



Chetham's
School of Music

love to live to play



Chetham's A Place where Exceptional is the Norm

A Case Study on the New School Appeal by Lady Fender

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Case Study

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Imagine a world where exceptional is the norm, where musical talent, not academic qualifications or parental wealth, is the key to a life enhancing journey. Imagine a school where every student is given the ability to delight music lovers in the greatest concert halls of the world.

Imagine a board of trustees who have the courage to make a heroic decision to choose £36 million as the target of their first major fundraising appeal and four years later are able to watch their new buildings rise.

Welcome to Chetham's School of Music



Background



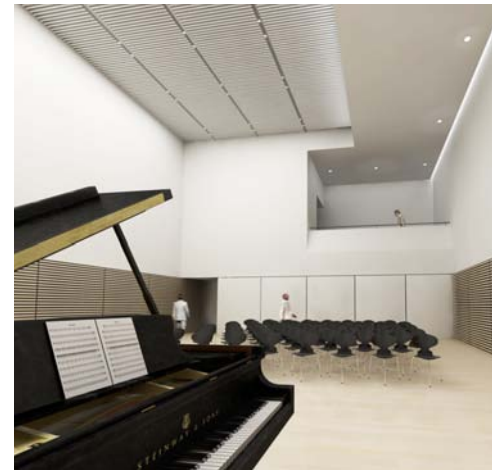
Chetham's, the UK's premier music school, nestles into the site of a medieval hospice in the cultural and business heart of Manchester. Some of the world's finest young musicians live and work in 600 year old buildings - wonderful to the eye but damp, with crumbling brickwork and never intended to enhance individual or ensemble musical performance. Then, four years ago, land adjacent to the School became available and the Feoffees of Chetham's, the name for trustees inherited from the original hospice foundation, were faced with allowing the School to remain in crumbling buildings built in another age for another purpose, or purchasing the land to build purpose designed facilities to complement its world class quality teaching. Having grown dramatically since 1969 when a boy's grammar school was turned into a pioneering, fully co-educational boarding specialist music school, there was a need to step back, and consider with care, future development.

Chetham's really is a place where exceptional is the norm - talented young students live and work in an atmosphere of creativity, achievement, challenge and warmth - an atmosphere created by the staff and the proximity of world class performers attracted by the Hallé orchestra, the Bridgewater Hall and the Cathedral. It is likely that music will play an important part in the future lives of all the students but such is the breadth and quality of the academic curriculum that 10% of students choose to follow a range of other degree courses such as medicine, law, languages, engineering, arts, humanities and other sciences. Chetham's is perhaps unique

in providing National Curriculum plus for all its pupils. The School also has a number of children with special needs and a strong compensatory education department where students are enabled to give of their best and attain highly in examinations and in performance.

The School site itself houses one of the most important medieval library buildings in Europe, hidden by a decrepit Victorian hotel, and is strategic to the development of the northern gateway to central Manchester. The Feoffees are committed but busy people, with a strong influence base in the North West and a commitment to the growth of civic, business and artistic achievement in the area.

To purchase the land, build a main school building and then a 350-seat concert hall would cost £36 million. This would give students, staff and audiences the facilities they so deserved and allow the medieval splendour of the original buildings to be exposed for public admiration. The School had no experience of major fundraising but the Feoffees made a historic and heroic decision that Chetham's should have the facilities its achievements and promise deserved.



The Steering Group



The Feoffees set up a fundraising committee. This committee was small but high powered;

- Paul Lee, Chairman of the Feoffees of Chetham's, Senior Partner of Addleshaw Goddard, one of the country's leading law firms, Chairman of the Horserace Betting Levy Board and Chairman of The Royal Exchange Theatre
- Michael Oglesby, founder Chairman of the Bruntwood Group and an entrepreneur who has helped re-shape much of central Manchester as well as being a benefactor of the city's cultural activities
- Dame Sandra Burslem, Chairman of the School Governors at Chetham's, a past Vice Chancellor of Manchester Metropolitan University, whose many other posts include being Chair of the Education Honours Committee and the first Independent Chair of the British Council's Education UK Partnership
- Richard Bailey, Managing Director of Rothschild Investment Banking
- Andrew Johnson, Partner at Beaumont Capital, Chairman at Techlightenment
- Claire Hickman, Head of School for ten years, who introduced a new emphasis on improved academic education and the development of the whole child as well as the precocious talent
- Stephen Threlfall, Director of Music at Chetham's
- Sarah Newman, Bursar of the School and of the Foundation

The Consultant

The Feoffees began looking for a consultant who would help them develop and deliver the fundraising target. They chose Patrick Boggon of Tarnside because, according to Dame Sandra, they felt that this consultancy offered a clear, professional approach that included working closely with trustees and staff.

Patrick began by holding a seminar for trustees and staff to establish and share the goals of the appeal, the methodology to be used and introduce them to the Tarnside Curve of Involvement© (illustrated on p.14). This curve shows how fundraising becomes more effective when the asker is able to establish direct links with the donor, often through a third party introduction. The involvement of the donor and asker is a journey in which time, energy and empathy have to be invested before the best result is achieved. It is the investment in building relationships which is vital. So much money and effort can be wasted, for instance, on cold calls and letters.



The Challenges Identified

- The economic climate during the past decade has made fundraising difficult
- Chetham's has a compelling story but it is little known outside the classical music world
- Key players were heavily involved in other activities leaving little time for the appeal
- The North West Development Agency had promised funds but with tight time scales imposed

The Strategy



The Strategy

1. Developing a Clarity of Vision

With so many activities and partnerships evolving for the site, it was important for the Feoffees, led by Tarnside, to agree on the parameters for the appeal. After detailed discussion it was decided that the school building would take the lead because it was the most costly and the most appealing to potential funders. The Vision centred on Chetham's ability to rejuvenate itself, and its image, and 'Change the World with Music'. A Case for Support was then developed to highlight the benefits to each group of actual or potential beneficiaries; the students, performers, audiences and the nation. Chetham's was shown to be open for all, regardless of background or personal circumstances, and to underpin the musical heritage of the nation.

Why is Chetham's special?

- Places are awarded purely on musical ability and potential. Young people with raw talent are turned into the leading musicians of tomorrow
- Entry is open to all, regardless of background or personal circumstances. 90% of UK students receive bursary support and 15% come from households with a joint income of under £10,000
- Chetham's students underpin the musical heritage of the nation. Alumni form the backbone of the UK's major musical institutions and include many international soloists, conductors and composers. Three of the last five winners of the BBC Young Musician of the Year competition have come from Chetham's; students such as the acclaimed



conductor Paul Mann (1981-1983); trombonist Peter Moore (2004-present), who at the age of 12 became the youngest ever winner of BBC Young Musician of the Year in 2008; Jennifer Pike (1998-2006), winner of the BBC Young Musician of the Year in 2002 and the first classical musician to win the Times Breakthrough Artist Award at the South Bank Show Awards.

How will the project benefit students?

- More purpose built space in which to study, practice and rehearse
- Cutting edge music technology and recording facilities
- Superb performance venues

How will the project benefit students and audiences alike?

- Two concerts every day - open to all, free of charge
- A 350-seat Concert Hall, with a stage large enough for a full symphony orchestra and chorus
- A 100-seat venue for smaller ensembles

What will the nation gain from the new development?

Thinkers through the generations have articulated the importance of music in civilization - 'Without music, life would be a mistake', Nietzsche, or 'A nation creates music - the composer only arranges it', Glinka. Leading figures in the contemporary musical world gave their independent endorsement of the importance of Chetham's - 'Chetham's School of Music is the UK's leading music school and a cultural gem that the whole country should be proud of', said Richard Morrison of The Times. 'Without doubt, Chetham's makes the UK's cultural life a richer place. The training and preparation for the profession are second to none, and so many places in our major orchestras are taken by these wonderfully gifted people', Sir Mark Elder CBE, Music Director, The Hallé. The specific advantages identified were to:

- Secure the training of the most talented musicians who go on to form the backbone of our national orchestras and other musical institutions
- Benefits from Chetham's outreach programme for music teachers and students of all standards
- Enjoy a dedicated music therapy centre and an Early Years resource centre





2. Identifying Funding Streams

Tarnside's Feasibility Review set out three strands of potential income for Chetham's:

- Regionally - in and around Manchester - where the spur would be civic pride in Chetham's
- Nationally - where the spur would be Chetham's premier standing in the music world
- Statutory - for both of the above reasons and the development of the city itself

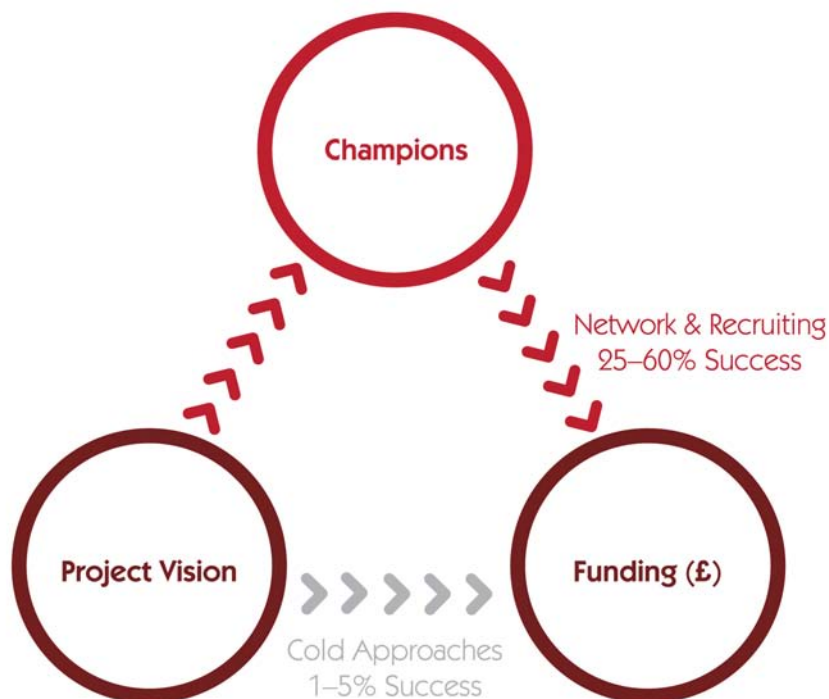
N.B. It was essential that all three strands were followed as analysis of other appeals regionally in Manchester and nationally for other music schools suggested that both these markets had a ceiling and therefore further statutory support would be vital.

3. Engagement of Appeal Champions

The feasibility review highlighted that the engagement of appeal champions would be critical to the success of the appeal. The purpose of the champions is to access and influence decision makers within prospective funders to ensure that the appeal would get a fair hearing, would receive funding and that the funding would be at the top end of each funder's giving scale. This is demonstrated through Tarnside's 'Champions Triangle©'.

Tarnside's Champions Triangle©

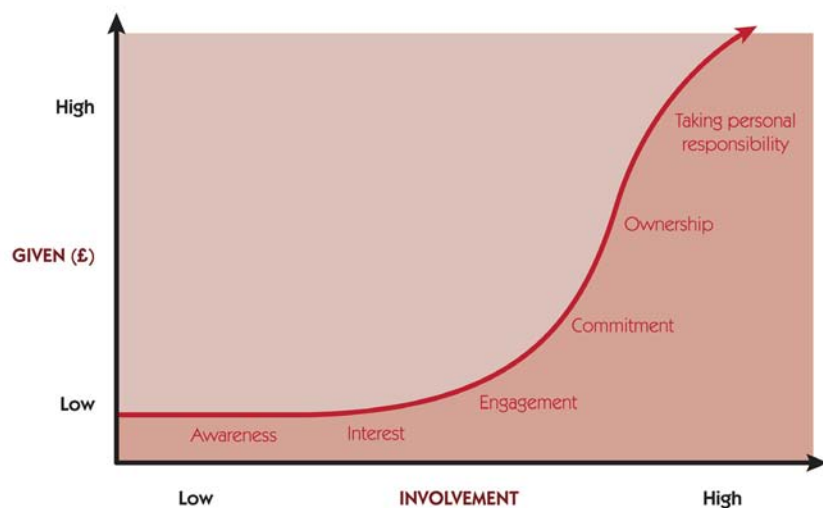
Illustrating the potential increased success rates of championed approaches over cold approaches





The importance of developing deeper and more involving relationships over time is further demonstrated through Tarnside's proven model, the Curve of Involvement©, which shows that this engagement and a personal involvement has a strong correlation to an increase in the size of donation obtained.

Tarnside's Curve of Involvement©



Champions of Success



Champions of Success



Key Successes

- Clarification of appeal Vision (and its crystallisation in the Case for Support) and alignment of appeal stakeholders behind it
- Securing the personal financial support of Feoffees and senior staff to the appeal - creating impressive moral high ground for other funders
- Working closely with Claire Hickman, the Head, to help her to become more externally focused. Claire's efforts were pivotal in identifying, nurturing and bringing to fruition networks and contacts to help unlock fundraising opportunities
- The engagement of the royal patron, Prince Edward, particularly in the hosting of a dinner at Buckingham Palace. This helped to introduce the appeal to many influential people and open the door to building networks amongst national funding organisations
- Initiating a series of events to expand the network of contacts open to the School. This was especially important in London where Chetham's had a relatively modest network of contacts
- The engagement of the Executive Director of Sainsbury's Family Trusts, as an appeal champion

Key Successes Continued

- Encouraging the music staff to become fully engaged in the campaign and help identify potential supporters/advocates/champions in the classical music world
- Helping Claire and Bill King, her Development Manager, encourage a culture of fundraising within Chetham's and an understanding of fundraising's importance to the School's future success. This has led to an increase in sustainable fundraising from legacies, Alumni, friends and family



Successes of the Champions

- Ron Haylock, a Feoffee, persuaded a co-trustee of the Gabrieli Consort to attend Chetham's 40th anniversary concert. He then introduced a senior executive of the Sainsbury's Family Trusts who later visited the School with a trustee. A donation of £1 million was committed
- Dame Sandra was invited by a longstanding friend, now with a significant record of fundraising in the charitable arts sector, to a concert in Liverpool, after which they visited the School, talked to the Head. This led to several useful introductions including the Foyle Foundation which made a £250,000 donation
- The godmother of a pupil emerged as the key link with the Garfield Weston Foundation. A donation of £250,000 was committed

Feedback from the School



Feedback from the School

A £30 million contract has been signed and building is underway. Over a two year period the Chetham's appeal raised in excess of £26 million thanks to a well planned campaign and the enthusiasm of Feoffees, staff and students. Yet the legacy of the campaign is more than money.

Dame Sandra Burslem greatly values the outcomes from Patrick Boggon's appointment as the fundraising consultant for Chetham's. She, the Head and the other governors have learned the importance and relevance of the Curve of Involvement®, the development of champions and the creation of small working groups. She recognised that Chetham's had not suffered the normal 'wobble' when money and effort flows out before funds begin to come in because substantial public sector donations were received at the beginning of the campaign. She felt that it had taken two years to build up trust and momentum, particularly as any group has people who find it difficult to engage and the appetite for risk differs. Importantly, she felt that Claire and her staff had developed their fundraising techniques and confidence through Patrick's human skills and professionalism.

Claire Hickman and Bill King, her Development Manager, believe that Patrick has helped them to reflect on the School, its achievements and its reputation. Both believed that in addition to putting in place a successful fundraising strategy, he had helped them improve overall performance and made a significant contribution to their personal development.



Michael Oglesby was realistic about the challenges faced by a fundraiser in bringing together a group of busy independent trustees, with pressured lives and different backgrounds. He felt that Tarnside had done well in professionalising what the School needed to do - the Curve of Involvement© had made sense, but Chetham's needed more strength at the middle of the organisation to help the champions. Indeed, could the consultant make appointments with potential donors? Most of the trustees knew those with influence in the North West but help was needed in London. Above all, an organisation such as Chetham's needed to be realistic about recognising that fundraising was a core activity and needed to be funded at the right level.

Chairman Paul Lee reflected the views of his team and stressed the importance of scoping at the beginning of a project.

"Tarnside provided us with a professional fundraising service and template which guided us in introducing potential donors and supporters to the exceptional qualities of the staff and students of Chetham's School."

Paul Lee, Chairman of the Feoffees of Chetham's School

Lessons to be Learned

1. **Do your homework.** Chetham's were not only appealing for a new building, they were repositioning themselves on the world stage. Analysis was needed to understand the competition and the likely needs of future students. As the site is vital in the successful regeneration of the area, an understanding and involvement with partners was essential. Chetham's were fortunate to have Michael Oglesby, a key player in the regeneration team, on board.
2. **Create, inform and nurture your champions and potential donors - a key lesson from Patrick Boggon.** The Chairman and Board led the way in using their contacts to bring support to the appeal but Chetham's made sure that everyone, governors, staff and students, shared the aims of the appeal. It was a student who involved her godmother in a successful approach to a leading charity and a member of staff who had great success through approaching a fellow musician. Personal connections are essential, cold approaches to potential donors simply do not work.
3. **Clarify your vision at the beginning.** It may take time to unify a group of successful people but they have to agree the approach and methodology as well as the target.
4. **Analyse the unique strengths and weaknesses of your case.** For Chetham's the ability to invite potential benefactors to concerts where they could appreciate the talent and spirit of the students was a priceless selling tool. Perhaps the main weakness was the lack of exposure in London. Having Prince Edward as an active patron, hosting a dinner at Buckingham Palace where the School was able to present itself to the influential was ideal. More and more people are realising the importance of providing a cultural bridge between London and the regions.





5. **The School would benefit tremendously from having more London based champions with access to funders.** This would support approaches to both statutory and private sources of funding.
6. **Take care to husband the use of precious resources.** Some fundraising events catch the imagination but achieve little in enhanced cash flow or reputation.
7. **The music staff proved to be an untapped goldmine of contacts.**
8. **Chetham's fundraising for the new building was the first major fundraising campaign for the School and the beginning of the development of an important site at the core of the Manchester cultural centre.** It was important that the 'scope' of the campaign was defined at the beginning and refreshed through regular conversations between consultant and Feoffeees. Most consultancy work has a natural time span. The extra activity can put additional burdens on the internal staff and, when the consultancy finishes, additional staff are often required to build on the contacts and activities established. In theory these developments can be foreseen. In practice they evolve at different rates and need sensitive handling.

Could there be improvements?

Undoubtedly. Each client/consultant relationship is unique. Some busy people would find it easier for the consultant to arrange meetings with potential sponsors. However, there are practical and ethical issues to consider. The consultant knows people who are influential in grant making but would lose effectiveness if attempting to make direct appeals on behalf of every client. The real success of the Curve of Involvement© strategy is that it involves the organisation's people in making, developing and maintaining contacts long after the consultant has moved on.



Conclusion



The partnership of Chetham's and Tarnside was a partnership which shows how professional fundraisers can play a vital role in the intellectual and physical growth of an organisation and its environ. Chetham's is well on its way to completing the building appeal and, helped by the self analysis and development work associated with mounting the project, becoming a leading international force in the training of precious musical talent. They are helping music to change the world.

This case study was researched and written by Lady Fender.

Lady Fender is Vice Chairman of Governors of Staffordshire University. Her professional career was as Corporate Communications Director of the Royal Doulton Group and she has subsequently had many public appointments including Magistrate, Tax Commissioner and a Council member of Lichfield Cathedral. Lady Fender worked closely with Tarnside Consulting whilst they were helping Lichfield Cathedral and subsequently agreed to write this Case Study.



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Chetham's School of Music
Long Millgate
Manchester M3 1SB
T: 0161 834 9644
F: 0161 839 3609
www.chethams.com

Chetham's is a Registered Charity, No 526702C



Tarnside Consulting
Scar View
Crosthwaite
Nr Kendal
Cumbria LA8 8BU
T. 015395 68953
info@tarnside.co.uk
www.tarnside.co.uk