> Pay annual membership fees where appropriate Attend national and international meetings and events and disseminate information to members Liaise with members of CUK on issues of mutual interest Education Consultant attends key education seminars and conferences and disseminates information to members
Music education	<ul style="list-style-type: none"> Respond to Government and other policy maker consultations and research 	<ul style="list-style-type: none"> Education managers consulted and coordinated responses submitted
Youth ensembles	<ul style="list-style-type: none"> Create opportunities for youth ensemble members to connect with other ABO members each other 	<ul style="list-style-type: none"> Dedicated sessions scheduled at annual conference and other networking opportunities
Website	<ul style="list-style-type: none"> Commission and launch new website as a resource for members and the public 	<ul style="list-style-type: none"> New website launched Website to remain fresh, relevant and easy to use for members
Social Media	<ul style="list-style-type: none"> Use social media tools to connect members and the public to the work of the ABO 	<ul style="list-style-type: none"> Increase sign-up to social media feeds with target of 10,000 Twitter followers by March 2022
Update	<ul style="list-style-type: none"> Monthly email update to members 	<ul style="list-style-type: none"> Update circulated at beginning of the month
Concerts/Events	<ul style="list-style-type: none"> Staff to attend concerts and other member events, ensuring representation outside London 	<ul style="list-style-type: none"> Include concerts/events attended in Update

Championing

Activity	Implementation	Key Performance Indicators
Communications/Public Affairs	<ul style="list-style-type: none"> • Attend meetings with key decision makers and represent the interests of members at national and international levels, including music education bodies • Liaise with government departments on Brexit • Serve as secretariat to All Party Parliamentary Classical Music Group 	<ul style="list-style-type: none"> • Publish list of conferences, events and meetings attended in Update • Distribute regular stakeholders' newsletter • Arrange meetings of APPG
Legislation	<ul style="list-style-type: none"> • Monitor and influence legislation at national and European level 	<ul style="list-style-type: none"> • Respond to government consultations and attend meetings with government departments • Attend PEARLE conferences
MU	<ul style="list-style-type: none"> • Negotiate ABO/MU Casual Concerts/Freelance Musicians agreement • Liaise with MU on issues of concern to members and develop joint agendas 	<ul style="list-style-type: none"> • Conclude negotiations by 1 April each year or as soon as possible thereafter • Ensure up to date agreements and supplementary guidance are available on the website • Joint agendas developed to mutual benefit
Key Facts	<ul style="list-style-type: none"> • Collect statistical data from Full members in Summer 2019 	<ul style="list-style-type: none"> • Board members to champion to respective sector of membership • Publication of sector statistics in January 2020
Youth ensembles	<ul style="list-style-type: none"> • Communicate the value of youth ensembles to national and local stakeholders 	<ul style="list-style-type: none"> • Regular meetings with key stakeholders • Youth ensembles included in stakeholders newsletter
Media	<ul style="list-style-type: none"> • Monitor relevant publications and websites • Provide press statements • Issue press releases • Create 'presskit' 	<ul style="list-style-type: none"> • Monitor and disseminate via Update and bulletins • Respond to press enquiries • Issue press releases as required • Publish presskit
Awards	<ul style="list-style-type: none"> • Present ABO Award • Present Salomon Award in partnership with RPS • Present ABO/Rhinegold Awards 	<ul style="list-style-type: none"> • Awards presented

Developing

Activity	Implementation	Key Performance Indicators
Professional Development	<ul style="list-style-type: none"> • Offer one day management courses • Provide access to UK Theatre courses • Provide networking opportunities for chairs and trustees 	<ul style="list-style-type: none"> • Courses successfully delivered • Other courses developed in response to member need • Chairs networking events take place
Seminars	<ul style="list-style-type: none"> • Offer seminars and workshops on relevant topics as the need arises 	<ul style="list-style-type: none"> • Seminars delivered successfully
Leadership	<ul style="list-style-type: none"> • Maintain programme for emerging leaders 	<ul style="list-style-type: none"> • Deliver Find Your Way programme
Diversity and Inclusion	<ul style="list-style-type: none"> • Maintain diversity and inclusion as key topic at conference and other events • Publish Diversity Statement • Work with ACE on research and action plan 	<ul style="list-style-type: none"> • Conference sessions and other events delivered • Statement published on website • ACE research published and action plan launched at Conference 2020
Healthy Orchestra/Noise at Work	<ul style="list-style-type: none"> • Maintain Healthy Orchestra programme • Develop specific initiatives in collaboration with key stakeholders • Monitor impact of Noise at Work judgement on the sector and work with Weightmans on Legal Intervention 	<ul style="list-style-type: none"> • Healthy Orchestra programme continued through development of other initiatives • Noise at Work training and information provided to members • Legal Intervention launched prior to court hearing in spring 2019
Factsheets and Advice	<ul style="list-style-type: none"> • Supply factsheets for members • Develop access to specialist advisers, subject to regular review 	<ul style="list-style-type: none"> • Factsheets made available on ABO website • Specialist advisers publicised on website
Careers	<ul style="list-style-type: none"> • Provide careers information and advice 	<ul style="list-style-type: none"> • Provide careers information on ABO website • Give careers lectures at HE institutions
Resonate	<ul style="list-style-type: none"> • Maintain database of orchestral repertoire commissioned since 1990 • Promote PRSF funding scheme for repeat performances 	<ul style="list-style-type: none"> • Work with PRSF on database updates and funding scheme
Sirens	<ul style="list-style-type: none"> • Promote funding scheme to members 	<ul style="list-style-type: none"> • Grants to members issued by ABO Trust
Family Arts Campaign	<ul style="list-style-type: none"> • Maintain membership of the Family Arts Campaign consortium 	<ul style="list-style-type: none"> • Network and training opportunities provided to members • Family friendly activity and audiences developed across the membership

Governance

The ABO's Articles of Association 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.

The current chair will retire in November 2020 and the board will work on a succession plan.

Membership

The past decade has seen growth in the number of members. Membership as at 31 March 2019 stood at 192, comprising 66 Full Members, 23 Associate Members, 24 Youth Ensembles, 31 Affiliate Members, 29 Corporate Members, 7 Sole Trader members and 12 Honorary Members.

A review of current subscription categories, with the aim of achieving simplification and growing the membership, will take place prior to presentation of revisions to the Articles of Association at the AGM in November 2019.

Staffing

The board will ensure that there is sufficient staffing resource to deliver the activity outlined in the Strategic Plan.

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 strategies
- Public affairs and representation to the wider industry and key stakeholders
- Conference and events programme and curation
- ABO/MU Agreement and joint ABO/MU initiatives
- Company Secretary and Governance
- Trustee and secretariat of ABO Trust

Membership & Operations Manager

- Financial and operations management
- Membership applications and subscription renewals
- Management of annual conference, specialist managers meetings, training courses and seminars
- Management of Healthy Orchestra programme
- Managing provision of advice to members
- Office management including IT and database
- Line management of Office & Events Administrator

Office & Events Administrator

- Assisting the Membership & Operations Manager in delivery of annual conference, specialist managers meetings, training courses and seminars

- Assisting with membership applications and subscription renewals
- Assisting with office management including IT and database
- Providing PA and administrative support to the Director and other staff

Education/Youth Ensembles Consultant

- Pursuing opportunities for funding for collaborative education projects
- Liaising with ACE, Creative Scotland, ACW and key music education bodies
- Tracking outcomes of National Plan for Music Education and other government reviews
- Responding to relevant government consultations
- Supporting the Education Managers group and follow-up actions, including monthly bulletins
- Developing music education events and seminars
- Researching music education delivery across the membership
- Developing and supporting the Youth Ensemble membership including regular bulletins
- Managing and exploring funding opportunities for Find Your Way programme
- Management of Sirens programme

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

Financial projections and resources

The ABO's finances are in a satisfactory position. Reserves as at 31 March 2018 were £190,173, an increase of 170% since 2007.

The board has agreed a reserves policy that aims for a minimum of six months' expenditure to enable the ABO to cover its liabilities in the event of dissolution and continue to provide a service to members during that period. Any additional reserves may be used for legal advice, campaigns, research or 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 into a single rental. The lease was renewed in October 2016 for a further five years, and negotiations on renewal for a further five years will commence in early 2021. Exceptional expenditure will need to be budgeted for in 2021/22 for possible relocation.

Financial projections for 2019-22 take account of the activity outlined in the Strategic Plan. Exceptional expenditure has been budgeted in 2019/20 for the triannual statistical survey of members and a new website.

ABO BOARD 2019/20

Gavin Reid Chair	Chief Executive	Scottish Chamber Orchestra
Catherine Arlidge MBE	Sub-Principal Second Violin/ Artistic & Education Director	City of Birmingham Symphony Orchestra/ National Children's Orchestras of GB
Peter Bellingham	Chief Executive	Sinfonia Cymru
Phil Boughton	Director of Orchestra & Chorus	Opera North
Ginny Macbeth	Director	Macbeth Media Relations
Jenny Jamison	Chief Executive	Scottish Ensemble
Linda Merrick	Principal	Royal Northern College of Music
Louise Mitchell	Chief Executive	Bristol Music Trust
Helen Sprott	Managing Director	Philharmonia Orchestra
John Summers	Chief Executive	Hallé Concerts Society
Matthew Swann	Chief Executive	City of London Sinfonia
Simon Webb	General Manager	BBC Philharmonic Orchestra

ABO STAFF

Mark Pemberton	<i>Director</i>
Jenny Lomas	<i>Membership & Operations Manager</i>
Emma Nevell	<i>Office & Events Administrator</i>
Fiona Harvey	<i>Education & Youth Ensembles Consultant</i>

Association of British Orchestras

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ABO Trust

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