

A stack of four books with different colored covers (orange, blue, red, blue) and two dark brown pencils with silver erasers and sharpened tips. The pencils are positioned vertically on the right side of the stack, casting shadows on the pages. The background is a blurred green wall.

**Transforming  
young lives:**

Fundraising  
for bursaries

*By John Cloughton*

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# **Transforming young lives: Fundraising for bursaries**

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## **About the author**

John Cloughton was educated under the Direct Grant scheme at Bradford Grammar School and King Edward's School, Birmingham and then at Merton College, Oxford. He taught classics at Eton College for 17 years, was headmaster of Solihull School from 2001 to 2005 and chief master of King Edward's School, Birmingham from 2006 to 2016. During that decade the school raised nearly £20m for Assisted Places and capital projects. In 2016, he was chosen as Tatler Head of the Year and won the TES Independent Schools Lifetime Achievement Award. He now governs four schools and is senior counsel for Graham-Pelton Consulting.

## Foreword

Fundraising or development in schools is a relatively new, yet rapidly emerging, practice in the UK. The Institute of Development Professionals in Education (IDPE) was established in 1999 by some of the very first fundraisers in UK schools. Its charitable purpose is to enable schools to fundraise effectively so that our young people benefit from the best educational experience.

IDPE has over 20 years of expertise and resources in development and is the leading professional membership organisation in alumni relations and fundraising for schools. IDPE supports over 400 schools with an established development programme including those in the process of setting one up.

The IDPE and Graham-Pelton Schools' Fundraising and Engagement Benchmarking Report is the largest survey of fundraising in the education sector and underpins the case studies in this publication with granular data to inform best practice in fundraising and provide unique intelligence for school leaders, so that as a sector we can raise more for bursaries.

**Jo Beckett**

IDPE chief executive  
[idpe.org.uk](http://idpe.org.uk)

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# Introduction

Bursaries are fee reductions for parents who cannot afford the full fee. Some schools, such as Christ's Hospital, have foundations that have always paid for huge numbers of bursaries. Some schools, like Eton, were established for a small number of poor scholars; over time the number of such bursary boys has grown, especially in recent years. Some schools have few bursaries because they have no foundation, they make little money and have been unable to find wealthy alumni who might help. This tends to be true of smaller schools.

Recognising that it was beyond the capacity of most independent schools to fund many bursaries, but that children from low-income homes could benefit greatly from private schools, previous governments have funded bursaries at times in the past. In the twentieth century this happened in various ways but the most successful was the Direct Grant, which ran from 1945 to 1976 until it was abolished by a Labour government. At schools like Manchester Grammar, most of the pupils had their fees paid by the grant. It was a ladder to social mobility for tens of thousands of young people. Margaret Thatcher introduced an Assisted Places scheme in 1979 but this was scrapped under the Blair administration 20 years later. No subsequent governments have chosen to fund bursaries.

Between 2000 and 2010 independent schools felt obliged to keep up with state school teacher pay and pension costs, which resulted in noticeable fee rises. This created another issue because the higher the fee, the greater the cost of providing bursaries.

Higher fees also meant there were middle-income parents who would not have been able to afford the cost of their child's education without a small bursary. There were independent schools that understandably chose to, and continue to, offer bursaries to middle-income parents to ensure they have a socio-economic mix that better reflects society.

All independent school leaders want to take pupils from a wide range of backgrounds. In the experience of most, this leads to a happier and more interesting school. There has, particularly in recent years, been political pressure to take more pupils on bursaries. But the problem is generating the significant sums required to fund this provision. In December 2019 the Conservative Party won the general election with a big majority, but fee-charging schools still face a battle to fund access for children from low-income families.

Many schools fund bursaries out of fee income, so the wealthier parents are in effect paying three times - they pay for their own child, then they pay through their school fees for a bursary pupil, and then through income tax they pay for someone else's child to go to a state school. Schools want to increase the number of large bursaries but for many that can only be paid for by pushing up the school fee. The higher the fee, the more expensive bursaries become and the smaller the number who can afford the full fee.

That is why we need this book. In the absence of government backing for bursaries, schools need to be clear about fundraising – the opportunities available to them, what approach is best suited to their individual circumstances and ways of working they may be able to replicate.

The conversations documented in this publication are mainly about larger schools. However, the methods used by these schools to raise money are relevant, at a smaller scale, to all independent schools.

**Barnaby Lenon**

Chairman of the Independent Schools Council

# Preface

For 15 out of the first 16 years of this century, I was the head of two independent schools – one at a time, of course. From 2001 to 2005 I was headmaster of Solihull School and never once in four years did I ever hold a conversation or take any action about bursaries or accessibility. From 2006 to 2016 I was chief master of King Edward's School, Birmingham, where I had been as a boy on a free place. In those 10 years, fundraising for bursaries was the thing that mattered to me most and consumed much of my thoughts and time. Progress in that area was the thing of which I was most proud when I retired in July 2016. The complete dislocation between my priorities in two, not very different, independent schools, seven miles apart, now strikes me as more than somewhat odd, but it may reflect the very different attitudes schools, and heads and governors, can have about their purpose, strategy and culture.

Even since I have retired in search, like Cicero, of *otium cum dignitate* and, unlike Cicero, in the inner suburbs of multiracial Birmingham, I have remained interested in this subject. This book, commissioned by the Independent Schools Council and IDPE, and supported by Graham-Pelton Consulting and the ISBA, is a product of that interest. It is not a scholarly, global thesis on the state of bursaries and bursary funding in the independent sector. Nor is it just a handy guide to how fundraising should be done, although there is much to be learnt on the way, I hope. It is more serendipitous and dialogic than that. It is made out of conversations I have had with a wide range of people at a number of independent schools and some overarching institutions, such as Royal SpringBoard and the Girls' Day School Trust, about their experiences in this area. Some of those conversations are with schools that are the leaders in the field; others with schools that are in the process of becoming. And some of these conversations are about how to raise money, some about how to spend it, some about how to find bursary applicants, some about how to look after them and one or two about how to measure the impact of a bursary scheme.

My hope is that these conversations, and the introductory and valedictory chapters, will give those inside independent schools – governors, heads, bursars, development professionals – something to think about and to think with. I also hope that these detailed narratives about schools will inform the wider educational world about the history, nature and purpose of some of our schools and show how much thought, time and effort is being put into this critical area of endeavour.

However, this preface must end with something of an apology. The book is personal, to an extent, limited and far from exhaustive. Its content was dependent on the contacts that I already had and the willingness of people to give up their time. It does tend to concentrate on a number of high-profile secondary schools and individuals and certain parts of the sector have less representation than others. And I suspect there will be a number of readers of this book who will be cross that they have not been invited to join in. I apologise for that but perhaps it means there will need to be a sequel. Perhaps.

In the meantime, I would like to thank for their time, support, wisdom and patience all of the people who have contributed to this book. The opinions herein expressed aren't theirs. They are mine – I think.

**John Cloughton**



## Chapter 1:

# Setting the scene

In this world of fake news and high emotion, let's start with some of Mr Thomas Gradgrind's facts and where better to start than with the most recent ISC census published in April 2019? That census tells us that there are 1,364 schools in the Independent Schools Council (ISC) and there are 536,109 pupils in those schools.

Of those 536,109 pupils, 152,799 (28.5%) receive some kind of financial support from their school at a cost of £864m. That amount is up by 5.6% from 2017/2018. Of the 152,799 pupils who received some kind of financial support, 44,792 (8.4% of all pupils) received means-tested support, whether bursary or scholarship, at a cost of £422m, and 6,169 (1.15% of all pupils) received 100% bursaries.

So, why do accessibility and bursaries matter? And why do they matter particularly now? Some of the reasons are external and political. Whether they have been called public schools or private schools or independent schools, fee-charging schools have been a matter of public debate for over 150 years. There were two commissions of inquiry into the topic by Lord Clarendon and Lord Taunton in the 1860s. It is not just in the last 20 years that there have been policies put forward either for abolition or for greater collaboration and partnership, and proposals about funding places in these schools or about taxing them out of existence. However, independent schools are a particular focus of attention now because there are two key, and related, political issues – social mobility and social equity – which relate directly to them.

Mrs May never quite got around to her social agenda as Prime Minister but as she stood, in happier times, in front of 10 Downing Street in May 2016, she laid out her commitment to social mobility and the reward of virtue:

*"I want Britain to be a place where advantage is based on merit, not privilege; where it's your talent and hard work that matter, not where you were born, who your parents are or what your accent sounds like.*

*"When it comes to opportunity, we won't entrench the advantages of the fortunate few; we will do everything we can to help anybody, whatever your background, to go as far as your talents will take you."*

The Social Mobility Commission was set up by Nick Clegg in 2011 as he declared that social mobility was to be the prime social policy of the coalition government. In April 2019, the Commission's report made direct reference, for the first time, to the impact of independent schools on social mobility:

*"There is a moral imperative for [independent schools] to take meaningful and concrete steps to support education in their local, national and international communities.*

*"Independent schools run the risk of entrenching privilege. They are... increasingly financially inaccessible for significant proportions of the population... Independent schools, at the very least,*

*need to be more socially diverse in their makeup, not least because the present lack of diversity represents and perpetuates inequity."*

The Social Mobility Commission's focus on the role of independent schools is not the only sign of the times. The Sutton Trust, under the potent leadership of Sir Peter Lampl, a Direct Grant product of Reigate Grammar School, has for a long time been the most audible voice on this issue and the significance of independent schools as being both a cause of and the potential solution to inequality. In 2017, the Sutton Trust published a Mobility Manifesto and one of its 10 proposals was:

*"Help transform social mobility at the top by **opening leading independent day schools** to all based on ability rather than ability to pay and promoting more partnership working between sectors."*

Lee Elliot Major was a key figure at the Sutton Trust for several years and his most recent book, written with Stephen Machin, *Social Mobility and Its Enemies* (2018), certainly sees independent education as more enemy than friend.

So, education, now more than ever, has taken on the role of the key motor of social mobility, the force that can overturn the inequities of our society. Barnaby Lenon, chairman of the ISC, expressed this very clearly at the AGBIS conference in May 2019:

*"There is now a belief that education is no longer only about helping individual children learn as much as possible of those things that adults deem important. It is now equally about social justice, social mobility, equity and equality of opportunity. This belief now encourages many leaders to say that the main purpose of education is to get children from poorer homes up to the academic standards achieved by middle-income children. So, the Education Select Committee chair Robert Halfon MP, said last year: 'Tackling social injustice is the central objective of the Education Committee.' Not 'an' objective but 'the objective', note. This is what many politicians and education leaders believe."*

In the current climate of political division, independent schools are obvious targets not only for the alumni they produce – Cameron, Johnson and Rees-Mogg may not have helped – but also for their impact on the university market and their alumni's representation in the upper strata of professions and society in general. Even in the short time between the first draft of this introduction and this final version, there have been further developments: for example, in September 2019 the Labour Party voted that the abolition of private schools should be in the next Labour manifesto, even if it was not entirely clear how this 21st century abolition of the monasteries could be carried out, and even if it didn't actually get into the manifesto.

However, independent schools cannot simply blame the times and the politicians. Over time, independent education in general has become more expensive. I don't think that anyone ever really meant it to be that way but it has happened.

Lots of schools did think they had good reasons for such fee increases at the time: they must have because I was both a head and governor for more than half of those years. Those reasons would have been manifold: the need for development and refurbishment of

facilities in a competitive market; the provision of wider expertise to teach a wider curriculum – and extra-curriculum; the increased costs of administration, regulation, compliance, HR, marketing, admissions, development. And, for most of those years, the number of pupils in independent schools was growing; there was an increase in pupil numbers of 40,000 in ISC schools during the Blair decade.

We are only 40 years on from the time of the Direct Grant system, which provided state-funded accessibility and diversity. Even the Government's Assisted Places scheme, the smaller successor to the Direct Grant system, which ran from 1981 to 1997, involved 355 schools and educated 75,000 pupils at a cost to the state of £800m. 1997 is not that long ago.

Robert Cary Gilson, a great headmaster of King Edward's School, Birmingham, wrote just over a century ago:

*"No community, and no generation, can afford not to give free play to the natural inherited powers of its members... Of all the means of bringing ability to the front, none can compare with cheap – to the parent – and efficient education. The ideal should be so to order our educational system that the inborn qualities may have full play in whatever rank of life they may appear.*

*"Secondary schools, from their very nature, must be select schools, but the selection should be by natural powers not by accidental or artificial circumstances, nor by the wealth or poverty of the parent. The poorest boy or girl should be able to rise to the full height of position and responsibility in the state for which his or her natural endowments are adapted."*

Theresa May would have been impressed.

For all these reasons, accessibility must matter to our schools, particularly working alongside the material growth in outreach and partnerships. Since this is so, what is actually going on in bursary provision and, more particularly, in fundraising for bursaries? Before we set out on this serendipitous journey, here are some thoughts about today's situation.

1. There is progress. The ISC census shows a material growth in the area of means-tested bursaries: £24m more was spent on means-tested bursaries in 2019 than in 2018; expenditure on means-tested funding has grown from £260m in 2011 to £422m in 2019, an increase of 62%. Fees have increased by 34% in the same period. Increasingly, money is being passed from non means-tested scholarships to means-tested mechanisms.

2. Different schools are funding their bursary provision in different ways. Some, a few, have large, ancient endowments which they choose to spend on bursaries. Others, more in number, have been able to raise substantial funds, whether from alumni or parents or both, for this purpose. Some use fees from fee payers to subsidise the fees of those who cannot afford to pay full fees or any fees. Others deliberately and specifically allocate the revenue raised from commercial activities (the hire of the site, for example) to bursaries. Others, an increasing number, have made a clear undertaking that the revenue from setting up overseas schools will be used for bursary provision. Some are lucky enough to combine more than one, even several, of these elements.

3. In the last decade, there has been much talk about ways in which the state and the independent sector might become yoke-fellows in increasing access to the independent sector. One of the most visible solutions put forward has been the Open Access scheme advocated by Sir Peter Lampl. However, it's hard to conceive, especially in the current political climate, that any government is going to be seen giving money to independent schools no matter how noble the cause. As Elliot Major and Machin write in *Social Mobility and Its Enemies*:

*"Paying for a fully blown 'open access' scheme – operating for around 100 leading independent schools – is a difficult sell to ministers on both sides of the political divide. Labour politicians are opposed to more academic selection, while Conservative politicians are nervous of diverting state funding to the private sector, particularly when budgets are tight."*

Since this is so, or something like this is so, accessibility is an issue of great importance and this is a critical moment when there is change and the need for more change. In which case: 'Let us go and make our visit.'

## Chapter 2:

# Christ's Hospital: 'A School Like No Other'

### Introduction

*The board at the front gate reads 'CHRIST'S HOSPITAL, A SCHOOL LIKE NO OTHER' and with good cause. The school's foundation in 1552 was not unique: it was one of 30 schools founded by the boy king, Edward VI, during his brief reign, and the Royal Charter was signed just 11 days before his death in 1553. The school was founded on old buildings vacated by the Greyfriars in Newgate Street in London and from the very start was funded by the Church, the City of London, businesses and individuals, to provide education and care for 'fatherless and poor children'.*

*Christ's Hospital, for nearly 470 years, has remained constantly true to its original purpose, providing both education and accommodation for the vast majority of its pupils. In 1552, it was immediately a very big school with 380 pupils, admitting girls from the outset - centuries ahead of its time.*

*The school was destroyed in the Great Fire but then rebuilt through the generosity of benefactors to a design of Christopher Wren. In 1682, the school created a separate boarding school in Hertford and in 1902, the boys from the original site in London and Hertford moved to the present site in Horsham, thus leaving a girls-only boarding school in Hertford. In 1985, the Hertford site was closed and the current co-educational school was created.*

*During almost all of these centuries, more than 90% of pupils were fully funded by the school and it is only since 2008 that the proportion of fee-paying students has increased to more than 20%. Such philanthropy over such a long period of time can produce some remarkable numbers: the school estimates that over 65,000 students have been funded through the school since its foundation.*

*The school's mission states:*

*"By providing first class, free or supported education to talented young people from disadvantaged and modest backgrounds, Christ's Hospital helps them to reach their full potential and transforms lives in a way that no other educational establishment in the UK can match."*

*Today there are 906 pupils of whom 830 board with an equal number of boys and girls. Of those 906, three-quarters receive means-tested funding and one-third receive financial support worth more than 90% of the fees. And a high proportion of those students come from London, emphasising the connection with the ancient origins of the school.*

*The sense of historical continuity is also emphasised by the preservation of the uniform of long blue coats and yellow stockings from the 16th century and by the preservation of the ceremony invented in 1868 of a band of over 100 musicians playing the school into lunch six days a week. That alone would make it 'a school like no other'.*

**Hugo Middlemas (HM), director of development, and Sarah Clifton (SC), partnership manager**

JC: Everyone knows Christ's Hospital as a very special place. Could you very briefly explain the history, your existing bursary provision and the challenges that lie in running such an extensive bursary programme?

**HM: Christ's Hospital has remained true to its founding purpose in 1552, providing transformative boarding education to children from challenging social and economic backgrounds.**

**The school was a great pioneer in social mobility and still leads the way: 662 of our 906 pupils have means-tested bursaries. Of these, 631 have means-tested bursaries for 50% or more of the fees. Three hundred and four are receiving 90% plus bursaries and 118 receive 100% bursaries. In addition, for those on the biggest bursaries, we support further costs such as sports kits, travel to school and music lessons. The average bursary is 83%.**

**With that scale of provision, and fees at more than £35,000 per annum, the challenge lies in securing the £18m plus needed each year to fund the bursary programme. Our endowment, based upon the original provision, and constant philanthropy, covers under 50% of costs. So we are heavily reliant on donations to maintain the school's mission.**

JC: All of this does make you a unique institution.

**HM: Unique in the UK at least. The proportion of students who have bursaries has changed over time. For most of the school's history, it has been 90% plus. There have always been a small number of full-fee pupils, even from the very earliest days, but it has been 90% plus for the vast stretch of the school's history. We had a period with the last recession of 2007/8 where our endowment took a very big hit: we lost about one-third of the value. At that point, decisions were required as to how the charitable mission could be sustained and the decision was made that the number of full-fee payers should be increased. So, the full-fee payer proportion went from roughly 5-10% up to 26%. We are currently on 24%.**

JC: That does show the scale of what is needed if schools really are going to be truly accessible and support a lot of students. However, this isn't just a matter of money. What does the school do to ensure that the money is being spent to achieve the life-changing ambitions that you have?

**HM: Having the right infrastructure for admissions and pastoral care is critical. We invest very significantly in identifying those young people who could most benefit from places at Christ's Hospital, gaining deep insight into them and their home situation and ensuring that we have the pastoral and academic support in place to enable each student to thrive. There is also great demand for places because we have these long-term, even ancient links: around 600 boys and girls apply at 11+ each year. As well as a comprehensive pastoral care programme, a range of support structures**

**within the student body play an invaluable role in ensuring new students settle well and the impact of challenging home and personal situations can be supported during a student's time at the school. With the high level of diversity that results from our approach, we can be confident that students from any background can fit in.**

JC: How do you generate such a level of demand for places?

**SC: Above all, our marketing and admissions departments are promoting bursary places. It starts with working directly with other charities, local authorities and the headteachers of schools in specific areas where there is a high level of deprivation. We will always work with London because of the school's historic ties there. But there is always change. The coastal areas of the UK have emerged as a priority focus relatively recently. For example, we have been working in Thanet with a number of schools in two academy trusts.**

JC: I happened to speak to Paul Luxmoore, head of Coastal Academies Trust recently. He was deeply excited by his relations with Christ's Hospital. He can't believe what Christ's Hospital is offering.

**HM: Word of mouth from sustained marketing is crucial. This means that a teacher or parent or friend, might think that Christ's Hospital is an opportunity for a child who could benefit and encourages the first contact with the school.**

**Sometimes we face barriers. Some will look at us and think: "No way. That's a posh public school with its uniform and its traditions." We need time to build up trust with families and communities to the point where they see the opportunity and the school for what it is.**

**SC: A very effective way of building trust has been identifying specific schools and bringing their pupils here on, for example, a choir day or a science day. It helps to get the teachers and their parents along to see that a place at Christ's Hospital is a huge opportunity. We have to have integrity and really mean it when we say we are not just about creaming off the brightest pupils. We are trying to provide for those with the greatest need, particularly where boarding can help relieve challenging home circumstances.**

**HM: Often a school or a charity will say: "We know what you are coming for, to take our best kids. That's what other schools do." We can say with integrity that our focus is those who are in need of a boarding education.**

**SC: Those who are not going to thrive in their current educational setting – but can thrive here.**

**HM: And one of the reassuring messages we can give to schools and families is that if their child comes here, they will fit in.**

JC: I did say that this provision wasn't just a matter of money but without money it couldn't happen. So, how do you set about that?

**HM: Securing funding for an extensive bursary programme is a major consideration. While many independent schools can look to parents for significant donations, the profile of our parents – the vast majority of whom have been means-tested for the bursary assessment – means few have the capacity to provide significant philanthropic funding. While around 1% of our donations come from parents (compared to 70% or more at some independent schools), we are delighted that our parents are now participating enthusiastically, even if this is through a few pounds a month. However, our principle focus and principle source of funds being donated has been from our alumni and from unaffiliated individuals and organisations that have an interest in supporting disadvantaged young people.**

**SC: For our alumni, this support is primarily through legacies. It is interesting that our alumni would rather give a significant gift through a legacy than in their lifetime and we think that must reflect their life experiences here and before joining the school.**

JC: So, if alumni matter, what have been the devices that have got your alumni on board?

**HM: One of the mainstays has been our Governorship programme, a child sponsorship approach. That's been going for hundreds of years. An individual or an organisation, such as a livery company or a foundation, will make a substantial donation, which in turn allows them to support an individual pupil. For our alumni who have benefitted from the programme, that is what they aspire to do as a means of giving back.**

**SC: And then there's the Charge. It is a short paragraph that is read to the pupils by the headmaster in the Leavers' Service on their last day at Christ's Hospital. They are asked to always remember the benefits they have had in coming to the school and in time to come to enable others to have the same opportunity. For some, that is very deep-rooted and during their lifetime, they will be eager to act on the Charge by sponsoring a child at the school.**

JC: At Manchester Grammar School, the last words they hear are not from the high master but from the development director.

**HM: I lead an assembly for the leaving year group in the Lent Term where I ask them to start their response to the Charge. We hand out direct debit forms during the assembly and ask them to sign up to a monthly donation before the end of term.**

JC: Obviously, this is built in deeply to the school's purpose. So, how much do your alumni contribute at the moment and how is that changing?

**HM: On average, our alumni have donated £2m a year. In the last couple of years, this has grown to £3m a year. That has increased significantly over the last 10 years. Legacies have been a major part of that growth. On average, we receive £1m a year from legacies although in recent years this has grown to £2m or more. In each of 2017 and 2018 we raised £5m from over 1,200 donors and nearly £6m of that came from legacy giving. Three-quarters of the alumni giving in this period came from legacies.**

**The number of alumni donating each year has grown as we increase fundraising activity, but the value of non-legacy gifts has declined somewhat, as there have been**



**fewer major gifts from alumni. As a result, we have increased our focus on non-alumni supporters, particularly in establishing sustainable partnerships with organisations.**

**The scale of legacy giving is probably unique here. It goes back to Sarah's point that legacy-giving is the preferred route for our alumni – and our parents.**

**SC: It is very striking that it is true of parental giving, too.**

**HM: We understand the motivation for some alumni and parents. They want to ensure that they are set up financially, particularly if they have children or grandchildren. Some are concerned that making a significant donation during their lifetime could put their and their family's circumstances at risk again. A legacy allows them to make sure their loved ones' needs are catered for while supporting Christ's Hospital with their most significant gift.**

**SC: I don't think our alumni ever really think that they are wealthy, even when they have been hugely successful financially.**

**HM: To go back to the numbers, we have a fundraising running rate of about £3m from all sources. The last couple of years we've been up at £5m, a couple of very strong years, helped by the legacies. Even £3m is an increase from the last five years. The Governorship programme remains central: at the moment, about 245 pupils benefit from that programme.**

**JC: Could you talk me through the design of the Governorship programme in more detail? The sponsorship model is very effective in a number of schools and clearly is vital here.**

**HM: Originally, the Governorship programme worked like this: A donor would give one year's fees and the school would then match that with the fees for the other six years. However, that traditional mechanism had two different flaws or limitations. The first was that, for some people, contributing a year's fees was beyond their capacity, even though, at the other end of the scale, there were individuals who could cover the full seven year cost. The second flaw was that it was very demanding for the school to find the funds from internal sources to provide the six-fold matched funding.**

**In the case of the first problem, we know that participation in giving was key as this leads to legacies, our greatest source of funds, so we needed to have a proper direct marketing programme that went beyond the usual annual telephone campaign. To that end, we have brought in a collective funding approach to sponsor individual pupils in full. We call it the Blue Fund. We tried a year group approach but with the exception of one group, it was premature. That's something for the future. The Blue Fund is open to anyone, whether you are an alumna/alumnus, a parent, a member of staff – everyone is chipping in. We might have over 300 people contributing to funding a single pupil.**

**We have 500 donors in these collective programmes. At the other end, there is the full seven year bursary funding, with all costs. This is something that we have focussed on in the last four years through our partnerships with organisations – with multi-year partnerships perhaps funding one or two pupils a year.**

JC: Since we are now talking about the innovations that you have brought in, could I ask about your own professional backgrounds? When did you join Christ's Hospital and where had you come from?

**SC: I had been a fundraising consultant prior to being here. I had worked with fundraising charities and I came here in 2014.**

**HM: I arrived here in 2015 and had been a fundraising director at several national and international charities. We were both new to schools, which in some ways was a helpful thing as it allowed us to look at Christ's Hospital as a social mobility charity rather than simply as a school. One of our early questions therefore was 'why aren't we getting funding from charitable foundations?' The school had been told by consultants that we would never be able to access funds from non-alumni. That was like a red rag to a bull for us!**

**SC: I think that's what scared us, as people from charitable fundraising backgrounds, was that every year our fundraising income started pretty much at zero. There was very little already committed for each year and so sustainable partnerships were critical as the school is so reliant on fundraising.**

JC: So what kind of institutions are they with which you form partnerships?

**HM: Mainly foundations with a focus on supporting disadvantaged children and social mobility. We do have some funding from livery companies but not at the full bursary level.**

JC: In fact, for most schools, it's very hard to raise funds from external sources as you have. Perhaps this is another way in which you are a very special case: your unchanging tradition and the scale of what you do means that charities view you differently.

So, at the moment, regular giving is not a large part of the system?

**SC: Our regular giving is currently £340k a year. That needs to be closer to £0.5m. The partnerships currently in place are due to deliver just over £1m a year.**

JC: So, you have created a system where the money is being spent to make an immediate impact, which is what your donors want, but you need to keep feeding the fire each year, don't you?

**HM: Correct. We would of course like to build our endowment further but the immediate needs are so great.**

JC: Presumably it takes time to identify those charitable trusts that will support?

**SC: It has taken time and longer than we thought. Surprisingly, for all its remarkable work, Christ's Hospital has rather a low profile amongst major philanthropists, the media and in the world of politics. It still seems that the world concentrates on a few more famous schools. That has made it challenging to access major philanthropy.**

JC: What might the other complexities or limitations be on what you are doing?

**HM: One thing that people do consider is that Christ's Hospital is wealthy and the endowment is very big at £370m. However, the endowment is fully occupied in funding just under 50% of the school's costs. So, we have to make up the difference with substantial fundraising. Unlike many independent schools, we cannot access very wealthy parents. Setting up international schools is also not an option for us as replicating this model wouldn't work – setting up profit-driven schools would be alien to our brand. Each school has to make its choices based on its mission and circumstances.**

JC: I know that your alumni body is much more onside than any other because of their own life experiences in coming here. What do you work at to ensure that their warmth for the institution does not cool?

**HM: The starting point, as with any charity, is showing the impact. And, for our alumni, that is hearing about and seeing the pupils who are benefitting today. Another very important part, which is very special about this school, if not unique, is the common bond our alumni share through having had life-changing opportunities at this school. We need to ensure that this is something that remains alive and so the programme includes a lot of networking. The alumni have a very strong global network. We believe there are 11,000 living alumni, of whom we are in contact with over 8,000. It's a good proportion.**

**SC: The school has shown a lot of foresight here. Many schools struggle with the alumni being a separate foundation. We had that painful transition some years ago, so it was already in much better shape than a lot of places. On the other hand, we really have had to focus our efforts on not losing them as they leave here.**

JC: And how do you measure success?

**HM: You'd expect us to have Key Performance Indicators so that we can keep track of this. Last year, we had engagement with 63% of the contactable alumni. It is a high level of engagement and we know, because we track it, the connection between them is very strong too. There is a lot of social media activity and they want to support each other. That's a driving force.**

JC: And what is the size of the team that does all this?

**HM: We have 6.5 full-time employees who are responsible for all the work that is done for the alumni, events and publications, direct marketing, data management and so on.**

**The bursary programme is our single biggest focus. It's something that everyone understands. It's central to our purpose. We have had funding from our alumni for a handful of capital projects but not on the scale of other independent schools.**

JC: And, finally, what's next for your team?

**HM: Our current fundraising campaign target is £40m, of which we have secured £36m in real donations and in pledges. Next up, we aim to raise a further £17m to fund an additional 18 places in perpetuity.**

JC: In that case, I'd better go to let you get on with it.



## Chapter 3:

# Bolton School

### Introduction

*Bolton School, Boys' Division and Girls' Division, was created as a foundation in 1915 by Lord Leverhulme, a hugely successful industrialist, whose business empire became what we know today as Unilever. He was a child of Bolton and a classic Victorian philanthropist who wanted to establish a school in his home town. His original intention was for this school to be co-educational, bringing together two single-sex schools that already existed.*

*Neither of the heads of those two schools at the time shared this wish so, instead, it was agreed that there should be the Bolton School Foundation, comprising two single-sex schools on one site, each a mirror image of the other.*

*The history of the two original schools stretches back much further. In 2016, the Boys' Division celebrated the 500th anniversary of Bolton Grammar School for Boys, whilst the Bolton High School for Girls opened in October 1877. Both incorporated junior schools, which have grown significantly over time and are now separate schools within the foundation, each with their own separate buildings – Park Road and Hesketh House. A co-educational infant school, Beech House, completes the five schools within the foundation.*

*Both divisions were part of the Direct Grant scheme from the 1940s to the 1970s and then followed the trajectory of such schools into the Government's Assisted Places scheme. At the height of the Government's support, the schools had free places for one in three of its pupils. As the Assisted Places scheme ran down in the early 1990s, the governors of Bolton School showed more foresight than most and started to prepare for the inevitable end of government support. In 1997, days after the Labour Party's victory in the general election, they immediately agreed to set up a bursary fund to replace this funding stream and thus safeguard the numbers, social diversity and high academic standards of the two schools.*

*Since that time, the school has raised £17m from 2,200 donors, enabling the bursary fund to support over 1,800 pupils through the two schools. The school has also contributed £20m itself over that time to the provision of bursaries so that it has spent over £25m on bursaries but still has reserves of £29m. Today, there are 342 bursary pupils across the two divisions, of whom 140 receive more than 90% support.*

*In February 2019, Bolton School succeeded Latymer Upper as the TES Independent Secondary School of the Year and Independent School of the Year. Lead judge Dr Helen Wright said Bolton was chosen because of "their impressive outreach and the way in which they involve the whole community in a plethora of enriching events". In June 2019, Bolton School was also awarded the Fundraising Campaign of the Year Award at the IDPE annual conference.*

## **Sue Hincks (SH), headmistress of Bolton School Girls' Division**

JC: Perhaps we could start with a brief account of your own career in teaching and your vision of Bolton School as you arrived.

**SH: I started in the state sector and then spent 11 years in two affluent boarding schools, before I became deputy head at King's Worcester, where I was for seven years. This is now my eighth year here at Bolton. When I was appointed, it was made clear to me by the chair of governors that one of the *raison d'être* of the school was that we should ensure that this type of education should be open to anyone of academic merit. That meant that a large premium was put by the governing body on bursaries. It was explained to me that, when John Major won his victory, the governing body had assumed that he wouldn't and that Tony Blair had it in mind to put an end to the Government's Assisted Places scheme. So, at that point, they started putting aside money for bursary support and this is how the endowment fund has grown as it has. That was largely due to the foresight of the current chairman of governors, Mike Griffiths, who is going to retire at the end of this year. He was chairman of finance at the time and he has been the driving force all through his time here.**

JC: When you came, what was the situation with bursary fundraising and how did you see your own role in that purpose?

**SH: We started out with a series of alumni dinners and those still go on, with a few changes. The largest is in London but there are also dinners in Oxford and Cambridge. There was one in Bristol and we still have one in Edinburgh. There we meet potential donors and at the end, Philip and I speak. We divide it up: Philip does the comedy, I do the emotional thanks to the donors. That's our main fundraising role.**

Each one of the Divisions also has its own Parents' Association but the parents give less here than in some schools. That's partly because there is a Parents' Association levy every term, so the parents might feel that they are doing their bit. In my time, the Parents' Association has run two balls (and are planning a third) where they have raised money and that money has gone to the bursary fund. We also have regular old girls' lunches in school every term. Inevitably, these are local women who were here at a certain point and are at a certain stage in their own lives, so there will be a certain number of donors in that group. We do a lot of nurturing of old girls through books and magazines but we also have the alumnae network, which is an online platform. We have an active Twitter account and there are various events which I have inaugurated to make the old girls feel more at home here. The first one is our Armistice Day assembly. The old girls attend and walk in with the prefects. That's a big part of assembly. And then there is a lunch after that and about 60 people attend. And, after the carol service, a time when lots of old girls come back, we now have a special old girls' room – indeed two special old girls' rooms because it is so popular – to entertain them. We have an old girls' liaison officer who is a former teacher. She is wonderful with the old girls, knowing everyone and chatting. We do lots of things with the old girls with careers in mind and that is a form of giving back, part of a virtuous circle, but it might also lead to a level of engagement that could lead to giving. On 9 March 2019, International Women's Day, we are holding a very big careers fair where old girls

**are coming to meet current girls, offering themselves as mentors, and we have a keynote address from Stephanie Barwise, who is a QC and was involved in the Grenfell Tower inquiry. So the girls will see a relatively recent old girl in action.**

**So, I suppose it's learning from the alumni office what they want of you and then doing as you are told – and prioritising it.**

JC: And how do you get the message out?

**SH: You need to be quite subtle about asking for money. In my early years, it hadn't necessarily been the case that we talked about funds at the dinners. It was more a matter of telling old girls and old boys what was going on at the school. I suppose I went to a college that was not shy about asking me for money. I realised that there is no embarrassment so you might just as well do it.**

JC: At those events, are you actually asking for money?

**SH: We are not asking as directly as when we are going to America at Easter 2020. At these home events, we are more explaining what we do with the money and thanking those people who have given. In doing so, we hope we might encourage other people to think about giving.**

JC: The difference between what a girls' school can raise and what a boys' school can raise is a big issue. Everyone agrees there is a gap in terms of quantum. As far as I understand Bolton, there isn't much of a difference in the number of donors between the two schools but there is a difference in the amount given. Do you think that girls' schools should be more confident they can raise money?

**SH: I think they can be bolder than many assume. There is the reputation that old girls don't give as much in financial terms. Although you may have the same number of donors as a boys' school, the amount of money raised isn't the same so you might feel that it isn't worth the candle. It is taking time out of other priorities you might have. On the other hand, most heads will know what universities are doing now to considerable effect. You can imagine there will be a future when women are earning just as much as men and their pre-occupation will be giving to institutions, not just looking after the long-term financial welfare of their families. Indeed, there are likely to be lots of women who go on to have professional careers but do not have families or not large families.**

**And the other thing that is significant with girls' schools, and has been significant here, is former members of staff. Girls' schools have a tradition of long-serving members of staff who have been single and they will often give to the school. Even for those who have their own families, giving to a school does seem to be a generous proposition. So, I would argue that girls' schools can forge ahead more than they have but it is always going to be difficult for a head who has to balance priorities. This is a particularly tough call for girls' schools: they might be smaller schools with a lower fee base so that deciding to go whole hog for a well-paid development director is sometimes a bit scary. I remember when we appointed the replacement at one of my**

**former schools, it was quite a shock that this person was going to be earning more than a deputy head. Perhaps there is some mechanism by which smaller schools could share a director of development to do the asking. Each school could have its own team but the strategic push and the ask might be from someone who was shared. It's effectively what GDST is doing and that might be something that all girls' schools have to think about.**

JC: Do you feel that the time commitment is manageable? After all, you'd be at a lot of these alumni events anyway.

**SH: I am not sure we'd have quite so many events if we weren't raising money. We are going to Cambridge on Friday and that means we'll spend Friday travelling at the beginning of half term, to the other end of the country. Philip and I don't have a problem with this and you have to treat it as an enjoyable night out in a very nice place. And, at least we have each other so, in a crisis, one of us can go and the other stay behind. Most schools can manage a London dinner or a dinner in their own school. We did a brilliant event for the centenary where all of the head girls and school captains came back. They were not only leaders in their own age group but also, they tend to go on to be quite successful. When we hold year group dinners, those who attend are more interested in each other, their own year group, than they are in meeting the current or past staff or the current head. These big year group events don't really need us and so we don't always go.**

**Another thing we have done is dinners for bursary recipients and this works well as long as the people who are there are not embarrassed. When they are in the school, we don't say who is or who is not on a bursary. I know but the staff don't know. But once they have left, if they are willing to put their names to things, former bursary recipients can be useful in inspiring people to give as well as being personally generous themselves.**

**Of course, the two Divisions benefit enormously from the generosity of the boys and girls who were here under the Direct Grant scheme. A question for us in the future is whether today's current beneficiaries will be equally generous.**

JC: The endowment of the two Divisions has grown not only through donations but through the commitment of funds by the governors from school resources.

**SH: The governors have always been committed to that principle and at present a certain percentage of the total fee income is directed towards the bursary programme. That amount has grown over time and, even in times of cuts, it has remained sacrosanct.**

JC: Of course, you need the kids who are going to benefit as well as the money and some schools say they have more money to give away than they have kids.

**SH: I do hear that. At one of my first schools, we had a free place each year and we couldn't fill it. In some areas you have very good state schools and people can play off one bursary against another, so they aren't easy to give away.**



JC: And, in very high-performing schools, it is important that the bursary students can cope and thrive.

**SH: One of the big issues we have to think about is the applicants' cultural capital up to Year 6. We are interviewing at the moment for bursaries. A lot of the children we are interviewing are 'English as an additional language' (EAL) and that needs careful thought so that they are not penalised. Even if they are not EAL, they may not have had the experience of being asked about books they have read. The candidates don't always automatically have what you might want for an academic bursary interview. On the other hand, in some communities, the parents have learned that, if you want to apply for Bolton School, you have to prepare for the test and the interview for a couple of years beforehand. The key is for the interviewers to look for potential, regardless of prior opportunities. As a school we also lay on activities for the community to 'train people up' as it were.**

JC: Since recruitment clearly matters, can you explain the numbers on entry?

**SH: We take in 125 girls each year at Year 7 and of the 125, 50 come from our own junior school. So we have 75 places for the outside world. We had 251 applicants from outside and about 180 wanted a bursary. A lot of people tick the bursary box, even though they don't really qualify, and we convert a number of them from being bursary applicants into full-fee places. Some of our junior schoolgirls also apply for a bursary, although there is no bursary provision in the junior school. We have talked about doing bursaries in the junior school but it is problematic. It is always difficult to test and give a bursary at an even younger age and then there is the question about what happens at the age of 11. Do you keep on supporting them into the senior school?**

JC: Why do you get so many bursary applicants?

**SH: Bolton used to have, until the 1980s, three types of schools: secondary modern, comprehensive and grammar. The Direct Grant schools were deeply embedded in Bolton culture. We had 34 girls in the school under the Direct Grant scheme, so the accessibility of the school goes back a long way. We've also done a lot of outreach and one of the biggest parts of that is the Shine programme, which the Shine charity supported. This predates me. So, it is well understood, especially in certain communities, that bursaries are available. But it is also clear that there are some communities that we are not reaching. We do a lot of writing to schools and we are quite embedded in the group of secondary headteachers.**

JC: Has your outreach been more aimed at junior schools than secondary schools? What is the balance?

**SH: It has changed. It has been predominantly junior but we have cut back on that. We didn't have a sense of what was marketing and what was outreach. That's a semi-conscious change which we might have to revisit. It's difficult. It's a bit like the alumni dinners or lunches. You do them because there is a gain. If the gain isn't big enough, you stop doing them. We don't need to do any more of those things to get people in because we have been so over-subscribed recently, although the flow might dry up.**

**We are now doing more with secondary schools because the Bolton headteachers are asking for stuff. We are also doing the school-centered initial teacher training (SCITT), which we are doing because the DfE asked. There are specific headteachers from the primary sector who are close and we always say yes to their requests for help. And our facilities are quite heavily used by junior schools and that probably means that people know about us.**

JC: In terms of your outreach, how many junior schools are you working productively with?

**SH: It varies from year to year with the Shine programme. Probably 15 in one year but our catchment would be more like 40 different schools.**

JC: Can I ask about pastoral care and outcomes? Do you think that with your bursary kids you have to care more or focus on them more? Do you have any data about outcomes?

**SH: I used to do a lot of anecdotal data. I've stopped doing it because it didn't really get any traction with the governing body. So Philip is doing much more strategic data. I often say to governors that one of the big issues for girls is what happens at 15. If they start hanging around with the wrong peer group and start going out with the wrong boy, that can be trouble. I know that boys can have adolescent troubles but I worry about the 15-year-old girl who goes off the rails.**

**When I first came, that seemed to be a big problem for bursary kids. So, out of 15 bursary kids, maybe two would be like that. At that point, we were going to pay for someone to specifically nurture the bursary girls. But then I thought about how we were selecting these girls. In every case, it was the parents who were not as engaged as we would have liked. So, what we do now as part of our interview process is interview the parents or carers and make sure they are going to support their daughter as she moves up the school.**

JC: You said that you are aware of which girls were on bursaries but this is not shared with your teaching staff. So, you feel that your natural, normal pastoral support is enough?

**SH: Yes, I do. I know all the girls and I meet all of the pastoral heads every week: someone might mention something and I can relate that to what I know. Occasionally I might suggest something but pastoral concerns aren't coming from the bursary kids. We hope the changes we have made in selection have helped in this regard. Of course, things can happen to change and disrupt a family. But that can happen in any family.**

JC: The next aim for Bolton School is to get from a fifth of bursary pupils to a third. How will you get there?

**SH: One thing we haven't talked about is the business arm that raises money. There are two components to that: BSSL, Bolton Schools Services Limited, which runs our transport system – the coaches, the events on the school site and Patterdale Hall, our outdoor pursuits centre in the Lake District. And we also have a nursery, which I oversee. The nursery for younger children was specifically built to provide money for bursaries.**

JC: Like a school in China but closer.

**SH:** My vision would be to have more. It's not easy to do it well but we have talked about taking over other nurseries, expanding the brand. The problem is finding the right people to run them. But nurseries do provide funds and other schools might wish to consider such an approach. It might be where girls' schools could have some strength, even if it doesn't quite have the panache of foreign schools. We did also look at a boys' school next to a girls' school in the UAE and that is potentially still on the agenda. However, it is a matter of opportunity, cost and the time it might take from Philip and me.

In terms of fundraising, we still need major donors but we would want to make giving more normalised, not least because more people are used to being approached by their universities.

One of the ideas that worked well at one of my former schools was year-group giving, although I haven't had any traction here with it. They had dinners every year and you'd sit at your table with your year group, and there'd be a challenge as to what each table could give. There was a '69 bursary, for example, and I liked that. I can't get anyone to fall in love with that idea here. Perhaps it seems a bit naff or perhaps there is less sense of competition in a girls' school. When we were talking about this on the governing body, the old girls amongst the governors said I should make more of the fact that the boys were giving more than the girls. They suggested competing against the Boys' Division.

The other thing to consider is marginal discounting of fees, although this is not something that our governing body wants to do. Many schools that do not have anywhere near our endowment fund do bursaries in this way. You decide what your break-even point is and then you say: "We can fit this number of students into the classrooms beyond break-even," and these can be bursary pupils. I have been very keen on that idea at different points, not least because I have a lot of girls trying to get into the sixth form. Of course, the amount you can do in this way is limited by your fee increases, which we have kept very low in recent times to help the squeezed middle.

JC: Can I return, finally, to your development office – how it works and why it succeeds?

**SH:** Laura, the development director, is very, very good. She was number two and is now number one. She has a very open personality, is very clever and very adaptable, but you can't push her around. I think the first time I was there when they made an ask – this was Laura's predecessor – I was totally shocked about how brazen they were, but it worked. They were very professional, too. I had said on many occasions that it was not a job I thought I could do and they took that to mean that I didn't think it was a worthwhile job. Of course, I didn't mean that and I do understand that their job makes our job possible. If you can do it, it's a great thing to do. They are also very convivial, because a lot of the job is hosting people at dinners and they are good at that. They are very well staffed and resourced, too.

JC: It's not been easy to run a successful independent school in the north west in recent decades. How material has the financial support for bursaries been in securing success?

**SH: We always say that our success is down to buses and bursaries.**

JC: In that order?

**SH: We need the buses to get people in. We run 28 routes. Not every route is operated by us – we do work with operators – but a lot of the buses are ours. It's quite a sight at 4pm. That means our catchment area is a lot wider than it would otherwise be. The furthest is a 42-mile journey from the north. In the Girls' Division, we have a slightly higher percentage of bursary students than the boys. We also have scholarships. They were only created about four years ago to maintain the edge. Each school has a full year's fees each and then we divide it as we see fit. We don't combine scholarships and bursaries.**

**We have a lot of families who look at both us and a grammar school and I know the provision of a bursary makes a difference. And that difference brings bright girls into the school from the widest range of local – and not so local – communities. That enables Bolton School to be the kind of school it is and the kind of school it wants to be.**

**Philip Britton (PB), headmaster of Bolton School Boys' Division**

JC: Bolton School Boys' and Girls' Divisions have just won – deservedly – TES Independent School of the Year, following on from the success of Latymer Upper last year. Could you talk me through the significance of bursaries and bursary fundraising for Bolton School?

**PB: Without a shadow of a doubt, the importance concerns the very nature of the pupils in the school. The governors are clear on the matter and it is part of the reason why I work here. The school needs to be for as wide a range of pupils as possible. This would be a very different place if the sole criterion for being here was your capacity to open a cheque book and pay the fees.**

**We are running at about one bursary boy in five. So, in a form class of 25, there are about five lads in there whom we have funded. This is all about their ability, their character, their likely aptitude for benefiting from the education here. And the other 20 have those qualities, too, but obviously their parents have to afford a fee. The school would be a completely different place if it were not for the bursary funding, for two reasons. First, those bursary boys often, if not always, have that drive and enthusiasm which comes from and creates social mobility: they want to get on and they are often amongst the most able. That is one strand. The other strand is what all of that brings to those who are fee-payers and this is something that is sometimes overlooked. The bursary pupils bring a lot to the school for themselves and achieve a lot themselves, but they also have an impact on the attitudes and values of the fee payers. Not the least of that benefit is, that the fee-paying lads can see other perspectives on life before they emerge from the school gates.**

**That is all cultural stuff: the sense of what the school is about, how we go about things, what it feels like to be at Bolton School.**

JC: And this diversity has an impact not only on the pupils.

**PB: I definitely feel more comfortable to be head here because of the bursary programme, not just presiding over a purely fee-paying school. There is that moral purpose to teaching which allows colleagues to prefer that mix. Many parents do get that there is not much point in educating their son in such an exclusive environment that the wider world is an alien place. They want to have some sense of a community and I think that feeds the school's level of work in the community. It's what gives people the sense that they ought to be doing something as part of this community, rather than just doing something for themselves.**

JC: Running a successful independent school in the north west in the last 20 years has not been as easy as in some parts of the country – to put it mildly. Schools not dissimilar to Bolton School have really struggled for numbers and have gone into the state sector. Could you explain the impact of the bursary programme on the school in enabling the school to remain successful and prosperous?

**PB: We often talk at governors' meetings that one of the purposes of the bursary programme is to secure our independence. If we can choose, to some extent, the pupils who come to the school, that enables us to make the ethos of the school what we want it to be. And these 25 boys in each year do make a difference in terms of admissions and the quality of pupils we can attract. In round numbers, 50 come from our junior school, the bursary scheme funds about 25, so I need 70 additional fee-paying students to fill the school. That is a very different proposition from looking for 90 to 100 from outside of the right sort who have the capacity to cope in an academic school. It is also significant that the degree of selectivity is far greater amongst the bursary pool than it is amongst the fee payers. Amongst the bursary candidates, you might be choosing one out of five, whereas amongst the fee payers, in a good year, that might get to one in two and a bit. In 2011, that ratio was one to 1:2, so we were barely selective. So bursary provision is having an important impact on the academic quality of our intake.**

JC: This strategy is clearly very important for the school now but could you tell me its story?

**PB: The bursary provision has enabled the school to maintain a sense of identity that is attractive to fee-paying parents. There has been a 25-year timespan since the governors decided they had to get to grips with looking after the school for themselves because no one else was going to do it. The first £1.5m for the bursary fund was raised in 1992 by Roger Kirk, a former colleague who has just died. He was the first development director, when development was an alien world: why would you be raising funds? This was an alumni-focussed, open doors bursary fund, all about accessibility. The governors had decided they did not want to be a state school. They had decided this a few years before, as the Direct Grant scheme came to an end, on the grounds of independence, selectivity – but also based on the school's ethos. Therefore, they had to make it work, and as the Government's Assisted Places scheme faded away, Bolton School had already started its work. As soon as you begin, you**

start to see the benefits of having bursary pupils in the school. There was a small fall off in numbers when the Government scheme ended, but not a huge change. Under the Government's Assisted Places scheme, it was one in four with financial support, possibly one in three at the height of the Direct Grant system. Now it is one in five, heading towards one in four. At least when government support ended, there wasn't this huge drop-off, nor a huge change of culture.

At the same time, the governors also realised – and this is important as part of the case study – they had to make the school affordable and financially viable. That's a mixture of things. We say the school has to be affordable and worth affording, and there is a great deal to that little soundbite. You have to have enough cash to be able to make the offer that the fee-paying parent wants, and it has to be affordable enough to make the fee-paying parents feel they can afford it. That mantra, of having an offer, keeping the fees where they should be to have that offer, but also keeping them tight enough so that we are not pricing ourselves out of too many markets, is very important to us. And, furthermore, we insist on budgeting in such a way that we do afford all of the price of a bursary pupil. There's no smoke and mirrors, no marginal discounting. What we see is what we get. If there is a bursary pupil in the school, then the funding for that pupil actually exists – it comes from somewhere. That has been good. It's not only good to know where the money is from but it keeps you keen on fees. If you put the fee up, then your bursary fund is affording fewer boys.

So, these two messages go hand in hand. You have the bursary provision. Of course, that is a story worth telling. And we, the governors and the heads, have had that focus on bursaries. However, we have also remembered that, even in the best-case scenario, three-quarters of our pupils are going to be paying fees and it is vital to keep those fees at a level that as many people as possible can afford.

JC: That is very interesting. And you have managed to do this whilst developing the school's facilities.

**PB: That is a matter of intent. As with the original buildings from the 1930s, the governors believe they should be building things that will still be here in 100 years' time. Therefore, it ought to look good. That is a change in direction. A 1960s building has brick on the back, not sandstone, and the governors gaze on that and see it as a good reason not to do that again. That brick wall is there forever and it was probably for want of a small amount of money.**

JC: You have worked hard to find the funds to support bursaries. So, how do you work hard to get the children who will benefit most to take up this opportunity?

**PB: An important part of that, which is not to be overlooked, is being properly part of the local community. As I arrived, we determined that Bolton School would be part of making Bolton, the town, as successful as it could be.**

JC: You have a civic purpose.

**PB: It's a fairly simple decision process. Are you going to be moving this school? No. Is Bolton going to be moving? No. Do we want Bolton to decay around us? Ideally not.**

**So, we resolved to be part of whatever was going on, to make Bolton work. That is important because it makes all different parts of the community think that this place could be to do with them. That comes from youngsters who come from all over the place to do their swimming lessons here. They are walking through the school. Even things such as the wedding venue. People come to Bolton School, so it has some relevance. There are then the much more obvious outreach programme activities – deliberate, purposeful engagement, for example, with the local Muslim community.**

JC: How does that work?

**PB: There is a Bolton Council of Mosques. And many, many years ago, we arranged twice-yearly meetings. Colleagues from here, colleagues from the Council of Mosques, put together a two-way agenda. They would bring things from their own community: ‘You do this at the school; do you have to?’ Or ‘What about this?’ ‘Does that work?’ We put items on the agenda, which are very often matters that we have been trying to work out. ‘How does that play out in terms of religious belief?’ Four years ago, we had a really good discussion about how we would observe Ramadan and we had a very useful outcome from that. Indeed, we were encouraged to say what would be required at school during those times. The insight we got was that it was the parents’ duty to help their child observe Ramadan in the best way possible within constraints. So, actually it turned out to be helpful to the community to articulate those constraints. Of course, the glue is the twice-yearly meeting but actually half a dozen emails come back and forth each year, either way: ‘There was talk on Friday of this? What’s going on?’ There are issues such as balancing attendance at the mosque in the evening with homework. It’s a very productive discussion.**

**That is just one example. More widely, I don’t think you get a decent pool of bursary applications if they think that this school is not for them. Through a whole range of things, the prevailing notion amongst many different kinds of communities is that we are for them. We engage with the Lads and Girls Club. There are countless things that make it reasonable for a youngster in a school in Bolton to think, ‘I might apply to Bolton School,’ and for their parents to think it might be a worthwhile ambition because it is well enough known that there are funded places.**

**The talk here is that if you drive along the Chorley New Road, past the façade of the school, it looks magnificent. The deal is getting people through the arch. That’s the language we use here. Unless you come through the arch and realise there are human beings inside, then it won’t happen.**

**So, we do as much as we can to get people into school. Of course, there are specific projects, such as Shine, Saturday morning school. Lots of applicants come from there. The difficulty certainly isn’t establishing a bursary pool. We advertise, putting adverts in places you wouldn’t expect: the buses, billboards in less-fashionable neighbourhoods. We take out adverts in free magazines, which go through the doors. They cost hardly anything but go to places where you would not go if you were crafting your advert for your fee-paying demographic. We have an exceptionally benign environment with the local newspaper, the Bolton News. It just likes news and we give them lots of it.**

JC: And, since you created such a large pool of candidates, how do you select them?

**PB: We have changed the method of selection recently so that we do something different from the Girls' Division. One of our donors, an old boy, posed this question as he was reaching into his wallet. It was a pretty challenging question. 'I've made my money investing in stocks and I choose the right ones. How do you show me that you are investing in the right person?' That led us down some quite interesting avenues of discussion. One of the avenues goes like this. 'Are we, by giving a boy a bursary, simply advantaging the boy who gets the bursary?' That's good for him. He's got the golden ticket. Of course, yes. But that's not what we wish to be achieving solely with a bursary. What we want to be doing is to pick someone who, having taken advantage of the education here, will have the instincts, aptitudes, character to do something for whatever community he ends up in. So, has he that sense of giving back?**

**We talk, somewhat airily, of this being a social capital variant of the multiplier effect. If we educate one, hopefully that has an impact on many. That thought drives you back so clearly to the idea that bursaries must be given to able people: they are, after all, means-tested scholarships. So, we decided to establish a pool of bursary applicants, about 50 or so, from the entrance exam on the basis of their scores. Then we choose to believe that each of those boys is equally worthy of a bursary place in academic terms: they will all have shown different strengths and weaknesses. By the time you get to this stage, you've got to pick one in two of them. So, we interview for character attributes. There are some pretty obvious things: a bit of drive and determination, some empathy, intellectual curiosity. Those were the main three strands we alighted on.**

JC: At King Edward's, we considered the extent to which they were nice, clever and active.

**PB: That's the same sort of idea. We asked: 'What is it we actually want?' So, then we designed some questions, not to do with prior knowledge at all but aimed at trying to determine something about the character of a 10-year-old, without being too pretentious about it. You can pick out some traits and that provides a score for us. Then we do a second tranche of interviews, which are about teachability. We show them a video clip – this year's was about obesity – of a topic that they might not have studied but is not utterly unfamiliar. Then we do two things. They answer two or three questions on paper, in a relaxed environment, whilst they are watching the video. They can go back and look at it so that captures the thoughtful learning process. Then they come to an interview and in the first part of the interview, we go over their answers. And then there are five questions off the end of that which develop the themes. Some struggle and some get stronger. So, by the end of all this, we are tending to select those who get bursaries on the basis of their interview performance rather than on their raw test scores.**

**We don't really know yet whether this is making a difference. The first year group of that system are in Year 10. There is some evidence there are fewer bursary boys who are low performers – we can see that through our tracking system. So, I could allow myself to believe that there are fewer boys on bursaries not making a decent fist of it.**



**Whether this will make a decent set of results or not, we'll see, I suppose, in two years' time. What colleagues are convinced about is that all of that rigmarole is worthwhile. We aren't just doing it for the sake of it. In the end, we prefer a character that will fit the school because, if the character fits the school, they will leave the school and do something.**

JC: Do you also look at the parental situation?

**PB: We don't, but Sue in the Girls' Division does. At the moment, we have chosen not to. We could, but I suppose I am much more interested in the youngster. On the other hand, we are thinking of adding a meeting in September of Year 7 for parents of bursary pupils. That will have to be carefully managed but we could talk about how to look after a boy whilst he is here. After all, we are a day school and we can do all we can, but they do go home to very different backgrounds.**

JC: How much disappointment do you generate? How many of your bursary candidates passed the entrance exam but then you could not afford to fund them?

**PB: The best way of thinking about this is by the concept of 'needs-blind'. If we were to take the top 150 from the entrance exam, we ought to have twice as many bursary boys as we do at the moment. At that point, we would be needs-blind. We probably replace 25 bursary boys with 25 fee-paying boys who are, arguably, less able. For years we have known that data, so we need to roughly double what we provide. If we were to get to near enough one in three on bursaries, we'd be pretty much getting to a point where we would be taking equally able fee-paying and bursary boys.**

JC: You mentioned the idea of an evening for bursary boys and their parents and this leads into visibility and awareness. Schools do differ in their attitudes. Some heads say: 'We wouldn't want anybody to find out.' However, elsewhere, schools are pretty transparent - they don't mind and believe it's useful for teachers and pastoral staff to know. What's your position?

**PB: Lots of people have different views. I've edged this part of the school more towards more people knowing who is who. What is really nice is that, walking down the corridor, I can see there is no difference. If you were to paint all bursary boys green, you wouldn't see clumps of green boys all together in the yard. They are well mixed in terms of their friendship groupings. That works for the boys. I can see that attaching a stigma to being a bursary boy would be a bad thing but I don't see that stigma. Boys tend to measure people by their character and what they can do. Can they play an instrument? Can they run fast? Are they clever in class? Are they a decent bloke? I share the information about who's who much more broadly now, than 10 years ago. But they do need looking after. It's all very well having the notion that everyone is equal. We had a bit of a chat about this in a group the other day. Sometimes to make things fair (that's not the same thing as treating everyone the same), fairness requires difference. We need to know – the staff need to know. They leave here every day and they go back to backgrounds which some colleagues could not imagine. They return the next day and we imagine that they've done their homework. We picture a nice study or a desk and it's not like that at all. We have to understand that.**

**The notion that social mobility is difficult is something that I don't see discussed enough. Those schools that have bursary kids in them know very well that making a success of a bursary pupil happens all the time but it is non-trivial. There is a lot that goes in to taking on someone whose aptitude and ability will benefit from the atmosphere in a school like this. It's not just about passing the entrance exam and getting your place. There is a lot of care and attention needed, too.**

JC: Each school has to make a choice about what it is doing with its money. The Manchester Grammar School has a short sliding scale of income, so the funds are directed at boys from poor families. You have made your decision with a longer sliding scale so that boys and girls from middle-income families can benefit.

**PB: What we do has the disadvantage of not having quite as many deep bursaries as we would like. On the other hand, if we want a diverse school, our method delivers that. The governors have to decide what they want to do; what do we think our foundation was for. As it happens, the foundation here was not about poor people, unlike elsewhere. Ours was about educating people in Bolton, which is a slightly different mission. Some of them are squarely for 'poor scholars' but for us, it's giving the nurses and the teachers a chance of sending their children here, if they have decided that this a priority. We put a great deal of time in to devising the bursary scale. There are lots of people in the school right now for whom, in principle, this is not affordable. But they do afford it by making choices. Their car is a bit older, their house smaller, their holidays less expensive. If you are being asked to pay £5,000 for one child after tax from an income of £40k, it can be done, but it does involve a big choice.**

JC: What do you think of recent debate around the concept of a new open access scheme for independent schools?

**PB: If you strip everything else away, it's just a call for a return to the Direct Grant days. We need to say: 'How can we help to be part of the solution?' If you take the premise that there are 7% of students in independent schools, do we really, really believe that dealing with those 7% is going to improve the experience of the 93%? Is it really the case that, if all of those parents were engaged in the state sector, it would make the state sector a better place? I think those parents would be concentrated in 7% of the state schools, which would get better and better, then house prices would go up. That's what we see already.**

JC: And what about the idea that independent schools could make independent education more available by sharing the costs with the state?

**PB: There is only political prejudice standing in its way. It costs the Government nothing if we match fund and we make up the difference.**

**I think it would work really well. I think we'd raise more money from our alumni for this purpose.**

**But as things stand, the great thing about Bolton is that the touch and feel of the governors is, first and foremost, about bursaries. 'Obsessed' may sound a pejorative word but it is towards the top of any agenda, not literally, but in terms of where we**

**are coming from, what matters. They are obsessed by two things: keeping the fee as tight as possible whilst having ‘an offer’, and bursaries. Pretty much nothing else matters. Of course, governors are self-referencing. They gather a group of people around themselves who are similar and I guess they regenerate themselves on the governing body.**

JC: That commitment is also reflected by the fact that the governors allocate funds from the other operations of the school to this purpose.

**PB: Oh yes, without doubt. There is a nursery, the outdoor centre, the coaches, the weddings and the funeral teas. We have pursued every way to make full use of our assets and the surplus from all of these activities goes into bursaries. We also allocate 5% of the school’s income to that purpose. We believe this is money well spent, because the presence of these boys and girls on bursaries benefits the whole school.**

**And the amount of money we are putting into the scheme is increasing. It started at 3.5% years and years ago. When I arrived, it was 4% and now it’s 5%. At the last governors’ meeting, the debate was: ‘Can this increase?’ It wasn’t about: ‘What are we going to do about it?’**

JC: So, that commitment remains rock solid in your governing body. What comes next?

**PB: At the moment, we are raising something like £1m a year but, even if you keep that ticking along, you still get nowhere near our target of one in three quickly enough. There are some governors who think there is a ‘seize the day’ moment coming. If you make the contribution of 5% into 6.5% or 7%, we could have one in three next September. A consequence could be reducing spending on capital projects but we could still have nice buildings. We just might not need to build something for a few years – a matter of timescale rather than not building at all.**

JC: A final question. Your development office is very successful. Why?

**PB: Of course, we are very lucky in the staff we have in the department. Beyond that, the key things for me are:**

- **First, the governors know why they bothered to have a development office.**
- **Second, they understand that it won’t be making them money tomorrow. This is a long-haul game.**
- **Third, they will get nowhere at all unless the heads believe.**

JC: Thank you. This book need not exist. Those three things just need to be written on a piece of paper and put into the hands of every chair of governors and head and we can all go home.

**PB: You’ve got to tell the stories. Laura (the school’s head of development) shuffles people into my room all the time and tells me the story. They want to meet the head. Donors do not wish to talk to anyone else. When they come in here, they say: ‘Last time I was here...,’ or ‘I never came in here...,’ or ‘When I did come in here, I got a fearful rocket...’**

JC: Thanks for not giving me a rocket.

## Laura Firth (LF), head of development

JC: I have already heard that Bolton School was amongst the very first to address the issue that faced all schools as government funding faded away. Can you talk me through the growth in fundraising in the years that followed?

**LF: Initially, it was two recently retired teachers who led the charge. There have been four heads of development before me: two old boys, a former Girls' Division teacher and then my predecessor, Julia Bates, who came into post in 2008. From that point, the development office became fully professionalised, using the internet and social media to enhance and improve communication with alumni.**

JC: Did Leverhulme's support bring with it an endowment, too?

**LF: No, our endowment from Lord Leverhulme was for the school buildings. Over the years, descendants of Lord Leverhulme stayed very involved in the school and both his son and grandson served as the chairman of governors, during two periods spanning the years 1925-1990. During that time, the family often supported capital projects but there was no capital endowed for bursaries. Now, we are very fortunate to receive very generous support annually from The Leverhulme Trust because of our connection with Lord Leverhulme, which we use for sixth form bursaries. To celebrate the foundation's centenary in 2015, they also established a set of scholarships which support bursary recipients going to university.**

JC: You are serving two separate schools and two heads. How does this work?

**LF: Only one development office was established, to fundraise for both schools, but each had their own alumni/alumnae association, which were both very strong in different ways and hugely supportive of the two schools. As the era of professional fundraising developed, the development office took over the management of the databases of both associations, ran all of the alumni events and produced both of the associations' newsletters. Historically, old boys and old girls paid either an annual subscription or a lifetime subscription as they left the divisions, some of which are still received by the associations now. The two associations still exist: they each have committee meetings twice a year and their own president (OBA) and chairman (OGA). We work very closely with the associations – they both still have their own endeavours, which we support them with. We are all pushing towards the same goal.**

JC: What became the main planks in terms of how much money you are raising?

**LF: The foundation of our success has always been major gifts: identifying and cultivating potential major donors, asking them for money and then stewarding them carefully after they have given.**

JC: Before we get into the ingredients for success, can I ask about your own background?

**LF: I joined Bolton School as development manager in 2012 and succeeded Julia as head of development in 2017. Before that, I worked in the development office at**

**Withington Girls' School, which was my first experience of the sector. I moved to Withington believing that the soft skills I had developed in a previous job, particularly relationship-building and communication, would transfer well.**

JC: So what works?

**LF: We have been successful because of major gifts and we have been successful with major gifts because we have asked people for money. If you appoint someone as head of development who likes asking for money and is happy to do it, and if your head and governors demonstrate their belief in the cause, then you'll get money in.**

JC: That all sounds 'bleeding obvious' but lots of heads and schools worry about who makes the ask.

**LF: I don't really understand that worry: somebody has just got to do it. For us, it doesn't tend to be the heads, apart from a few exceptions. They might be present at the meeting when I ask, but they don't tend to do it themselves. It's their job to sell our vision for the bursary fund; if they have articulated that vision clearly and repeatedly, then someone else can ask. It's a baton that is passed, a conversation.**

JC: You have talked about the importance of big donors but big can mean different things at different schools.

**LF: Our major gift thresholds are quite low. We would class someone as a potential major donor if he or she could give £10k outright tomorrow, and we steward someone as a major donor if they have given £5k or more with tailored stewardship to varying degrees. A lot of our success comes from repeat major donors, and I believe that's because we do a good job of stewardship. We have around 80 major donors, by our own definition, with 10 donors who have given over £250k.**

JC: Another issue that troubles people is the need for friend-raising before fundraising. How long does this process take?

**LF: I think that people need to stop trying to find a 'one size fits all' approach. Get out and be nice to people, engage them with the school and see what happens. Some people will take years, some will never give and with some it can happen in months. Of course, there are rules of thumb but that is all they are. Relationships matter most of all.**

JC: So, you are telling me that the best thing is to get out there, whereas development directors too often have other aspects to their remit which can deter them from this. On the other hand, you do have the advantage of working in a school that has more than 20 years of getting the message out. Even so, let's get to the truth: how many meetings do you have?

**LF: In a month I'd be aiming at three or four – one a week – although I don't always achieve that aim!**

JC: I know that you have been engaged for over 20 years in a continuous fundraising process. This is not a campaign with a terminus. However, did you have any campaigns or targets on the way?

**LF: We launched the 100 Campaign for Bursaries around the school's centenary, which aimed to raise £5m in four years for the bursary fund. We had a quiet phase from September 2014 onwards, then launched publicly in May 2015, at a big dinner we held at the school to kick off the centenary celebrations. We achieved the campaign target in August 2018, by the deadline we set.**

JC: So, what has worked well?

**LF: What has worked well for us is the sponsorship of an individual pupil by an individual donor. When we are meeting a potential major donor, we have a card that specifies the different costs of sponsoring or part-sponsoring a pupil and the sponsor can specify the level at which they feel comfortable.**

**We have based all of our major donor stewardship above a certain level around this, and we use this structure to ask donors to continue support. So, if they have supported a sixth form pupil for two years, we ask them if they'd like to sponsor another or if they'd consider a full seven-year bursary. It's very transparent and easy and hugely effective, because you can keep the donor in touch with a human being.**

**We use this structure for charitable trusts, too: currently, two trusts are supporting eight pupils each and another trust has a further three. Combined, there are over 30 pupils being supported by 'named bursaries' using this mechanism.**

JC: And do the sponsors know the pupil or is that confidential?

**LF: It's in the parents' bursary contract that information might be shared with donors. Sometimes the sponsor meets the pupil when they get to the sixth form but mostly I prepare an annual report on their progress for the sponsor.**

JC: Clearly, it's a different challenge raising money for the Girls' Division. What is the balance in terms of fundraising?

**LF: The raw statistics from the 100 Campaign were that the old boys gave 41% of the total amount raised, whereas 7% came from the old girls. But in terms of participation, 38% of those giving were old boys and 28% were old girls. So, we conclude that our old girls are engaged with the school but, as is the inevitable case historically, haven't had the resources to give at the same level as old boys. This is changing over time and engaging with old girls who are potential major donors is an important part of our new fundraising strategy. We find that old girls are often less forthcoming than old boys. Old boys will tell us when they have been given an MBE, for example, whereas someone else tells us when an old girl gets an MBE. We aim to actively engage with old girls and seek them out.**

JC: Obviously, the Leverhulme funding is material to you but there are other trusts, too. Trusts are not that material in fundraising for most schools but they seem to matter to you.

**LF: In the north west, there are several trusts where you have the classic model of a hugely successful businessman-philanthropist, from whom we have been lucky enough to receive generous support. So, yes - trusts matter a great deal to us.**

JC: We all know how much the top of the pyramid of giving matters, but what about lower down, regular giving, phone campaigns?

**LF: We have run phone campaigns in the recent past, in 2012 and 2013, and historically, back in 2008, but it hasn't been a regular thing. The 2012 and 2013 campaigns both worked well and we raised decent sums but since then, we haven't used them again, even though we were in active campaign mode. We had the sense that it wasn't what people wanted to do.**

**On the other hand, we are pretty good at keeping regular donors and then getting them on a stewardship pathway that pushes the gift up. We do a lot of stewardship around 10 and 20-year anniversaries of giving. My personal view is that, for us, our resources are best spent pursuing major gifts rather than on phone campaigns. That said, we (myself, the heads, the governors and the development committee) all agree that we can and should do more to recruit new regular donors in a more structured way.**

JC: I assume that you are continually looking for potential donors as they come over the horizon. How has GDPR affected wealth screening and your way of working?

**LF: Like The Manchester Grammar School, we went for full opt-in consent, so we don't fundraise from someone unless they have opted in to that channel of communication, and we don't email people at all unless we have their consent. It was hard work at the time but I'm happy it was the right decision: we are utterly transparent and, as people know they have given permission, we don't need to be tentative in asking.**

**As for finding new or lost alumni, we try to get them to sign up as soon as we can, get their details on the database and secure their consent. We wouldn't include someone who was a new alumnus in a general appeal mailing for two years from the date they registered – that was our rule long before GDPR came into force. We find with wealth screening that it will tend to be publicly available information anyway, so we don't use external companies for that service. One of our biggest donors came to us through the 2012 telephone campaign. He responded to the pre-call letter and said that he wanted to make a gift. So, we took him out of the call pool and looked after him and he became a very large donor. Our wealth screening had never shown him up, but neither had the wealth screening done by two external companies either.**

JC: You've been talking about what your team does. Could you tell me about that team?

**LF: I am head of development, working four days a week all through the year, and we have a development manager who is full-time all through the year, too. Then we have two alumni and development assistants, one of whom is four days a week, term-time only, and one of whom is full-time all through the year. Finally, we have an old girls' liaison officer who is two days a week, term-time only. Within our workload, we manage all of our alumni social media channels, the newsletters (one for each**

**association twice a year, so four in total) and manage all of the alumni events. Our events calendar is huge, with over 20 events annually. All of the events are joint, apart from the termly lunches at school and the old boys' dinner.**

JC: Clearly your relationship with the two heads is important but clearly your relationship with the governing body matters, too. How does that work?

**LF: We have a development committee, which I report to twice a year. That is a sub-committee of the governing body and the chair of the development committee is an old boy and full member of the governing body. The heads, another governor (also an old boy), the clerk and treasurer and I make up the remainder.**

**Every couple of years, I present to the governors and as with every other sub-committee, the chair of our sub-committee reports back to the governing body every time they meet. I probably see our chairman of governors about once every six weeks and speak with him more, often to pick his brain or discuss any concerns he has. He is an old boy, a former school captain and Direct Grant recipient; his leadership has played a strong part in where we are today in terms of the drive towards bursaries and needs-blind access.**

JC: Have you ever had any urge to have a different committee or wider representation from major donors or the alumni organisations?

**LF: In the quiet phase of the 100 Campaign, we tried to set up what we called the development advisory panel, which was going to be major donors and potential major donors, but that didn't really work as we had hoped.**

JC: What about parental giving?

**LF: We haven't really pursued parents for regular donations. There are parents' associations for each division and in the past few years we have worked closely with them to help them stage two big fundraising balls, from which we've gained a large part of the proceeds: £10k last summer and similar in 2016.**

JC: On the other hand, the school has developed its facilities extensively, so has there been fundraising for capital projects, too?

**LF: We have just kept it simple: we fundraise for bursaries. The school's master plan for buildings, which originated in the 1990s, was funded from the school's surplus and from borrowing. The only exception to that was the recent campaign for the joint sixth form centre: the final piece to the master plan and the only one we have fundraised for. It cost £7m to build, of which we raised half, but it was hard going. We had to raise the money for this building and it was a need, not a want. We did find the donors, a mix of alumni and charitable trusts, but without the lead gifts, we would have failed. In the telephone campaign of 2012, donors were given the chance to give to either the sixth form centre or the bursary fund and, in the main, they chose bursaries. Alumni said: 'Well, I didn't have that and I did fine,' and 'What do you want that for?', whilst parents, who we thought might give, thought that we should pay for it ourselves, too. It was tricky going.**



**Now we have the sixth form centre and it is wonderful. It's a huge selling point for recruitment at Year 7 and Year 12 and as a joint centre, it forms a physical and metaphorical bridge between the two divisions.**

**We did do it, but I am glad not to have to go out for capital again. If someone did want to give for buildings, I am sure we could find a home for the money but we have no plans in that regard. And, personally, I am no fan, either, of paying £50 to buy a brick – it seems such a lot of work for so little return.**

JC: So, if the future does not lie in buying a brick or in bricks and mortar, where does it lie?

**LF: If we were back to one pupil in every three, rather than one in five as we are now, we'd be close to needs-blind access for every deserving child. We want to achieve this in the relatively short term – the actual deadline is still being debated by the governors but 2030 is the year that was originally in my strategy. That success won't just be based on fundraising, but on several other levers that we can pull.**

**It would take us a bursary fund of between £50m and £60m to achieve this aim. We treat our bursary fund as an endowment: the governors are very strict and they decide each year how much of that money is to be distributed with a really tightly controlled formula to preserve the capital of the fund. That's different from other schools where they have gone more to a pay-as-you-go model, where they have to raise £1m a year just to pay the bills.**

JC: I know it well. The other side of the ball is finding the boys and girls to make good use of your bursaries. How do you relate to the admissions bit?

**LF: I don't have any direct involvement in the admissions or the applications process. It is incredibly widely known in the local community that we have a lot of bursaries to give away and we do lots of outreach. The bursary places are incredibly oversubscribed. We had 964 applicants this year for Year 7 entry to the two divisions, of which 273 were applications for bursaries, and that number is growing all the time for both divisions.**

JC: How can more schools like Bolton become better in this area of work?

**LF: They need to make social mobility the focus, like we have at Bolton. Although my dad had a Direct Grant place at a grammar school, I went to a comprehensive school and from there to the University of Manchester. Before I went to work at Withington Girls', I had the sense that independent schools were way outside the realms of possibility for people 'like me'. When I was there, we were fundraising for bursaries and that opened my eyes to the fact that anyone should be able to attend such a school if they are bright enough. I wouldn't work at another school unless bursaries were their priority. It may not be a moral crusade but I do it because I really believe in it.**



## Chapter 4:

# The Manchester Grammar School

### Introduction

*The Manchester Grammar School (MGS) is the largest of the day schools that have played significant roles in the history of the cities they have served. Today, it has over 1,300 boys in the senior school and a further 250 in its junior school. It was founded in 1515 by Hugh Oldham, Bishop of Exeter, a local man whose influence came from his association with Lady Margaret Beaufort, mother of Henry VII and founder of St John's College, Cambridge. Oldham was also associated with the foundation of Corpus Christi College, Oxford, the first college in England to teach Greek, and Brasenose College, Oxford. The school maintained its close links with those colleges for centuries and it maintains its classical heritage in the best of all school mottoes, taken from Horace, 'Sapere aude' – 'Dare to be wise'.*

*Oldham's original intention was to offer 'godliness and good learning' to the poor boys of Manchester and that meant the teaching of Latin and Greek. When the school was founded, Manchester was little more than a village but the school grew in size and reputation, as did the city.*

*The school was originally in the heart of Manchester, close to the cathedral, but in 1931 it moved out, as did many similar schools at this time, to the countryside to provide more space for the school.*

*As with many similar schools, The Manchester Grammar School particularly flourished in the era of the Direct Grant system, which ran from the Education Act of 1944 until its abolition in 1979, and then from the Assisted Places scheme, which ended in 1997. Under those systems, the majority of boys attended the school for free and thereby it became a powerhouse of academic excellence and social mobility. In a good year, 70 boys from MGS would win places at Oxford or Cambridge out of a year group of 200; consequently, more MGS boys would go to Oxford and Cambridge than from almost any other school.*

*JL Paton, MGS's great high master at the beginning of the 20th century, said: "MGS has the proud distinction amongst old foundations of having kept nearer than any other to the intent and spirit of its founder that it should primarily give to boys who had not much financial backing a chance of distinguishing themselves."*

*Christ's Hospital might disagree (see chapter 2) but every head is allowed a certain licence when celebrating their school. However, it is because of this historic purpose that MGS was amongst the first to respond in 1997 to the end of the Government's Assisted Places scheme, which superseded the Direct Grant scheme. That response was to engage in a major fundraising campaign for bursaries, which has had an impact of historic significance on the character and the success of the school. The school remains one of the country's leading schools in terms of its academic performance: 32 boys gained places for Oxford and Cambridge in 2018 and it's an unusual year when it is not the highest performing boys' school north of Oxford.*

*All of this is reflected in the school's aims, which are published on its website:*

*The Manchester Grammar School has a long tradition of educating boys, irrespective of their parents' ability to pay fees.*

*We aim to:*

- educate the brightest young men in the north of England, regardless of their social, cultural, religious and financial background*
- educate our boys and equip them to have the courage to use the understanding they gain from this*
- teach them to think for themselves and to develop a lifelong love of learning*
- know every boy and create an environment in which every boy feels valued as an individual, and is challenged to fulfil his potential, whatever his talents and attributes*
- produce well-rounded young men who have a true sense of service to their communities*
- maintain a vibrant and diverse programme of co-curricular activities which plays a key role in the school, enabling all boys to explore and develop new interests, challenge themselves and take responsibility, develop teamwork and leadership skills, make friends and have fun.*

*Since Martin Stephen, the high master of the time, embarked on this grand project in 1994, the school has raised over £30m. Six hundred pupils have been supported in that time and at the time of this writing, 231 pupils, a sixth of the senior school pupil body, are funded at an average level of 95% assistance. All of the support is funded by external donations made by a total of 2,596 donors, of whom 95% are from the alumni community.*

*MGS now has a substantial development office, but its fundraising has always been an inside job. During the last 20 years, it has had two directors of development, Ian Thorpe and Simon Jones, both of whom are alumni who re-joined the school as teachers. In addition, Martin Boulton, the high master since 2013, came to the school in the sixth form on an Assisted Place between 1984 and 1986; he is the first old boy to be high master in over 500 years.*

**Simon Jones (SJ), development director**

JC: Why do you think that MGS has been so successful in its fundraising?

**SJ: I think there are three factors.**

**The first, and most important, is that this is our core business. We haven't fundraised for bursaries as a response to political change. We have done this because fundamentally, from day one, we have believed that it is right; it is what our school should be. We want bright kids to be able to come here, regardless of their financial background, as has been the case since the school's foundation. It's our lifeblood.**

**The second is down to people. Martin Stephen was very important because he saw the writing on the wall sooner than everyone else. Given his position, and his engagement in education at the highest level, he probably got an inkling of the end of the Government's funding of Assisted Places. That gave him and the school more thinking space. He started as high master in 1994 and his surmaster was Ian Thorpe, a wonderful man and an MGS Direct Grant boy. And Martin Stephen said to him: "You're the Rochdale lad who came on the Direct Grant. How do you feel about taking on the role of appeal director?" He realised that there was talent inside the school to lead this charge and the school invested. Ian was in his 40s and, to start with, he combined the role with being surmaster, the senior deputy, at the same time. It was only in 2004 when there was a fully staffed development office, that he focused solely on fundraising. Ian was director of development for 12 years and I have had the role for eight years. We were both pupils and then teachers at the school. We both have a personal reason to be grateful. My gratitude goes a generation back to my father's Direct Grant place at the school and how that transformed my family's life.**

**Martin Stephen and Ian were driving forces in the early days, managing to secure the support of Prince Charles, who remains to this day patron of the MGS Trust. We are also lucky now to have a high master who is not only an old boy of the school but was a beneficiary of a sixth form bursary.**

**The third reason why we got off to such a good start was because our alumni were angry. There was philanthropy linked to anger.**

JC: They were angry because they thought the school was being taken away from kids like them?

**SJ: Yes. They thought it was totally unjust and unfair. Even to this day, people talk about being angry at the impact of the loss of the Direct Grant and Assisted Places schemes.**

**So, the school bought a car and Ian Thorpe and Martin Stephen would drive through the night, all over the country, seeing people. They worked so hard and each understood what their roles were. Martin was a great speaker and Ian knew everyone. They got out there and met with people as individuals and at small events – two people, four people, 50 people.**

JC: So, from the beginning, this was all very simple. It is all about bursaries, nothing else?

**SJ: Yes – in fact, we have brochures about giving and fee assistance which go back far earlier than the 1990s. Even in the old days, the school ran its own bursary scheme to enhance what was on offer. This wonderful, great school has been held up by philanthropy and it has never had a large endowment from which it could fund bursaries.**

**(Some fundraising has focussed on the buildings. Most notably, when the school moved site in 1931, a large proportion of the building project was paid for by old boys, at a time when MGS was almost bankrupt.)**

**Even so, the school's intentions have always clearly been the same. In 1974, the governors wrote to the parents: "The school's governors have decided that, if the Government Assisted Places is abolished, MGS will carry on its vision as an independent school and will endeavour to find means to support poorer boys."**

JC: If you cast your eye over the span of your fundraising, what have been the different phases and where have the big successes been?

**SJ: The first phase was 1998 to 2005, when we had the massive push to raise the first £10m. Then we had a six-year period during which funds continued to come in because of the groundwork done during that first appeal. We were starting to reap the rewards from people giving annually and legacies coming through. The focus on fundraising then received a boost with the quincentenary celebrations marking our 500th anniversary. Whilst 2015 was the actual anniversary, we used this as the focus in the years leading up to it for a relaunch, with a new campaign and theme – *The Next 500*. As the fundraising graph had risen and we were able to produce a social impact report, this led to further support from alumni. Over time, peer referral has become really important, as has donor recognition and the publishing of the names of our supporters. Our donors have helped us to make links with, and talk to, their peers. There is a real sense of community among our alumni and they are very proud of it.**

JC: With good cause. Of course, the quincentenary has given you a purpose but what have your specific campaign targets been over the last 20 years?

**SJ: The first £10m was a big target. No one else in UK schools had done anything like that before. The school actually thought that it needed more but it was worried that if it set a target that was perceived as being unattainable, people would be less likely to give. £10m was a huge amount of money in the 1990s; however, it turned out that this was the right target because it was achieved. In 2012 we launched *The Next 500* appeal to raise another £10m of income, at a stage when the existing fund was at about £17m.**

JC: So now you've got a long-distance target?

**SJ: Now, with the fund approaching £30m, we've set £50m as our next milestone and we are explaining that we need to raise over £100m to enable us to be truly needs-blind. Our supporters understand that this is going to take decades. However, we are**

**confident that we shall be successful in the long term because of the strength of feeling among our alumni and other donors and the undertakings we are receiving regarding legacy gifts.**

JC: Please explain the development of your development office.

**SJ: The existing department was formally set up in 2004 when Ian Thorpe became the full-time director of development, although we had already been doing development work for a number of years. Typically, a development team will have one member of staff for every 2,000 contacts. We have 11,000 alumni and a staff of 5.5. Part of my time is spent working on other non-development matters in the school. Indeed, this is true of all of the development staff, as their roles integrate with the school in areas such as events, communications, careers education and archives. One of our great successes is that development is integrated into the whole school.**

JC: So, I assume that your donors are largely alumni.

**SJ: Yes, 95% of our giving comes from alumni. When we initially began fundraising from alumni, everything hinged upon personal contacts. We needed a very quick start because the abolition of the Assisted Places scheme presented us with a huge and immediate problem. We admitted 40 boys from September 1998 without knowing how we were going to fund them. We spoke to our alumni and explained what we needed; that was a brave act and the embodiment of the school's motto ('Dare to be wise'). Initially, as with all fundraising campaigns, major giving played its part. As time has progressed and systems have developed, we have become steadily more scientific, more professional and more diverse in our approach, with gifts coming to us in the form of legacies and specified bursary endowment gifts as well as major giving and regular giving.**

JC: Have you used phone campaigns?

**SJ: Yes, twice in the last three years and with great success. Some people think that phone campaigns are dying and that GDPR is an obstacle to contacting alumni. In fact, the response from our alumni has been fantastic: 4,600 of them consented to us contacting them for fundraising purposes. I think that this is a great testimony to their regard for MGS and the strength of the school's relationship with them.**

JC: And what about regular giving?

**SJ: Regular giving is important to us and growing. We openly tell our boys when they leave that we shall not ask them for money until they are 30. Until then, it is our job to help and support them, e.g. with careers advice and small grants to help them to travel abroad. At the age of 30, our young alumni, often irritated by aggressive fundraising approaches from their universities, know that their greatest debt is to MGS and many of them start giving £20 a month.**

JC: So, in the midst of all your success, what are your big issues?

**SJ: What keeps me awake at night is how our bursaries can achieve longevity through the creation of a partial endowment model to protect our funds against the inevitable volatility and unpredictability of the stock market. In the beginning, our approach to bursary fundraising was a matter of living from hand to mouth, 'pay as you go', spending the money we had raised or even, as I have already mentioned, spending money that we hadn't yet raised. People in the late 1990s thought that £10m would solve the problem and that would be the end of it. But, of course, it wasn't.**

**When the economic crash occurred in 2008, we were extremely lucky. The fact that the MGS Trust did not need to sell any devalued assets to fund the ongoing bursary commitment was down to chance; we received, out of the blue, a £3.5m legacy gift. If the school had not received that legacy at that time, things would have been very different.**

**As a fundraiser, it is my job is to make sure that we have income coming in every year, but I am also dependent on the stock market and the impact that can also have on donors. We've now got a separate endowment fund as well as a regular fund, and it's about appealing to different donors. Some want to give to something that is endowed, whilst some want their gift to be spent now, and you need to be able to accommodate both. However, we want the impact of the money we raise to endure for another 500 years. Hence the name of the appeal, *The Next 500*. We are trying to raise as much as we can to fund boys entering MGS today, whilst balancing this with the need to ensure that we can provide the same opportunities for boys in the future. So, we have a long-term plan of transitioning towards a more endowed model, without neglecting boys currently entering the school. And that's a real challenge as well as being a hard balance to strike. Some people knew that we needed to raise more, but we think that we have successfully conveyed the message now, that this is a journey for the long-term.**

JC: I gather that you have done fundraising trips in America. How material has America become?

**SJ: It is said that those who go abroad tend to go to be successful. We currently have 300 alumni in America with whom we are in contact. We now go twice a year and in the last year I have visited alumni in Hong Kong and Australia as well. In America, tax breaks are on our side and some of our American donors are particularly keen on endowment. When we go, we are often invited to stay with donors, which enables them to get to know and understand us, our aims and values, and us to get to know them. On these trips we have received generous gifts from elderly donors as well as from young professionals. The amount raised can be large but may vary over time, inevitably. However, alumni cover the expenses and it is a very good investment of time. Everyone knows why we are there and there is no substitute for seeing people face to face. The head has to be available.**

JC: All the time?

**SJ: When I need him, he's there. I am very lucky as I am given a great deal of autonomy. I am allowed to make my own decisions about where to go and if I say that I need the head there, he'll be there. The head is pivotal.**



JC: How do you go about asking people to give you money?

**SJ: The honest answer is that I don't often need to ask the question directly because people have already decided that they want to give. On a trip, people know what my job is, know I have come a long way and know what we are doing. And they already know our central message: the old Mancunian vision is that the school should become needs-blind. I am delighted when the person I am meeting inserts that statement into the conversation – it means that our message is getting through.**

**This needs-blind vision is embedded in the culture of MGS. It is totally accepted and understood. It would be great to see this become the norm in more schools.**

*Exit Simon Jones*

*Enter Dr Martin Boulton (MB), high master*

JC: Simon and I were just talking about the amount of the head's time fundraising takes. From my experience, these were some of the most exhilarating times in being a head.

**MB: And what better use can there be of a head's time than to help boys from disadvantaged backgrounds get a place at a school like MGS?**

JC: You arrived in 2013 to a development office that was already established and highly effective. From your perspective, what have been the key elements in the narrative of success?

**MB: I think the most important thing is that the whole team really has to believe in what you are doing and this needs to be evident in every conversation you have with alumni. For me, that's easy because I came to MGS as a pupil on an Assisted Place, but I can't imagine why anybody wouldn't see this as a public good and therefore something to believe in.**

**Another element that makes the job easier is the fact that so many of our donors have seen the importance of the role that MGS has played in their own success.**

JC: I have heard it said that former Direct Grant schools need to be getting on with it because the alumni who benefitted from that scheme will soon be gone.

**MB: There is certainly some truth in that. The Assisted Places scheme ended in 1997; before that, vast numbers of pupils from lower-income families benefitted from the very best education available at that time. Many of these former pupils want to give back to ensure young people from backgrounds like their own can still have the same opportunities. Things changed post-1997 and the socio-economic mix of our schools has changed; this is not to say that later alumni do not value bursaries but there are fewer who have directly benefitted.**

JC: Some schools indicate that they find it difficult to find suitable applicants for bursary places.

**MB: I too have heard it said that it is hard to find good pupils to take bursary places but that has never been my experience at MGS. Year after year, we are inundated with bright bursary candidates whose performance in our admissions tests matches that of fee-paying candidates. Based on the most recent years' data, our optimal mix would be half bursary and half fee payers. It is, of course, vital that you build relationships with local primary schools and that the headteachers of those schools are aware that bursaries are available. Independent senior schools spend a great deal of time developing relationships with feeder prep schools and it should be no different when it comes to state primaries.**

JC: At conferences, everyone is always worried about how much of a head's time fundraising takes. Doesn't it get in the way of the rest of your day job?

**MB: A well-run school should not need the head to micro-manage every aspect of the operation; in my opinion, schools are most effective when there is a well-developed team in place and one of the reasons for delegating is to free the head up so that they can devote time to strategic areas such as fundraising. It is important to note that fundraising is one area where it has to be the head; a deputy cannot stand in when it comes to talking to potential donors.**

**With big donors, the time you as a head spend with them and the time they spend talking to boys and staff is all about them deciding whether they trust you to use their money to do what you say you are going to do with it. If a major gift is to be made, the donor has to know their money will be spent wisely and for the purpose they intend.**

JC: How does the head's relationship with the director of development work?

**MB: For me, my relationship with my development director is one of the most important in the school but in our case, it doesn't sit within any formal structure. I don't think there is a day goes by that Simon and I don't have a conversation and he knows that he can walk into my office at any time. Simon's role, with its focus on fundraising and building relationships – which he is brilliant at – is one of the most important roles in the school but quite unlike any other. It is rewarded in line with other members of my senior leadership team and that is the status that should be accorded the job.**

JC: History would relate that not all directors of development are successful either in their job or in working with the head. Have you any helpful thoughts on the topic?

**MB: I have been very fortunate in inheriting one of the very best. Of course, it helps that Simon is an old boy of the school; that's not essential but it does mean that he possesses authenticity, and the authenticity of the person doing the job really matters. If the director of development comes across as 'just another fundraiser', it is less likely to work.**

JC: You also give Simon a lot of autonomy, as he says. And, I imagine, that when Simon goes in to talk to a donor, that donor knows exactly what this is all about.

**MB: Yes. You need to set out your vision; in our case, it is all about social mobility. We tell people that the only way we can achieve our goals is with their help. We explain that we have exhausted all the avenues with government in relation to state funding. We also explain that we can't make our education any cheaper without losing our competitiveness.**

**We have benefitted because this has been the focus of our fundraising for over 20 years. In addition, having a proven track record, both in bursary fundraising and outcomes for pupils, undoubtedly helps. There is an element of success breeding success (although you can never be complacent).**

JC: Could you talk me through the reasons why MGS has targeted its bursary funds to 'poor boys', rather than a wider range?

**MB: We have taken a conscious decision to target our bursaries at low-income families since that is where the education we offer has the scope to enable real social mobility.**

**When the school was founded in 1515, it was tasked with educating 'the poor boys of Manchester in godliness and good learning'; so in one sense, we are just staying true to our founding principles. The more recent history of the school, through the days of the Direct Grant and the Assisted Places schemes, saw vast numbers of boys from some of the poorest areas of the city benefitting from access to the school; so in another sense, this is what we have also done.**

**I would argue that the impact of a full bursary in terms of transforming someone's life is much greater than that of a small reduction in fees for someone who is likely to live in the catchment area of a good state school and have educated parents in professional jobs. That is our decision and our strategy.**

**The only way a parent is going to get financial support at MGS is through a means-tested bursary. Our average bursary covers 93% of the fees.**

JC: Most of your funds go into recruitment at 11+ but you also offer support at sixth form, something of which you were a beneficiary.

**MB: Sixth form entry is a very efficient use of money. It can be easier to spot potential, and there is usually a clearer track record of performance as well as potential; and the boys are also more central to the choice. Sixth form entries also enable you to recycle your money every two years so the number of pupils you can help is higher. However, entry at age 11 obviously allows more time for a boy to receive all the benefits of an MGS education, which can be truly transformational.**

JC: As Simon has described, you have now lifted up your eyes to the hills in terms of looking to the longer future, moving from 'pay as you go' towards endowment.

**MB: We actually have two pots: a high-draw fund and an endowment fund. We set up that endowment fund primarily because a number of donors, particularly in America, indicated that they would only give on this basis; they would rather that their money**

helped boys in perpetuity than be used up in a finite period of time. My own legacy gift will be given on this basis too. I am keen to ensure that the place I had at MGS will be given back in perpetuity.

When the bursary fund was established, it initially had to be 'pay as you go' so it could have an immediate impact. If you have to raise £300k to fund the fees of one boy as endowment, you can't provide many bursaries and it is important in those early years to show the fund is having an impact. In those first few years, the school wanted to provide as many bursaries as possible but even then the fund still grew.

Over the last 20 years, we have spent £20m and now have approaching £30m in the trust. We have stabilised the number of bursaries we offer each year to ensure the fund grows. We want to avoid a situation where a few bad years on the stock market could wipe out our capacity to offer bursaries. The balance between how much is raised and how much is spent is complex and needs careful consideration.

JC: Does Simon come to your governors' meetings?

**MB: Whenever fundraising is a major agenda item. He made the key presentation at a recent governors' away day.**

JC: The staff know that there are in their classrooms more interesting, more diverse, more able pupils because of it.

**MB: Of course. And we've just been left a legacy by a former member of staff who is now on our major donor board. I wonder how many schools have former members of staff who leave money in their will to the school? I know this is in the minds of many of the staff here. It becomes such an integral part of what we are as a school and it is something that staff want to perpetuate. In the end, it has to become so much part of your message that it starts to define what the school is. That's why it works. Everyone knows. Everyone is on message. Every member of staff would be able to tell you about bursaries.**

**In fact, the whole thing does not work unless your governors and all your staff support it. Some of our very talented staff wouldn't be working at MGS if we didn't have this commitment to social mobility. Everyone genuinely cares about this.**

JC: Does Simon speak to the common room and to pupils?

**MB: He delivers one of the keynote speeches to staff when they join the school. He also produces regular newsletters and an annual report, which staff receive.**

**He also talks to all leaving Year 13 boys on the day they go. In fact, he has the last word at our leavers' assembly. I say my piece, then Simon comes on. The last voice they hear is Simon's. He tells them that the school will help them and that, if they are successful in their careers, they should expect to receive a visit from the high master. Of course, lots of the boys here are paying fees but we want them to know that this is a more interesting place because the boy sitting next to them might not be paying fees. Our**

**boys get that. They know that their lives here have been enriched by the diversity of the school community.**

JC: This goes back to the value system of the whole school.

**MB: Our boys and parents would all say that one of the most positive things about the school is the diverse social mix.**

JC: It seems that the real capacity to make a big difference lies in secondary schools but even those schools come with very different histories, circumstances, fee structures. It is a complex picture.

**MB: A spotlight has been placed on the independent sector recently, with talk of abolition, or the imposition of VAT. One of the strongest defences to the attacks on the sector, and on individual schools, is demonstrating the public good which they provide, and the provision of bursaries is one of the most significant ways to achieve this; it also fits with the founding ethos of many schools. Of course, a lot of independent schools operate on very tight financial margins, which would limit their ability to offer large numbers of bursaries; however, some schools might be in a position to move some of the funds they currently use to discount fees for scholars, musicians and sports men and women into transformational bursaries; otherwise, bursaries might be funded from an increase in fees or through fundraising. What we do know from the ISC survey is that there is a large amount of fee remission in the sector, but the question is how we can enable more to go to full-fee bursaries.**

JC: Well, MGS is a monumental testimony to what can be done.



## Chapter 5:

# Latymer Upper School: *Inspiring Minds*

### Introduction

*Latymer Upper School was created by a single act of philanthropy. In 1624, Edward Latymer, a wealthy lawyer and man of property, bequeathed part of this wealth for the clothing and education of 'eight poore boyes' from Hammersmith. Between that date and 1895, Latymer's legacy was used to educate local boys via a foundation school, but in 1895 the trustees decided to establish Latymer Upper School. When it opened on King Street, Hammersmith, it had 106 pupils.*

*Throughout the 20th century, there were various means and mechanisms that enabled the school to be accessible to children from diverse backgrounds. First, there were Latymer Foundation scholarships and scholarships funded by local education authorities. Then in 1944 the school chose to become a Direct Grant school; and from the 1950s to the 1970s, 80% of the pupils were on free places.*

*The end of the Direct Grant scheme forced Latymer Upper into the independent sector so that it could retain its academically selective nature. The Government's Assisted Places scheme, which was introduced in 1981, did still enable the school to provide financial support for one-third of all pupils but, as that support declined, so did the bursary provision. By 1998 there were only two full bursaries available each year funded by the original foundation.*

*The school then set about its efforts to rectify the situation. In 2004, a development office was set up and later, the Inspiring Minds campaign was established. Now there are just under 200 Latymer pupils with bursary support. Of these, 129 receive more than 90% fee remission, with 110 on free places. The school's aim is to be able to fund means-tested bursaries for up to a quarter of all students by 2024, the Foundation's 400th birthday. To do that in a sustainable way, it has a target of raising £40m, half for current bursaries and the other half for endowment. So far, it has raised £26m and last year alone, £5.3m was raised.*

*In February 2018, Latymer Upper School won a triple triumph at the TES Independent Schools Awards. It won the award for independent/state school partnership, for secondary school of the year and for school of the year. The judges summed up the reasons for this award by saying: "Latymer Upper School puts the best possible case for being an independent school in this day and age."*

*The school has also been innovative in curriculum, teaching and learning, as well as in its outstanding work in the local community – not least in its support for that community and education after the Grenfell Tower fire.*

**David Goodhew (DG), head, and Amanda Scott (AS), development director**

JC: What I'd like first of all is a narrative about Latymer Upper's history and the relation of that history to fundraising.

**DG: Edward Latymer's will in 1624 not only set up an educational foundation for eight poor boys in Hammersmith but also for eight poor boys in Edmonton, a parallel foundation. In 1627, Latymer Foundation School opened and it grew over time so that in 1895 there was the foundation of Latymer Upper School. Until that point, the boys left at the age of 13.**

The school then had the same trajectory of many others in the independent sector. In 1944 the governors had to make a decision about where to go and we went for Direct Grant status, whereas Latymer Edmonton took on voluntary aided status, which is why they are still a grammar school and we're not. So, then there was what many alumni view as a 'golden age', the 1940s to the end of the 70s: 80% of the boys here for free.

JC: That's a very high proportion.

**DG: There were lots of local county scholarships and the school was firing on all cylinders, churning out incredible linguists, in particular for Cambridge: e.g. Jerry Roberts who broke the Lorenz Cipher, Hitler's personal communications cipher. And scientists such as professor Richard Perham. His mum worked the ticket booth in the Kensington Odeon. At school, he rowed and excelled in science; he later became professor of biochemistry at Cambridge and master of St John's College (Edward Latymer's old college!). His portrait has pride of place in our entrance foyer because his story is a good exemplum for what a Direct Grant education could do. He then came back and was chair of governors and he was also a legator. So, at every stage of his life, he set the example of the classic Direct Grant boy. I want people to see him as they come in and see that as the model of what can happen.**

Then in 1976, there's the end of Direct Grant. We were major users of the Assisted Places scheme until 1997. We had, I think, the highest or the second highest number of Assisted Place pupils in those years. So, the end of the government's Assisted Places scheme hit us very hard. We got to a situation in 2002 where we had seven free places in the school, one fewer than in 1624.

So, governors at the time, and the incoming head, Peter Winter, were clear that had to change. They set up the development office and off they went. So, from seven free places in 2002 with a fledgling development office, we've grown, so that today we have 1,400 pupils in the school. And, 199 of these pupils are on means-tested bursaries. Of those, 110 are on completely free places.

The next big step was in 2014. We started the quiet phase of a campaign called *Inspiring Minds*. We launched publicly in 2017. That campaign aims to do several things. Firstly, we are looking to double our bursary provision. By 2024, which is our 400th anniversary, we want to be in a position to offer one in four pupils a means-tested bursary. In order to do that, we need to raise £40m. I thought it important to take us back to the original foundation of 1624; to go back in the foundation myth to Aeneas, not Romulus and Remus.



JC: I can see very clearly on your website that you are at £26m now.

**DG: The reason we need £40m goes like this. We have a tiny founding endowment and do not benefit from support from any other institutions (for example, any livery company or the Corporation of London). So, we grew our bursaries between 2002 and 2014 largely through people agreeing to pay two years' worth of fees or five years' worth of fees or seven years' worth of fees – a sponsorship or 'pay as you go' model. That's fine but what it does mean is that all of those bursaries are effectively unsecured and, at any point, events – Brexit, another financial crash – could take these away. They are not secured by endowment. So, what we wanted to do was move towards endowment. That's not easy, unlike in the US where everyone gives for endowment. If you endow a place, you are going to need at least £650k but that place will then exist in perpetuity.**

**The reason we need £40m is because we want £20m to go into the endowment and £20m for effectively sponsoring bursaries in the here and now. Those numbers do it. I came in 2012; in 2014 we had 120 pupils on bursaries. We are now at 200. The *Inspiring Minds* campaign has already raised £26m since 2014 so we are well on track with five years to go. We still have to raise £14m to hit our target. A successful campaign will mean that in 2024, the Foundation will be able to fund bursaries for over 300 of our pupils. Our bursary spend now is £2m a year and by then we will be spending £4m a year on bursaries. The governors have also agreed to put our surplus into a fund that can be used for bursaries and so we may even have tripled the endowment by then.**

**The *Inspiring Minds* campaign has had three phases, as is normal, and it is important to get the tempo right. We had a quiet phase, then the launch – aiming at getting to £25m by 2020 – and then we will have the final push towards £40m. Before this campaign, the average amount of money raised each year was £2.5m but in the year of the launch, we raised £8m. It is also important not only to get the tempo right but also the timing. For example, when we were starting the *Inspiring Minds* campaign, we needed to be sure that there was a proper gap in time between the fundraising for the sports centre project, which was being completed as I arrived, and the bursary campaign.**

JC: Can I ask some mechanistic questions about the here and now, your level of admissions, your fees, your annual surplus?

**DG: This year, we are looking to recruit 120 pupils into Year 7 and we have had 1,500 applications, but 500 of those are for bursaries. Our fees are £20,000 a year and our cash surplus is £1.5m a year. So, all things being equal, that money will sit in a reserve fund and, as long as there is not a rainy day, it will be there to fund bursaries.**

JC: You've talked about 'pay as you go' and the need to move to endowment. Could you talk a bit more about that, the original reasons and the reasons for change?

**DG: If you need to grow and change quickly, 'pay as you go' is the only route, with individuals funding pupils. That is certainly the right decision and it is what we did in 2002. However, as time goes by, you need to move to a different model. Of course, the**

**London context is very unusual. Day school fees are high and we have parents who are funding pupils through, as well as alumni. We have some wonderful alumni supporters. If my memory serves me, we have raised £37m for bursaries and a couple of capital projects along the way. So, probably it's fair to say that, in total, our school community has raised £45m.**

JC: Since this is all so, tell me the secrets of your success?

**DG: The key thing is authenticity. You cannot do this if it is not authentic to your school. If it doesn't resonate with your alumni, or your parents or your pupils, it won't work.**

**For example, we have a campaign website. We spent three years working on every single word, on how the message was going to be articulated and whether the targets were realistic.**

**Obviously, it resonates for the alumni. It's the school that they remember because pre-1976, and indeed pre-1997, the school had lots of pupils on bursaries. So, of course, they get that. They are pleased the school is doing that. When they come back, it can be disconcerting to see a much-changed school, with impressive facilities. They know we are very oversubscribed and some worry that they wouldn't get in now because they wouldn't be clever enough or that their children wouldn't get in. So, for them, the fact that the school is saying: "Some things change but some things stay the same, such as access," is really important to them.**

**So, secondly, why are the pupils behind it? After all, we have a pupil-led bursary club, called RAISE, and they do amazingly well. They raised over £18,000 last year and the pupils all think this is exactly the kind of thing that we should be doing; it's the kind of school they want to go to. And, as for the parents, they want to send their children to a school that is inclusive, grounded and in touch with the real world, as opposed to a super-selective, isolated, privileged, gated bubble. And the reasons the parents support it is because we say: "This will make the school more diverse and inclusive," and they say: "Yes, that's the kind of school we want." We do have some globally wealthy parents but they do not want their children to grow up with a silver spoon in their mouth.**

JC: That is certainly true elsewhere as parental surveys show. If I am a fee-paying parent, I am delighted that able kids from a wide range of backgrounds are in the school.

**DG: So, we get buy-in from parents, alumni and pupils – and we shouldn't forget staff. At the launch of the *Inspiring Minds* campaign, I have never seen a reaction like it. We launched it to the pupils first and the staff were entirely behind it. This is also a factor in recruiting and retaining teachers. We have had people who have turned down other schools to come here because they believe in what we are doing.**

JC: And the classroom is more fun and more diverse and the teachers appreciate that.

**DG: So, there is the authenticity and the buy-in that flows from that. That's powerful. But also there is the thinking about why you are doing this and the benefit to the country in terms of social mobility. That ties into other things that we do. Last year,**

**we were short-listed in two categories for the Social Mobility Awards. They came to us and said that we should enter. We were the only school. The acknowledged attainment gap between the brightest 15-year-olds from poor backgrounds and the brightest 15-year-olds from wealthy backgrounds is about two years. It hasn't changed over time. There is also a properly evidenced fact that independent schools add, on average, the equivalent of two years academic growth plus all the soft skills. If you put those two facts together, independent schools could be the solution to closing the gap.**

**The third element, which can be very powerful, is the personal story of the head or the development director and the extent that this project really matters to them. If you are going to persuade someone to buy in to what you are trying to do, they can smell somebody who is pretending. Journalists and politicians and even the public are very cynical about why schools are doing this kind of thing. They say it's all about charitable status, etc. I was educated in a comprehensive school. I was brought up in this area. I was born in Hammersmith Hospital to a working-class family. I couldn't come to Latymer because I thought it was a school for posh people, not like me. I am determined to do it and people can tell the difference. Donors, parents know whether it matters to you personally.**

**In the end, it's about having people who care and it's about taking the time to do things properly because it matters to them and to the school. You can't bolt this stuff on.**

JC: Can I turn from the big ideas to the machinery: the size of your team and the tactics of fundraising?

**DG: We have a team of eight, led by an incredible development director. In the beginning, they were a team of two or three and there was a lot work to be done in mundane things: data-cleansing, getting new systems in place. Our development director did not come from the world of development, but from the world of finance. That was quite a good thing. She had exactly the right approach to how this was going to work. For example, her stewarding of major donors is peerless. She had the right skill set, even if she didn't have the right experience.**

**So, how do we do it? We have several different streams of donations. So, there is an annual bursaries appeal, mass participation. That brings in a regular half a million. That is lots and lots of people who might be giving £5 or £10 a month, either by direct debit or by buying a ticket to an event we are running, such as a talk by an alumnus. So, that's the base of your pyramid and it brings in as much as running an international school.**

**Then, above that, there are people who are giving what might be called leadership gifts, the middle tier. They might be doing £10k up to £50k or seeing a pupil through five or seven years. That is obviously a different beast. And then, at the top, you've got some incredible major donors who make those game-changing gifts. And, as everyone knows, 95% of your money comes from these donors but they won't do it unless there is that pyramid below them.**

JC: And are phone campaigns a part of all this?

**DG: We were very nervous about doing a phone campaign. We've done one and we plan to do another one before the end of the campaign in 2024. It was really successful and it helped us to reconnect with a large number of alumni. So, we will definitely do it again.**

JC: So, after all this activity, where does the money come from?

**DG: I reckon that 55% of our donors are parents, 45% alumni but, since the parents are giving larger gifts in general, they provide 80% of the total funds raised. We are fortunate in that we do have an affluent parent and alumni body – of course, not all of the parents are affluent since some are recipients of bursary support. This does mean that we can raise big sums. We managed to raise £2m in one night at the campaign's inaugural gala dinner, although that cannot be described as normal! One thing that undoubtedly does work is the device of matched funding. When it comes to actually asking for money, of course the development director makes the initial contacts and follows up on events but she also knows when and how to make use of me.**

JC: You have just mentioned your role. What are the demands on your own time and how do you feel about that?

**DG: There are heads who feel uncomfortable with this or who don't see it as their job, and you have development directors who don't get to see the head or who are not on the senior team. If that is so, it's never going to work. It has to be central. My personal assistant comes in apologetically with a pile of thank you letters to be signed and I am delighted. I'd do this all day long.**

JC: Could you talk me through the Campaign Board, its purpose and its structure?

**DG: When we put the Campaign Board together, we had to get the right people. There were certain key people we had to get involved first. We knew they would bring other people with them but their buy-in was crucial to show the wider community that this has real backing. The Campaign Board helps with strategic advice on the campaign. They have personally made significant gifts and they assist with things such as hosting dinners. This provides an opportunity to talk to small groups of potential donors about our vision, enlist support, gather feedback and create advocacy.**

JC: Where does your money go? Do you have a separate trust for it?

**DG: It's a bit complicated, but essentially yes – our endowed bursary funds are invested in the name of the Latymer Foundation of Hammersmith.**

JC: We all know that you can't do anything without raising the substantial funds you are talking about, but how do you attract the pupils to take advantage of this opportunity?

**DG: This is vital and that is why we have a very extensive outreach programme working with 50 local schools, in addition to our work with organisations such as**

**Generating Genius.** We have 1,500 applicants from 77 feeder schools, of which about half are independent junior schools and half are state junior schools. Of those 1,500 applicants, between 300 and 500 are bursary applicants. So we are getting our message out and attracting a lot of very good candidates.

I have just appointed a new director of outreach and we aim to bring all aspects of what we are doing closer together, not least because we are going to have a growing number of bursaries available. One thing we have found is that teachers at the state schools are not, as some have suggested, hostile to our approaches. They, too, want to raise aspirations and are ambitious for their pupils, so that is very helpful. The availability of bursaries is, in fact, aligned with the other things that we are trying to do.

However, there is a problem in generating high demand for bursaries because you potentially generate disappointment. You end up with more bursary candidates passing your exam than can be funded so you do end up sending sad letters: "Your son has passed to get in but we haven't got the funds to support him." These letters will only disappear if we become fully needs-blind and, at Latymer, that would probably involve funding 50% of the students and that's going to need an endowment of £400m.

JC: Your marketing material has a strong sense of history in it and I assume that is important to you and the way in which you relate to alumni and the current school community.

**DG:** There is a balance to be struck. Our parents and pupils don't much like something that is too much to do with heritage and 'posh' schools. However, by saying to them that the school was founded as an act of philanthropy for eight poor boys in Hammersmith, you can also say that this was the original social mobility school. That's a very modern message. By connecting them with the values of that time, we are going 'back to the future'.

Then stuff emerges which people hadn't noticed. Ironically, the land I grew up on – my tower block was opposite Grenfell Tower – was called Freston Road and it was named after the Latymer estates in Ipswich. This land was part of the bequest that set up the foundation school in 1627.

JC: And there is a Latimer [sic] Road Station.

**DG:** The sense of continuity matters. As I said earlier, some stuff changes, some stuff stays the same. And there is a lot to be gained by saying that we are making the school the best and truest version of itself. We are not trying to turn it into something that it never was and we are not trying to turn the clock back. Just the best and truest version of itself.

JC: Well, there you have it.

## A codicil with the development director, Amanda Scott (AS)

**AS:** This is a very exciting job because you are doing something that matters and makes a difference and dealing with a very wide range of people. It is not just our alumni who generously support our bursary programme, but also the parents of our current students. It is striking that some of our most affluent parents are particularly supportive of bursaries precisely because they want their sons and daughters to grow up amongst a wider range of contingencies.

And, inside the school, we continually strive to emphasise that diversity, and celebrate it.

**DG:** The key message I give out, time and again, in open days and elsewhere, is that we are a bursary school, that this lies at the heart of everything we do. It is vital that message is clear both to parents who can afford the fees and those who can't.

**AS:** As a development director for 10 years, I do worry about how new development directors are sometimes treated. Too often a development director is hired by a school, given a target and then left/told to get on with it. It's just not that simple. It takes time for a development director to get embedded and for a case for support to get embedded. It takes time to form relationships, not only with potential donors but with the whole of the school community, starting with the pupils. The development director needs to be visible with and accepted by governors and the staff, so it is really important to be able to be a member of the SMT, and to attend governors' meetings and common room meetings.

And, once you have your office underway and a group of donors, you have to work very hard to ensure that you are stewarding those donors. There is a need for regular contact for example, reporting back to those who are sponsoring students about their progress. It is also important to be transparent with donors about what is going on. Not everything turns out well and honesty helps. It is also important to know your donors well enough to be able to match them with certain needs or certain aspects of school life. A development director needs to have a sense that one idea, or one student, or one situation is particularly appropriate for a particular donor. That can often lead to some particularly rewarding and satisfying links.

**JC:** Could you describe the progress of development and fundraising during your time at Latymer?

**AS:** Latymer's development office was set up in 2004 thanks to the encouragement of the then chair of governors, who had been master of St. John's, Cambridge, where he had seen the many benefits of a well-run development function. Peter Winter, who was head at LUS at the time, was fully supportive of the new office and an experienced fundraiser was hired to ensure that the right organisational structure was put in place to enable success. A donor funded the purchase of a new database and paid for a researcher to work for a year to populate it. The new director of development was a member of the senior management team (SMT) and worked closely with Peter Winter and the governors to establish the credibility of the development office. In their first year, £102,000 was raised from 15 donors.

**A sensitive approach and finely tuned communications meant that after 10 years, some £19m had been raised for the Latymer Foundation and in 2013/14 the annual donor base had grown to over 1,200.**

**One of the key reasons for success in fundraising is, I believe, the longevity of the director of development and their position as a respected member of the SMT. It takes a while to get to know the school community and to earn the trust of donors and staff alike. I have been at Latymer for some 10 years now and it was the in-depth knowledge that I have gained of the school community during that time that in 2014 gave the head and me the confidence to pitch a £40m campaign to our governors.**

JC: What have been the keys to success during your time?

**AS: Membership of our SMT; a close working relationship with the head, the governors, our finance director and our director of admissions; the financial freedom to expand my team as the workload increased (we are eight full-time members of staff, plus two former teachers as consultants and a gap year student); a fantastic development committee with some very longstanding volunteers.**

JC: How do you and David work together and how do you fit into the executive and governance structures?

**AS: I work very closely with David and am a member of our SMT. I attend and tender a report to all full governors' meetings as well as the finance and general purposes and the communications committee.**

JC: What is the structure of your team?

**AS: I have a full-time executive assistant and a deputy director of development who report to me. Our alumni relations manager, our appeals manager and our events manager all report to my deputy director of development. We also have a full-time finance and database officer and a communications and alumni relations officer. Two longstanding and now retired members of the teaching staff work as consultants as and when needed, and for two terms each year we have a former (gap year) student who provides general office support.**

JC: What are the factors that can cause a development office to fail or just tread water?

**AS: Firstly, if governors and the head think negatively of fundraising and feel it's in some way inappropriate for their school. In reality, fundraising allows your school to be the best version of itself by inviting the philanthropic support of your community to provide for areas of school life which fee income alone won't cover. If the head and governors don't openly support the development office by attending events, offering to meet donors and including the director of development at a high strategic level, then the school community won't engage with the development office either.**

**Development offices always fail when they aren't given adequate resources in the early days. Costs may exceed donation income for the first year or two of a development office, especially if the school hasn't engaged effectively with its alumni in the past. However, without sufficient initial investment in a database and in personnel, even the best development director would be hard pressed to be successful. Without the resources and management backing necessary to succeed, the director of development may only stay a couple of years, and it has been proven that donation income rises in correlation with the length of time that the director of development has been in post.**



## Chapter 6:

# Reigate Grammar School: *Changing Lives*

### Introduction

*Reigate Grammar School was founded in 1675 on land purchased by the people of Reigate. The funds came from a charitable gift in the will of Henry Smith, who was an alderman of the City and a salt merchant, as well as funds from other local people. The numbers in the school at that time were very small. There is evidence that in 1685 there were only "four poor boys", although, even then, there were also fee-paying pupils who the master would also have taught a broader curriculum, some of whom would have been boarders.*

*All the way up to the Butler Education Act of 1944, it was an independent school but from then until 1976 it became a Direct Grant school under the control of Surrey County Council. As the Direct Grant scheme came to an end, the school returned to its independent status. At the same time, the sixth form of the school became co-educational and it became fully co-educational in 1993.*

*In recent decades, the school has taken on two junior schools so that it now operates on three sites and educates 1,500 pupils aged from three to 18.*

*The tale of Alderman Smith shows that Reigate Grammar School is not a school with a substantial endowment for bursary provision. In January 2014, the school launched the Changing Lives social mobility campaign at the Mansion House. Since that time, the school has raised £8m and there are over 170 students receiving means-tested fee remission through the school. Of these, 60 children are on full bursarial support.*

*The school is also developing income streams through sponsorships, international partnerships and in other ways. The commitment to bursaries and social mobility is deep rooted from the governing body to the student-run charity committee and individual students raising money for the Changing Lives campaign.*

*Even after all that, the largest contribution to the issue of social mobility may lie in one of the school's alumni, Sir Peter Lampl, who attended the school for free in the years of the Direct Grant system. He and the Sutton Trust, which he created, have been central to raising and addressing the issue of accessibility in Britain's education system.*

**Shaun Fenton (SF), headmaster, and Sean Davey (SD), head of foundation**

JC: Shaun, you run a school that has an explicit moral purpose and has a historic purpose. Where do you think schools like this are in relation to the issue of accessibility?

**SF: I think we are best placed when this is approached from a position of values. These schools are at their best when they are not thinking about this month's political announcements, what the Charity Commission might have put out in a memo or what might have been written in a new book. We are at our best when we reflect on our values. I've been the head of two state schools and now an independent school. I think that there are distinct opportunities for the independent sector to work in partnership. In the independent sector, the only way to be, the only way to succeed, is to be values-led and to do good work in the way that we educate children, the way we prepare them to do good in the world and the way we run our schools, away from news stories.**

JC: What do you think of the sector's response to the issue of bursaries?

**SF: I believe that bursary places are vital. Each one can change the life chances of a young person and of their family for future generations. There is nothing more important in our schools. I am committed to a wide range of significant initiatives to grow bursaries and I have been inspired by how many headteachers share that determination to help social justice.**

**Our schools have been and are committed to bursary places. We are all in different places but there is agreement that this is a very important issue. Some independent schools started this with ancient foundations, some with Victorian philanthropic donations and there are others which have found this as a way to express their moral purpose more recently. Remember, many of the independent day schools were until recently in their history, funded or part-funded by the state, so there was no need for bursaries because they didn't charge fees or they had significant access schemes already in place.**

JC: I accept that the Government has in the past funded places in our schools and that it seems a good idea. However, at the moment, it isn't happening. Surely it will never happen again in this country?

**SF: It would be great to create more places in good schools in our communities. Independent schools want to be open and accessible and have offered up to 10,000 bursary places a year on a partnership scheme with the Government. Independent schools should help fund the places but I feel that educational opportunity for the most vulnerable in our society should also be at least part-funded as a public good.**

**Some may take the view that because it isn't currently in a manifesto, then we should give up. There are countries around the world where a mixed model of funding continues to flourish. Why not here? I think we should be campaigning for the idea as it is a way to help so many children access a better education.**

**We'd be delighted to take in lots more bursary-funded places, and so would many independent schools, if only we could have the same level of funding as the local comprehensives, targeted at children qualifying for free school meals. Why should this school not offer such places?**

**Across the sector, we are offering places at a lower cost to the Exchequer than funding a place at a local state school – places targeted at those most in need in our society who could then have the option of attending an excellent independent school. We would also agree that these places would not need to be academically highly selective; most ISC schools are not academically selective and therefore pupils would only need to meet the standard required by a receiving school. You would have to be against social mobility or against value for money to oppose this proposal. So, of course, the reason why I think that there is a likelihood of it happening is because it's a compelling idea that would help children. In politics, things can change quickly. So I don't think that we should be trying to predict what the next political decade is going to be like.**

JC: You clearly see a wider perspective whilst being the head of a school. How does that big picture work at Reigate?

**SF: Bursary fundraising is a key part of our ethos at Reigate Grammar School. We have taken a long-term view as we want to become needs-blind in the future. We are committing resources now to engage with our alumni and parental community to create a culture of giving and support. We work with today's students in school to help them see the benefits of bursaries so that they will feel encouraged to support bursary fundraising in the future. We are developing overseas schools where the income returning to the UK will help support our commitment to bursaries.**

JC: I can see the merits of some sort of social contract and important campaigners such as Sir Peter Lampl of the Sutton Trust, one of Reigate's own products, who have also argued for some form of help to fund bursary places. However, how do you see the sector's efforts in this area?

**SF: The trouble with the Twitter era is that discussion becomes a polemic. You're either a demon or an angel. The truth is usually more nuanced than that and, on balance, I believe that the sector is making a bigger contribution to public benefit than ever before. Every independent school that I know of is working hard across a range of projects.**

**Independent schools have bursaries and state school partnerships: they support community groups, offer thousands of hours of volunteering, run sports partnerships, give academic support, provide governors, loan buses, provide free use of facilities, help with university applications, employ lots of people, and add cultural, educational and sporting value to the local community. Associations such as HMC have campaigned for fair outcomes in examinations on behalf of children in all schools. We train new teachers, we help keep some minority subjects alive when numbers have dwindled in the state sector, we have campaigned on mental health issues. We add value in a range of ways to education and to the local and national community, and if we weren't there, it wouldn't make things better.**

**Each school will have a different emphasis and bursaries will also be part of a bigger picture in terms of the growing commitment to partnership and public benefit that I see across the sector.**

JC: I see that there is a lot of value added in a range of areas. On the specific area of bursaries, how does this work tie into your historic purpose?

**SF: At Reigate Grammar School, we were founded to offer four free places to ‘poor boys’. We now offer over 170 means-tested bursaries and can do so because we are a larger school now. We are also a much better school than in past decades and centuries so that the children attending get a much better education than ever before.**

**We have also scaled up the economic and social capital that we generate now to have a much more positive impact on the community than if we were only educating a few pupils. For example, we don’t only offer school places to children from less-advantaged backgrounds. We also employ people here from disadvantaged communities. That shouldn’t be overlooked as a means of adding value, of providing public benefit.**

**We add value through contributing social capital. That isn’t just about finding a boy or a girl who could not otherwise come to the school and giving them a place. When we educated four poor boys, we probably employed one person. We now employ 350 people and have 450 contracts and we are part of a multimillion-pound business. Lots of families rely on the employment we offer, lots of mortgages are paid, lots of people’s lives are enriched because we are a bigger school than we once were. If we were just four boys in the parish, we wouldn’t have that impact.**

**The values question is: “How are we doing good?” I am pleased to be part of an independent sector that is doing more and more every year – more bursaries and more in a whole raft of important other outreach, engagement and partnership projects with schools and the wider community.**

JC: Aren’t bursaries the most important thing schools should be doing?

**SF: I was at the HMC conference a few years ago when Chris Ray, ex-head of Manchester Grammar School, stood up, in the face of similar criticism and listed 200 community projects. He said: “Are you telling me that all of these are counted as zero value and the only thing that matters is bursaries?” It seems to me that the person responsible for the criticism then realised that bursaries should not be the only metric of public benefit and that is as true now as it was then.**

JC: Should schools raise more funds for more bursary places?

**SF: Schools are ramping up their fundraising teams and that is important. I would encourage all schools to engage in relationship-based fundraising with the wider school community. The benefits are manifold and far more than simply those of increased fundraising.**

**We held a major HMC Conference in my time as chair to help share best practice and as a call to arms to all in the sector and there will be another event, jointly with IDPE, in early 2020 – the School Bursaries Conference. We are doing more than ever before and we can do more still in the areas of bursaries, partnerships and community engagement.**

**So, when it comes to bursary funding and accessibility, many of the best independent schools have some consistent stories around it being part of their ethos, part of their understanding of what makes a good school community, a diverse school community.**

**About fundraising, there are a couple of things I would say. I don't know if, starting now, whether it's even sensible to try to replicate what a few schools did in the last 150 years where they established big endowments and lived off the income. So, one of the things that I am encouraging people in the sector to do is to think what a sustainable income model should be in the 21<sup>st</sup> century to fund increased accessibility. I think that for many it needs to be about a business model rather than looking to create a big fund in the bank and taking out 3% a year. How do schools generate business? Well, they have to use what they have of value. That's educational capital. That might include the international schools programme or perhaps the use of IP in new technologies. There are two specific ways in which I can see a huge growth. At RGS, we are not unusual in going overseas to generate additional income streams from this and related activities, such as teacher training, and this money will come back into the UK schools to serve our values-led purpose, which absolutely includes providing bursary places in the school.**

**We have to be careful because there is a lot of excellent state-sector provision. The big social justice issue in our country isn't the difference between the independent sector and the best state schools. It's the difference between the most successful schools, state and independent, and the least successful schools. We do need to be careful with the notion that if they go to an independent school rather than a state school, it's a win for the child. If they go to a great school rather than one that would not have served their interests, then it's a win for the child. Independent schools can and should be part of the solution but cannot solve social mobility alone.**

JC: What is the international plan?

**SF: We have plans for 10 schools. If we have 10 schools running on the business plan we have agreed, then we will raise almost as much from this exercise as from fee income. We could be needs-blind way before we even get to that point. It will be a serious proposition in a generation's time. Why wouldn't we?**

**We need to do more than just go to alumni and ask them to make a donation. We need to diversify. And that is quite challenging. But there is a huge, almost insatiable, international market for the qualities and characteristics of independent schools. And the minute we harness the potential of new technologies, that income growth will be exponentially larger.**

**What I have learned about fundraising through a development office is that it only works through a relationships-based approach and that, therefore, takes time. The big threat to development offices is that they need to be seen as a five to 10-year cycle rather than having a focus on the first 18 months. A problem for the independent sector is that not many schools have the financial comfort that allows them to take that long-term view. It is hard to say: "I'll invest £1.5m before I see a return." They haven't got that spare investment.**

**A couple of final points. I don't think that one should undervalue bursaries as enabling kids to come who would not otherwise be able to afford it. By that I mean not just 100% bursaries. We have a model in our schools that they are run at different price points. We use bursary funds to help parents earning an average wage, so we sometimes pay 50% of their fees. There are people who would say that doesn't count. They might say that the children of middle-class families shouldn't get help. I think we should help *all* children get a great education.**

**There are different, legitimate models, whether your fee assistance programme is just for the most needy or for a wider band of the population. There is a danger that in the current climate, only 100% bursaries count. Remember when the squeezed middle mattered and the just-about-managing were seen as important? Well, for RGS that wasn't just a political soundbite. There are people who are just about managing and I am pleased to be helping those families too.**

**In my experience, one of the most powerful things in motivating people to do good is to see the examples and to celebrate them. The charity committee at Reigate Grammar School chose for one of its chosen charities this year our *Changing Lives* bursary fund. They do lots of other charities. And there are children in the school who stand up in the school and say to their peers: "I'm here because I am on a bursary." I've been talking to our fundraisers, recent leavers; there are students who were dependent on food parcels. We've got some remarkable stories and those stories aren't just stories; they are people's lives.**

*Sean Davey and John Cloughton move to the foundation office.*

JC: In the introduction, I have covered the school's history since its foundation in 1675. I'd like some more detail on what might be described as modern history, the last 50 years.

**SD: After the end of the Direct Grant scheme, the big decision in the early 1970s was whether to close, as was the wish of Surrey County Council – and that would have meant we would have perhaps become a Tesco's car park – or take the bold step to remain open and return to independent governance. So, in 1975, Reigate Grammar School like many other schools became independent once more, introduced girls to the sixth form (girls entered the school from 11+ in 1993) and benefitted for a number of years from the Assisted Places scheme introduced in 1980.**

**During this transition, there was some fundraising for capital projects for the school to survive and modernise, particularly as Surrey County Council had not invested in the school campus for many years. Significantly, a number of key gifts came from the**

**local community, highlighting the strong links and bonds the school has with the town of Reigate.**

**The Assisted Places scheme ended in 1997 and, as a result of growing need, the headmaster of the time, David Thomas, established the Reigate Grammar School Foundation (2003) to build community links and, ultimately, raise funds for bursaries. David Thomas appreciated the need for engagement and for building trust. The foundation in its early years was essentially alumni relations and gentle engagement with some donations achieved, though small. Any developments in terms of facilities and fee support came out of the operating budget.**

JC: So, how do Reigate and Sean Davey come together?

**SD: Then, the headmaster and governors identified the need to take fundraising operations and development activities to a higher level. That's no disrespect to the person, a teacher, who had one period a week allocated to oversee the operation!**

**I was working at Christ's Hospital at the time, involved there with development and community engagement activities. I know the Christ's Hospital model well, the importance and impact of bursaries, and it is something I am very passionate about from my own experience and background. I was born in Ashington. Currently, my home town suffers a child poverty rate of 30% and 38% unemployment. My father was a coal miner. My grandfather was a coal miner. I was lucky enough to go to the local grammar school. I was the first in my family to go to university. For me, education was everything, the key. I felt particularly lucky. So, there are personal elements in play: perseverance, passion, the drive and the need to make a difference. It was a fundamental reason for accepting the position.**

JC: So, what was your key focus when you arrived?

**SD: From the very beginning, this was not just a fundraising strategy. It was a relationship strategy. At the start, there were two issues which are common to many schools. The first is the relationship with the existing old boys'/girls' association. There is often a lack of a shared vision and collaboration. The Old Reigatian Association was dying on its feet, so it was very clear that we had to work together. We took in-house all the organisation, the database and the engagement programme, which was very limited at the time, with a few random reunions but very little beyond. The second was the scale of contact with our alumni. When I started in 2010, we estimated, from school records, that there were about 8,000 to 8,500 living former pupils, yet we had only 1,700 with whom we were in contact. We were making the change with the Old Reigatian Association, so that presented me with the opportunity to write to say that there was now no need to pay any subscription anymore, the princely sum of £6 a year. However, if they wanted to make that as a donation to our bursary programme, they could do so. About 90% said they would with many upgrading their contribution.**

**It became a key strategic objective to improve connectivity and engagement. What we now have is an engaged community and professional network. It has taken years but is a really important feature of our progress. If you really want your school community to be inclusive, then you need to involve all stakeholders. This community**

is now wider than alumni – we don't even use the term alumni or 'Old' Reigatian. Everyone is a Reigatian, of Reigate and Reigate Grammar School. It's current and former pupils, parents, friends, even people who have nothing directly to do with the school but support our ethos.

Every school has a community, although that may differ from school to school. For us here in Reigate town and hinterland, we have an association going back nearly 350 years. So, one of our key objectives was to engage with that community as well as conveying our moral purpose message. So, after all that, we now have a database/Reigatian community of over 15,000 people. That's a long way from the 1,700 alumni names with which we started.

We exist to develop and support our Reigatian community and build support for bursaries, dealing with the local challenge of social mobility. We believe that tackling social mobility through educational provision is a worthy aim and appropriate to us. It's in our DNA.

We welcome all new parents and make them feel part of the wider school community. It is also a big selling point that we have such a well-developed global community. Lots of work experience, talks about careers. The professional network has 3,000 members. Many of our parents are self-made and appreciate our social mobility message and engage positively with our work.

JC: Could you explain to me the local context in which the school works?

**SD: Local to us, we have several estates with high levels of child poverty and social deprivation. Crawley, for example, is within our catchment area and is placed sixth in the country for levels of child poverty and deprivation. Schools can utilise the data that already exists from different organisations – the Sutton Trust, social services, local charity groups, local borough and county councils and housing associations – to identify key areas. Then you can build links with local primary schools, church organisations, etc. Of course, this should all align to one's outreach programme. There is the danger of focussing on fundraising alone and not establishing or developing the outreach work.**

JC: Your emphasis on the role of the wider community is very striking and, as so often, it reflects the particular context and history of your school. What else matters?

**SD: We have to believe in what we are doing and convey that it is central to our moral purpose and existence. Social mobility, educational opportunity for the disadvantaged, is one of the most important charitable issues we face. If you are going to stand up in front of people and promote your cause, then you will be challenged about it. So, the question was: "How do we articulate that passion, our noble purpose, and what we are actually trying to achieve?"**

JC: So, how did you answer that question?



**SD: In my first year, 2010, I focussed on review, audit and strategy, whilst developing an engagement programme. These generated ideas and underpinned the initial *Changing Lives* campaign strategy with branding, key messages, publications and communications.**

**Shaun arrived in 2012 and that gave us a new momentum. At the early stages, we needed to engage the governing body and involve key people. It's a matter of going to the senior leaders of the school, the governors, and saying: "What do you really want from this school?" You need to be clear. If bursaries, and open access and helping poor children are not on the agenda, then say so. But if it is and it links to the ethos of the school, then we can drive it.**

**Now, things are different. The chair of governors and the headmaster come to me with ideas about people whom we might bring on board so that's great progress. We are getting like-minded and empathetic people on the board, talented people who share our passion for social mobility and offer support and creative ideas. One of the biggest drivers is the vice-chair who is now the chair of the foundation. He has strong family links with the school across the generations. He would say that the community is more important than the fundraising.**

**JC: Since you have just mentioned the board, could we have a digression into machinery and structures.**

**SD: The foundation board is a sub-committee of the governing body but it has on it people to whom social mobility and community relationships really matter. We have a foundation chairman and two vice-chairs, and we also have honorary foundation ambassadors.**

**Sir Peter Gershon, chairman of National Grid, is an example of one of our (volunteer) honorary presidents. He is the patron of our most important philanthropic society, The Henry Smith Club, named after our founder. Members give £1,675 a year, based on the school's date of foundation. He is heavily involved with recruitment and helped us to engage further with Sir Peter Lampl, the founder and chairman of the Sutton Trust, who is also a member. This is a good example of peer-to-peer work. Sir Peter Gershon gives generously, sponsoring about four children at any one time as part of his Gershon Scholarship programme.**

**That's the governance side. In terms of the executive, I report to and work very closely with Shaun discussing and developing initiatives with him.**

**This was set within a five-year plan and as part of a longer-term 2025 strategy, which is our 350<sup>th</sup> anniversary.**

**JC: Here's another technical question. Have you set up a separate trust for your bursary funds?**

**SD:** We had a long discussion about this. Should we formalise the foundation and set it up as separate, stand-alone charity or keep it within the school charity as a distinct philanthropic arm? The view at the time was that we hadn't actually done any significant fundraising, so it was more appropriate to remain within the organisation. However, I said that we needed to be absolutely crystal clear that, if we were using the school's charitable number, every donation for a bursary is safeguarded in a separate fund. Thus, we have taken this route for now and there is real clarity on our purpose and the use of donations received. Other schools have set up foundations and there is a cost involved in that. In five years' time, we might think differently.

JC: Enough technicalities for now. Can you describe the stages of your progress?

**SD:** In the beginning, it was a group of people talking about what we can achieve. You do your research, your wealth intelligence, and then you ask what would be a quick success mark, what's achievable. So, we said: "Wouldn't it be great if we could raise £1m in three years for a fund and have 20 bursaries, '1675 scholars'?"

We publicly launched the campaign in January 2014, four terms after Shaun arrived here. The preceding quiet phase focussed on engagement, talking to donor prospects and raising some initial funds to support a few children and to have stories to share. We also invested in branding and our communications strategy through a professional design approach. I've seen a lot of in-house publications and materials that do not match the quality of the vision. The nature and status of major donor prospects demands a first-class and professional offering. The coherence of the brand, marketing and communications is vital. That means that, after five years, our campaign is totally visible, appreciated and understood. We achieved the target of £1m a year early.

JC: What have been the most important sources of funds thus far?

**SD:** We all know that campaigns are very dependent on major donors. Peter Harrison is our most significant benefactor, having sponsored our new sixth form and learning resource centre through a £4.5m donation. Peter is a great example of a modern philanthropist who has achieved so much in his career and was able to set up his charitable trust supporting many causes. Being a former parent and local man of Reigate he understands the importance of helping local communities. He also established at Reigate Grammar School the Harrison Scholars, who are bursary recipients. And I have already mentioned Sir Peter Gershon and the Gershon Scholars. Our chairman is sponsoring a child, which is brilliant, but we also have those who are giving £20 to a £100 a month, and a number of younger Reigatians giving £5 per month. We took a diverse approach to fundraising. During the early quiet phase, we were searching for individual benefactors to sponsor some specific children whilst developing our engagement programme with our broad community energetically.

JC: Did telephone campaigns form part of this?

**SD:** Yes, they did as part of the mass campaign and that worked reasonably well. What it allowed us to do was to engage a wider audience and from that find those gold

nuggets. Through this period, it is all about developing your research, improving the sophistication of your wealth intelligence and profiling your community. That takes time but if you've always got the brand and the campaign, you've got something to cling on to.

There were multiple initiatives. We've talked about sponsorship and advertising and all income from that goes into the bursary fund – the simplicity of the message helps. We set up the international groups such as the American Friends of Reigate Grammar School and the ReigAsian Friends group. Meanwhile, we established regional communities – for example, an Oxford group and a Cambridge group. So, Shaun and I do travel. Our American group makes a significant difference with five pupils currently attending Reigate Grammar School under their affinity-giving scheme based on a shareholder model. The idea came from our ambassador for New York/US.

JC: So, donors can be part-sponsors of a boy or a girl?

SD: Yes, exactly so. As I have mentioned, our Henry Smith Club requires the giving of £1,675 per year and we realised that 10 members working together could fund a child's education here. It has been a success because it is inclusive and you pay according to your level of disposable income. However, the key is the directness of the impact and the sponsor's awareness of the progress being made by the pupil. Some sponsors choose not to know about the child they are helping but, even if that is so, the sponsors receive progress reports and are kept well informed. The Henry Smith Club has 100 members now which effectively donates £200k a year. We also have a patron-level gift of £16,750 which is a one-off gift that aligns to one year of fees.

My MA research was on major donor giving in independent schools in the UK. Through my research, I developed the 'donor elevator' rather than the pyramid model because I found that people do move up and down or enter at different points in a relationship journey. We are regularly reviewing our tactics and analysing the numbers but we are always trying to create a range of options to allow people to support us. We look to the long-term and are working hard to develop affinity at the lower levels of the giving pyramid to engage and establish loyalty.

JC: At the moment, what is the balance between the different sources of funds for the campaign?

SD: In the *Changing Lives* campaign, I'd say that 60-70% comes from the former Reigatian community – former students, former parents – and 20% from current parents. Several are giving full bursaries and one parent is sponsoring two pupils whilst paying for his own three. The rest comes from commercial, advertising and sponsorship activity. If the question were about alumni as such, I'd say it was about 60%. A number of former teachers contribute and they can be big in legacy terms. A strong legacy campaign is really important in all of this.

This is all linked to a communications and activities programme. We have a series of activities: for example, a 'back to school day' where 160 came back and they were all

**pre-1975. We launched the campaign video then in October 2018 and that went down very well, and there will be other activities to share the video. This is all about raising awareness. We've got a legacy society - the 1675 Society. Apparently, if you have 42 people signed up to your legacy campaign, you'll get one legacy a year. Christ's Hospital did a big drive on this when I was there and it managed to sign 540 up within two years.**

JC: If all of this is going to happen and to work, it takes time and effort and people. Could you talk me through the Reigate model of development office?

**SD: Any school looking to establish a fundraising and engagement function needs to invest in time, resources and quality staff. People are the key as we live in a world of relationship fundraising where people give to people. Finding quality staff is a significant challenge. Effectively, there are two other members of the team who are involved directly with fundraising. One is also responsible for the community and engagement events (Reigate community officer), whilst the other is additionally responsible for our communications platforms, including media (development executive). We also have a development manager, who is in charge of the operational functionality of what we do, including database management.**

**It is interesting to compare the difference between people who have a connection with the school and those who don't. Jonny in my team is an old boy, Shaun is a parent, I'm a parent of a former pupil, etc. I was talking to an old boy who is in sales and he said he wanted to get out into development. And we were talking about how much training is needed. If you've got the energy and the character and the message, you can do the job.**

**In the end, fundraising isn't about the ask, although people often worry about that. It's a conversation. You have to deal as an equal with some very impressive people but, at the same time, we are creating community and warmth. I say this to everyone on the team, that we are all involved in relationship fundraising.**

JC: And how important is the head in all of this?

**SD: The headmaster has to be passionate about the school. However, it has to be more than just Shaun. I've got to use other people such as key donors and governors. The key is to have someone who can tee up the ask and then we can use the head's time effectively. That said, most of the major benefactions have been given directly to me and my team. Shaun's role is often utilised through key dinners and events that allow him to entertain an audience and warm them up. He is excellent at reinforcing the message and our need.**

**The key success factor is when the whole of the community buys in and is proud of what you are doing. This is what I worry about in other development offices: are they working in isolation? I have stayed here because I believe in what we are doing and feel that I have complete buy-in. I am working in an environment that embraces the social mobility challenge and where the people are motivated.**

JC: So how does your outreach and admissions programme work to find prospective bursary pupils?

**SD: I go to all the key primary schools and form relationships, which help us to find children who would really benefit from a bursary. So, for example, there is a young refugee who is coming in September 2020. The place is already guaranteed. So, then I could go out to key people and say: "Look. This is the story." Now this might be an individual or a group. Shaun mentioned the cared-for child. His foster mum is going to come to speak at a dinner and the boy has already, in Year 9, stood up in front of 100 potential foster parents. That story resonated so we found seven patron-level donors who got together to play a role in his life. And we achieved that within five weeks.**

JC: Could you give me a summary of the nature of your intake each year?

**SD: Our intake is usually somewhere around 150. We do have increasing demand for entry. We've also just started supporting another prep school. About 30-40 come from our prep schools so there are well over 100 places available and four applicants for every place. There is the normal process of 11+ entry, exams and interviews.**

JC: What comes next?

**SD: As things develop, we have to model what we can do and tailor our resources. I advise other schools to try to research their local catchment areas and work out what demand might be now and in the future. It's not easy. What is real demand for bursaries? We have conducted some research and estimate that we'd need to fund 30% of the school population to become needs-blind and open access. Then we have to calculate how much money it is going to take to achieve that and how do we get that. Our current aim is to raise our investment fund to at least £5m. We ultimately aspire to being needs-blind, this is our vision, though this will take some time since we don't have any endowed funds. However, from our research, we would need to be raising in excess of £3-4m per year. The only feasible way to achieve this would be through a major boost to our fund and that's why we are looking to expand internationally. I am now driving the overseas programme as the head of international business development. Seventy-five per cent of my time is now on the international programme. That's a different way of fundraising and that diversity of funds is really important for the future. The governors, Shaun and I see this activity as a modern form of philanthropy: the commercial benefits will be directed to bursarial provision and our longer-term ambition to be open access.**

JC: This conversation has been about Reigate but you have also been a key figure at IDPE and in the wider debate about bursaries and bursary fundraising in independent schools. Could we just end with that wider perspective?

**SD: From what I can see, more and more schools are doing the right thing and committing to bursary provision through fundraising. I am a big believer in social mobility action and it is a collective purpose. The more schools that are doing this work, then so much the better.**

**I want more schools doing more work and helping more children from disadvantaged backgrounds. It's that simple for me and if our experience and resources can help, that's great. If it helps schools become more successful and enable more children to benefit, then why wouldn't I want that? If schools are utilising charitable status then they need to make social mobility and bursaries their number one priority. Having a moral purpose is crucial and schools like Reigate Grammar School exist within communities. Everything we do is about the service and support we give to our communities. Think of the impact we could collectively make to improve social mobility, diversity and educational opportunity by embracing this fact, this historical responsibility we have.**

**This is an important moment.**

## Chapter 7:

# Eton College

### Introduction

*Eton College was founded in 1440 by Henry VI, the only son of Henry V, and he came to the throne in 1421 at the age of nine months. The school was originally called “Kynge’s College of Our Ladye of Eton besyde Windesore”, which just shows how far the letter ‘y’ has declined in popularity over the last 600 years. The school’s declared purpose was to provide free education to 70 poor boys who would then go on to King’s College, Cambridge, which he founded in 1441. Henry modelled Eton on Winchester College, which had been founded in 1384, and the school’s first headmaster was William Waynflete, the previous headmaster of Winchester and founder of Magdalen College, Oxford. In the beginning, the curriculum was limited to Latin and devotion – not even Greek arrived until the middle of the 16th century.*

*The school did not continue to enjoy royal approval and Henry’s successor, Edward IV, removed most of its assets and treasures across the Thames to St George’s Chapel, Windsor. Even so, by then the chapel in its current form – it was meant to be twice as big as it is today - and the lower storeys of the current cloisters, including College Hall, had been completed. However, there were – and still are – times of great royal support, particularly from George III, whose birthday is still commemorated at Eton’s grandest celebration, The Fourth of June.*

*The institution of the 70 scholars still lives on in College, the house to which entry is gained by the scholarship examination. However, over time, other boys came to live in nearby boarding houses to share in the education, even though these houses were not under the direct control of the school or its masters. These are called the oppidan houses – oppidum is the Latin for town – and by the middle of the 18th century there were 13 such houses, by now run by dames in collaboration with masters. Today there are 24 oppidan houses and the total school population is over 1,300. Even at the beginning of the 20th century, the school had 1,000 pupils, which made it by far the biggest of all the public schools. That, and the fact that young Old Etonians found themselves as junior officers in large numbers, meant that Eton lost more boys than any other school in the First World War. There are 1,157 names on the war memorial at the entrance to the school.*

*Eton has engaged with the wider world in a variety of ways for over a century. In the late 19th century it set up the Eton Mission to work in east London. In the 1980s, Eton was one of the first independent schools to set up a Universities Summer School to raise the academic aspirations of students from state schools, and in 1994 it created the Brent-Eton Summer School, which provided a week-long course for 40-50 post-GCSE students from inner London. In more recent times, the school was one of the driving forces in the creation of the London Academy of Excellence (LAE) in 2012, and in 2014 it set up Holyport College, a state boarding school five miles away from Eton.*

*The school has also made increasing efforts to increase the accessibility of the school to able boys, whatever their backgrounds. In 1972, it set up its Junior Scholarship programme, which funded bright boys not only for five years at Eton but for the two years prior to that. In 1988, it established sixth form scholarships, and in 2007 the headmaster, Tony Little, and Sir Eric Anderson, the provost and former head master, set in place the current strategy. Of the current 1,300 pupils, 21% currently receive financial support towards their fees (averaging a 66% reduction), with 90 boys currently receiving a 100% reduction. The school invested just under £7m on this purpose in the last year.*

## Lord Waldegrave (WW), provost

JC: Obviously, there are lots of independent schools that are living off their original, ancient endowment and some that have been trying to add to that original endowment through fundraising and other means. At the entrance to College Field, there is now a monument to the 'novi fundatores', the new founders, Eton College's major donors, which suggests that you have a strategy of historic significance. Can we talk about what Eton is trying to do?

**WW: Eton has always had a very important social mission, which started with the initial 70 boys for whom the school was founded.**

**We have a broad and powerful vision for an 'educational commonwealth', where schools of all types work productively together for the benefit of students, particularly those students who especially need our help. We believe very strongly that education in the UK is better for having Eton College – and other likeminded schools – embedded within it, and we want to be seen as an important net contributor to that educational commonwealth.**

**What that means in practice is two interconnected strands of activity, one called 'partnerships' and another called 'widening accessibility' which are overseen by a senior member of staff, the deputy head (partnerships), Tom Arbuthnott. Tom will tell you more about it later, but our goal is to see these two initiatives as twin focuses of a revised social mission for the 21st century.**

**Doing this, of course, will take money: using our historic funds enables us to spend almost £8m per year on financial aid and partnerships. We want to increase this very substantially, and we can only do that through successful fundraising.**

JC: So, Eton's endowment is not enough?

**WW: I think your point about living off the original endowment, the original act of generosity, is extremely interesting. Eton is certainly fortunate to have a healthy endowment. It allows us to take longer-term strategic decisions as we have the assurance of a stable, recurring income. However, we are only able to spend a portion of our endowments each year as the principal remains invested to meet the needs of future generations. As the income generated from the endowment, in conjunction with school fees, only covers a portion of the true cost of educating a pupil, in order to operate and provide the education and student experience for which we are known, additional fundraising is necessary.**

JC: Villiers House, the boarding house I had here, was a product of that.

**WW: Eton has always perhaps been more proactive about topping up its endowment than some schools. So, when Eric Anderson, my predecessor as provost, started off a formal appeal with a director of development, a couple of years before I arrived, it wasn't so odd in the Eton tradition. We have a list of benefactors whose names I read out on Founder's Day. Some great benefactions are of a different sort: our Gutenberg Bible for example. But the College was always seeking cash donations and legacies. I**



**came here in 2009 and inherited the 'Novi Fundatores' programme. There was a committee chaired by Simon Robertson and a head of development and this was all done by Eric Anderson. But, when I arrived, I looked round and asked where the 70 scholars were. And there weren't 70. There were about 35 boys on 100% financial aid.**

JC: I used to think that the design of Eton's scholarship exam militated against it being an accessible exam for a broad range of applicants.

**WW: We have changed that now. They don't have to do Latin and Greek. We want the College to be a socially diverse community of brilliant boys, who stand on each other's shoulders in pursuit of intellectual excellence.**

JC: So, when you started as provost, how were those boys funded?

**WW: They were funded from the endowment. I took the decision, which was different from what had been done before, that in future no current fee payer should be subsidising anyone else. All financial aid should come from gifts, whether old or new endowment. Eton's original concept was that the 70 scholars lived off the endowment and were here for free. I have tried to reinvent that concept for all our 20% or so who receive financial aid, that these boys are not subsidised by the others. So, we have got back to 70. We've overshot in that we have 90 and, if you take the 95% bursaries, we are at nearly 100 almost-free places.**

**Our next reform has been to say that we've got two completely different kinds of financial aid running. We've got what we would call, in shorthand, and in our own internal language, 'transformational assistance', 100% financial aid. These are pupils from places and schools where we have built connections, like Liverpool and Tyneside and parts of London. The staff from there can tell us that they have a really remarkable student who could thrive here, and if we think that we are the right school for them, able to bring them on and give them a secure pastoral base, then we will offer them a place, either for Year 9 or for Year 12.**

**Then we have partial financial aid packages. I think this is an idea with which I have some sympathy. We don't just want to be a school for the extreme ends of the economic spectrum, a 'barbell' school. Instead, we also want to be able to offer financial aid to parents who want to send their sons to Eton, and whose sons secure a place, whatever their financial circumstances. We should be saying that we can subsidise people who have a strong desire or need for boarding but can only pay part of the school fees. These two forms of financial aid are quite different kinds of things.**

JC: Do you have to do anything different for the boys on transformational bursaries?

**WW: If you are serious about your transformational financial aid, then you have to pay serious attention. These students need much more help because they are coming to a completely different culture. They are wonderful characters, very brave, but they have to be looked after properly. Bringing boys into Eton's care, especially from disadvantaged backgrounds, means that we have an extra level of responsibility to ensure they are thriving emotionally, socially and academically. They also need to be**

**more than 100% bursaries in most cases: we expect that we will have to pay for music lessons, uniform, computer equipment, plus even pocket money and travel expenses. I was influenced in that by listening to Tony Little, the last headmaster. When he was a boy being funded through the school, he said that he would hear boys talking about going on trips which his family could not afford. It's important that the boys on full financial aid can engage fully with school life.**

JC: So, that's the philosophical model but then there follows supply and demand, finding the funds and finding the boys who do have the courage, the character as well as the intellectual ability to thrive here. Let's start with finding the pupils.

**WW: Obviously, one question is the age at which the boys come into the school. We have gone to and fro between 13 and 16 and we moved more towards 16. Now we have begun to think that both can work.**

**If you are working with the state sector, we think we are going to do better having good relationships with primary schools all over the country who have 11-year-olds everyone agrees could thrive at Eton.**

**That said, there are also a lot of boys across the country who have limited sixth form opportunities, and who have a strong need to board, usually because they live in a place where only a limited number of A-levels are on offer, or because local providers aren't able to cater to their needs. We want to provide a sixth form option for these boys too, and this is why we have created the Orwell Award this year.**

**But this is an example of where our partnerships work can amplify our widening access work. We also sponsor, along with a group of other schools, the London Academy of Excellence, a highly successful selective sixth form in the east end of London, which is doing brilliantly. We do now know how to do something that is effective in terms of social mobility through the LAE. There, 37% of the pupils are eligible for free school meals and 26 of them got into Oxbridge this year.**

JC: I would argue that these selective sixth forms are only doing what Direct Grant schools used to do in the cities of this country 50 years ago.

**WW: It works. And all you need to do is do that everywhere and there are a number of schools in London now that are doing the same. If there is a will, this can be resolved and the journalists are a bit behind on this story. The trouble is, I don't think government funding for sixth forms is adequate: let us hope this improves.**

**So, after my brief diversion beyond Eton, we are now going back to the 11+ to enable us to build better relationships with the state sector. Of course, it is more expensive. We've got to be very careful about our impact assessment and our next big piece of work is research into impact. We have to be clear what we are doing. Are we selecting those who would benefit most from an independent education? I have come to the conclusion we should do both, 13+ and 16+.**

JC: Peter Green, Rugby's headmaster, also said that if the education is really going to make a difference, two years, or rather five terms, at sixth form isn't really long enough.

**WW: It's true that an intervention at 16 is too late for lots of children, whose GCSE results already preclude them from applying to top universities. However, in our experience there are lots of boys out there who manage outstanding grades at GCSE but whose sixth form options are limited, for whom a five term bursary will be transformative, especially if that bursary also involves joining an effective mentoring and support network.**

**There are also things that can be done by schools more intensively, through summer schools or preparation for interviews. That is quite highly geared in terms of benefit.**

JC: To make this happen, whether at 11 or 16, you clearly need very strong relationships with schools. How do you form and maintain those collaborative relationships?

**WW: It takes a lot of work. You need a person entirely dedicated to it, probably in this school more than one. We are also working with SpringBoard but have done the vast majority of our work through our own outreach. It takes a great deal of hard work. You've got to be intelligent about it. Tom Arbuthnott has been building relationships with communities that feel left behind, including places like Clacton-on-Sea, where we sponsor the IntoUniversity centre.**

**We can't try to help change the world all by ourselves. Even a school as big as Eton has its limit. I have now been delegated by the provost, fellows, and the governing body, to open discussions with a number of universities and with the Office for Students to see where, from their vantage point, our effort would be best applied.**

JC: And it's even harder with junior schools because they are by nature smaller.

**WW: Good relations with multi-academy trusts are also very valuable but we are trying to deal with trusts that operate locally rather than nationally. For example, the Slough and East Berkshire Multi Academy Trust, SEBMAT, has three primary schools and we can work more effectively with them. So, multi-academy trusts are advantageous as long as they are locally based.**

JC: It seems to me that schools, particularly schools that are not city-based day schools, have to work harder on finding students who could benefit the most.

**WW: I think when we started – and this is no criticism of anyone because you've got to start somewhere – they thought about the numbers and the money and not enough about the people.**

JC: Did that mean that you were offering places to too many young people who would have been alright anyway or too many for whom the opportunity didn't really work?

**WW: Our governors – called the Fellows – are rightly asking for a theory of change and coherent impact assessment of our charitable spend. This is work in progress, but**

we have recently appointed an outstanding person to be our first 'impact assessment co-ordinator'. She is going to start with our 100% bursaries, but in time will go on to create some metrics so that we can track how well we are doing across all the public benefit work that we do.

The other thing that we hear, of course, is the Michael Gove argument: 'One bursary costs £40k a year whereas if you sponsor a school, thousands of children can benefit.' I think that you have to do both for different reasons. The first thing is to have another look at the scholars to ensure that they are from somewhere that can be transformational. Then there are the other partial bursaries. All that costs about £7m a year. A further outer ring is the £300k to £400k we spend on other partnerships, including Holyport and the London Academy of Excellence. And there have been occasions with Holyport where we have had to top up this funding to support specific projects. LAE only operates so successfully because it has received significant corporate funding alongside contributions of different kinds from partner schools.

JC: So, your rings of Saturn stretch out from College to Holyport and the LAE?

**WW: And when we have gathered some more money and our wits – the institution is running pretty hot at the moment – I'd like to do more of that. But the financial aid element is at the heart of what we do. If you haven't got that, you haven't got your school. Unless you can really look people in the eye and say: "To the best of our ability, we are trying to make sure that people who could use this place can use it," then you are not really happy in yourself.**

JC: In the last dozen years, how has the fundraising worked? Is it alumni, parents, major donors and so on? What's worked?

**WW: The first significant donors were alumni, but we are now getting more support from parents and families as well.**

JC: Of course, there is then the balance between spending it in the here and now and putting money into the endowment.

**WW: Initially when Eric Anderson started fundraising, there was a focus on only building the endowment. Now we focus both on continuing to build the endowment as well as on raising current use funds, which can be spent immediately. Many of our larger donors prefer to help us build the endowment while donors making smaller gifts tend to make current use gifts. Often there is the misperception that these smaller gifts are less important but collectively they add up and can make a large impact. I invented something called the Provost's Annual Bursary Fund. It used to happen that I'd say: "We had 12 boys who were really brilliant but we didn't have the money to pay for them." The fund has helped to prevent that issue from occurring.**

JC: So, this is sponsorship of individual pupils by individual donors?

**WW: Yes. The Provost's Annual Bursary Fund is a perfect example of the collective impact smaller donations can have. We want to put more impetus behind that.**

**Additionally, we have major donors who have chosen to establish a named financial aid fund that then supports a specific boy as well.**

**Having a personal connection is key to raising funds. We have gotten braver in recent years about ‘telling the story’. Our new development director has just produced an impact book, which is very effective: it has two boys telling their own stories very well. That is incredibly powerful, especially when those boys speak in front of an audience.**

JC: So, where next?

**WW: We are of course looking to increase fundraising. Part of the problem in all this is, in this country, it is not so much that the British won’t give, we just have a much less-developed profession of asking for it. Each year, Coutts produces a philanthropy survey. It definitively shows, contrary to what everyone says, that the British are just as generous as the Americans. There is a tailing off in the lower to middle reach but there is plenty of giving capacity in this country.**

**We have had some good fundraising successes in the past but we haven’t had a consistent effort. This makes growing a sustainable pipeline of support challenging. However, with the arrival of our new director of development, we are putting in place an advanced fundraising structure more in line with how fundraising is undertaken in the large US educational institutions.**

JC: One criticism of development directors in the sector is that they just don’t ask enough.

**WW: I had a parent to lunch the other day with boys in the school. He said to me at lunch: “Your development people haven’t been in touch. I hope they do better than my old college. They’ve been in touch with me for two years now and haven’t got around to asking me for any money yet.” This is why we brought in an outstanding new development director from the States who has experience running a complex development department. We need to get better.**

JC: Some would say that the most expensive schools, the forty-thousand pounders, have become so expensive that they cannot make themselves accessible. Nor is giving for bursaries such an attractive proposition as it is in former Direct Grant schools where the majority of the alumni had been educated for free. So, is needs-blind pie in the sky?

**WW: You’ve got to be careful about the phrase ‘needs-blind’ as we don’t yet have the funds to support that. What I *am* talking about is when I’ve got really able boys who want to come here and their parents want them to come here and we want them to come here. That’s not the same as being needs-blind. It is being able to pay for everyone who really wants to come and should come.**

JC: I can remember Martin Stephen saying, when he was high master of St Paul’s, that he would be needs-blind there if he could provide for 30%-40% of pupils.

**WW: We are at over 20% now and our aim is to get to 25% and then to 30% and, around there somewhere, you’re close.**

JC: Of course, a number of schools are going abroad to bring funds back for this purpose.

**WW: That's a difficult business. We have not gone that way.**

**With our brand, we are not going to franchise it out. We would have to run it ourselves and we are not going to do that as we fear it would take too much resource from the mother ship. We would rather build ourselves further into partnership with the UK's education system. However, we have started an online subsidiary, EtonX, which works in global markets to share educational excellence: in time, we hope to create a virtuous circle where funds from that support our financial aid and partnerships provision.**

JC: Your hour is up. You're free to go.

**Tom Arbuthnott (TJMA), director of outreach and partnerships**

JC: I want to start with the big issue: How do you convince donors that giving to a school for accessibility is worth it?

**TA: It has to be something that is visionary and inspiring and it has to be something that you really need. And if you can convince your donor that this is what you need and you don't want anything else, it isn't very difficult to make the ask.**

JC: So, how is your funding – and so your giving – structured?

**TA: We have three different messages about our financial aid provision and each will appeal to a different sort of potential donor, whether alumnus, parent or well-wisher. Firstly, there is 16+ financial aid, which we call the Orwell Award, transformational bursaries where we think we can make a genuine difference to the lives of students who've had limited opportunities, giving them access to top universities. The second are large bursaries for boys in the school for the full five years. These are hugely expensive so they need to go to the boys who really could benefit the most. The third is financial aid that we want to award in order to enable middle-income parents to send their sons to Eton.**

JC: Of course, the quantum for 16+ provision is much smaller, two years rather than five.

**TA: These are 100% bursaries, indeed 100% plus. I think a full bursary in a boarding school for a boy with significant need is going to cost closer to 120%: you need to provide all the extras, you need to assess impact, and you need to allow for additional welfare need. But it is very impactful to say to a donor: "We currently have nine pupils and we want to get to 12. So, your donation is going to enable three extra boys to be educated here."**

**And this is where the bridge to outreach comes because, being smart people, their next question is: "Where are the pupils coming from?" In the last year, we have been**

**working very hard to develop our links and attract the kind of kids that we feel we can make a genuine difference to. We have made four films which demystify Eton life, and make the idea of boarding more accessible to children who might never have considered it. We have also worked with lots of regional newspapers to spread the word: it is incredibly effective when potential Etonians read articles in the local press, in Hartlepool, Sunderland or wherever, telling the story of a boy who has gone from their community to Eton on a free place. We have also become much clearer about stating who we want: we have said that boys in care or on the edge of care or boys on pupil premium should definitely think about applying. We received 147 applicants this year for our sixth form award, called the Orwell Award: this means that the boys we have been able to admit are those who we think will make the absolute most of the opportunity, and for whom other opportunities are limited.**

**It's got to be a coherent approach. We take boys for whom we can be a transformative educational environment; we throw all we can in their direction to make it a success, to the age of 18 and beyond; and then we use a strong narrative of impact, established through partnerships across the country, to convince other boys that this is an opportunity for them. We can't just tell the story in newspapers: we have to continue with films and online mechanisms. Instagram is particularly effective in reaching boys of that age: we have to get smarter here too.**

JC: In order for people to give you money, you need to have candidates who are going to thrive and take full advantage.

**TA: An award of two intensive years at a high-performing boarding school can make up for previously having limited opportunities. We can take a student from any background and make them Oxbridge-ready, as happened last year with one of the boys. He came from a former pit village just outside Sunderland and he has gone to Balliol to do PPE.**

**We do not call this a scholarship, as it is not conventionally academically selective: we are looking for potential rather than performance, and we might easily choose a boy with 7s and 8s at GCSE over a boy with 9s at GCSE. That's why we call it the Orwell Award.**

**So, there's that first element, the transformational 16+, narrowly focussed, clear message, simple for donors and you can find pupils who will do well. They are choosing Eton, we know their abilities, success rate will be high and there will be some really big success stories. Few will struggle and most will thrive.**

JC: What about taking in more vulnerable students than you are used to? Won't it be difficult for the school to accommodate children in care or on the edge of care?

**TA: If we are going to demonstrate the social utility and importance of schools like Eton, then we have to be doing the difficult things, not just the easy things. We are the educational partner of Holyport College, a state boarding school six miles away. Etonians and Holyportians jointly participate in a whole range of activities, from societies to CCF, from rowing to Eton Fives.**

**Holyport is a free school, only opening its doors in 2014. When it started, we described ourselves as educational sponsor, and, of course, we have been involved in lots of ways in supporting the curriculum and supporting teaching at Holyport. We have been delighted with its success, both in terms of academic outcomes – excellent at GCSE and A-level – but also in inspection, with Ofsted granting it an ‘outstanding’ in its first ever inspection in May 2017. All this is particularly powerful given the high proportion of children at Holyport with SEN and from the care system, drawn by its strong model of exceptional pastoral care.**

**However, as Holyport has filled up, we have realised that the language has to change. We can’t be a ‘sponsor’ school as it implies a difference in status between the schools that is anathema particularly to the students. Instead, we have to define this relationship as a partnership of equals of different types.**

**This means that we now write a development plan every year which focuses on the benefits to both schools of being involved in such a close cross-sector partnership. And the main development goal for Eton is to improve our preparation for having looked after children at Eton.**

**If we are proud of our pastoral model, and if we want to be change agents in the educational commonwealth, then we need to tackle the hard questions as well as the easy ones. We have to play our part in important national challenges: and we really feel we can make a difference to the educational and personal outcomes for very vulnerable students. Where we need to adapt our models, we will do so to make a success of this.**

JC: OK, so that’s 16+, although the point about children in care applies throughout the school. What’s the second element in your strategy?

**TA: The second element is 11+ entry. This is 11+, not 13+, because we select boys in Year 6. It has to be a coherent 11-18 pathway: we can’t just say ‘we start in Year 9, so that’s where our financial aid programme starts’. This means, though, that we have to work in partnership with prep schools, allowing us to select boys, usually from state-maintained primaries, in Year 6 and then offer them a route through to their A-levels in independent boarding schools.**

JC: So, what becomes of them in Years 7 and 8?

**TA: We are asking prep schools to partner with us to create a pathway for transformational financial aid from the age of 11 to the age of 18. Prep schools have their own goals in terms of public benefit, but they often worry about taking boys on, especially more vulnerable boys with boarding need, without a certain exit point into a secondary boarding school. Often they have boarding beds available at this age, given that some pupils leave into state secondaries at the end of Year 6.**

**So we might find a boy that we really want to offer a free place to in Year 6 – and we will visit his parents and talk about their options. Usually, there will be a local prep school that is willing to offer them a free place: we tell them that this is an option that we think they should take seriously.**



**Our biggest donor is a former Junior Scholar and Junior Scholarships were an accessibility mechanism that ran at Eton from the 1970s, with the last Junior Scholar being recruited in 2010. He wants to give something back to the programme from which he benefitted.**

JC: What would you say was the position in regard to bursaries and outreach of the prep schools with which you work?

**TA: I was talking at IAPS last week about King Edward's School's outreach programme and what prep schools might do in that regard, and a lot of prep schools are interested. There are lots of prep schools that want to be more active and offer more free places.**

**There are also lots of prep schools that are beginning to offer more coherent outreach and partnership programmes with local primary schools: they, too, are buying into a vision of mutuality and reciprocity between schools of different types that we call the 'educational commonwealth'.**

JC: Consistently, you seem to be saying that accessibility and partnership working are two sides of the same coin. What do you mean by that in practice?

**TA: One of the things that all our partner schools talk about is Eton's soft power. When a boy wins a place here, that is seen as a big deal by the community he comes from. We feel strongly that, when we offer a place, we are not just aiming to work with an individual child but with a whole community.**

**Six or seven years ago, a housing association in the North West approached us asking if we would offer a place to a deserving boy from Chester. We agreed, and also offered to host a bus-load of boys for a visit. Apparently, as the bus pulled away from the school, the whole community came out onto the street to wave them off. The result of that has been a succession of four boys who have come to Eton, and a long-term relationship that we are keen to keep up.**

**That same housing association is now working in Scunthorpe, Lincolnshire. I visited last week, and was shown around an estate called Westcliff, where you can see regeneration in action. It got a bad reputation some years ago when it featured in a Channel 4 documentary called 'Skint', but a lot of local partners are working really hard to raise levels of aspiration and achievement. We were invited to be part of the launch of the 'New Perspectives' program.**

**We would love for a boy in Scunthorpe to come to Eton. Hopefully it will happen sooner rather than later.**

JC: Can you really sustain collaborative projects like this across the country?

**TA: Clearly, we're just one institution, and, work as we might, there are capacity constraints as to what we can do. Our plan is to continue to advertise our financial aid programmes nationally, and then use the boys and parents who apply as 'bridges' between Eton and communities from which they come.**

**We are intending to increase, on the back of donations, the amount of financial aid work that we do. However, one important principle that we have established is to create a relationship between our spending on financial aid and our spending on partnerships, a relationship that our governors can review annually. At the moment, we are aiming to spend 10p on partnerships for every £1 we spend on financial aid by 2025. As our partnerships programme grows, we will be able to service that partnerships programme in ever more innovative ways.**

**To give another example of what we can do: we have had a series of boys join us from east London, working with an inspirational organisation called the Eastside Young Leaders Academy (EYLA). We are now launching a joint curriculum with them, whereby boys and girls from EYLA come to Eton on a regular basis for enrichment and additional teaching.**

**Another example of a structure that can accommodate these relationships is a Middle School Summer School that we are intending to launch in 2021. Historically, we ran a joint summer school with Brent Council for over 20 years, where 50 Year 11 students came every year to Eton for a five-day residential focusing on personal and academic enrichment. This came to an end for funding reasons a couple of years ago. I want to replace it with a model where around 20 schools, mostly 11-16 schools from across the country, nominate four students each who would come to us for a week at the end of Year 10. This would happen every year in July. The students would gain a lot – and we can do it all for about the price of a single bursary.**

**The difficulty with expanding partnership work, though, is that the resources you need tend to be the most precious resources in school – especially the time of your senior teachers, and especially those in STEM subjects. We are looking to move on to doing more with partnership, but you have to build it slowly rather than quickly, taking care to get the foundations well-laid before you start building.**

JC: I know you've set up an internal research centre. Is that part of it?

**TA: Yes. The Tony Little Centre for Innovation and Research in Learning, which we call CIRL, was set up at Eton in 2015 to develop our use of evidence-based approaches in learning. It helps us work with a lot of schools and universities on joint projects about the nature of education. In its first few years, much of the focus has been on how to build character traits, such as resilience, autonomy and gratitude, in young people.**

JC: The provost mentioned Clacton-on-Sea, too. How does this work?

**TA: We have worked for a while with a brilliant organisation called IntoUniversity, which works in disadvantaged areas with children as young as seven who want to go in due course to university. For the last few years, we have sponsored the north Islington centre, along with some other independent schools including Westminster. However, we have decided to sponsor the Clacton-on-Sea centre from 2019 onwards, as we can see real potential in the development of a relationship between the communities of Clacton and Eton. We are visiting in January, and are exploring some ideas around joint projects in drama and volunteering. Watch this space.**

JC: You can't just work with Clacton and Scunthorpe, though. What about partnerships closer to home, in Windsor and Slough?

**TA: We have really strong relationships with lots of local schools, both primaries and secondaries.**

**For primaries, we have a strong 'museum learning' programme around our historic collections, which contain lots of artefacts, from flints to shrunken heads, from collections of natural history to some of the oldest classrooms in the UK, which can really inspire kids. We have a full-time education officer who offers lots of free workshops to local children. We want every child growing up in Windsor and Slough to have the opportunity to visit Eton as a powerful learning opportunity.**

**At secondary, we are an equal partner in a new partnership called the Thames Valley Learning Partnership, which contains six mixed-ability state secondary schools and two independent schools, ourselves and St Mary's School, Ascot. Each school is contributing an equal amount, and, pooling that together, we have been able to appoint a joint co-ordinator who is tasked with organising partnership activities. We only launched three months ago, and we already have a flourishing science network, research network and SEND network, and our environmental photograph competition was opened by the Mayor of Slough in The Curve Arts Centre last week. We will be holding a big student leadership conference for Year 12 prefects from all eight schools in the summer.**

JC: So, in sum, what will be the model of Eton's provision? What you are going to be offering?

**TA: The provost wants there to be a large and increasing number of 100% scholars, as with the original foundation. We have 90 right now and want more. In addition, we want to raise funds to support what we call Access Grants, partial financial aid, because we don't want to be a barbell school, with no children in the middle in terms of income. We want to be able to fundraise so that 25% of the school has partial financial support.**

JC: So, this is the strategy that you have beaten out and refined over the last two years so that you are not just talking about needs-blind. And you need to have that clarity.

**TA: The people who give money are very able people who are not going to switch off their mental faculties when they are giving money. They want the institution to be as intelligent and thoughtful as they have been.**

**So, in that case, impact assessment becomes important. How do you know, as a social mobility charity, that you are spending scarce resources wisely? Most grant-giving bodies would spend 10-15% of their income on impact assessment. In the case of independent schools, this clearly is complicated by the fact that it needs to be both longitudinal, covering the years from 11 to 25, and wider than just academic results. We have just recruited our first impact assessment co-ordinator who is tasked with coming up with a system so that we can report to our governors – and to donors – in a coherent way about how well their money is being spent.**



## Chapter 8:

# Rugby School and the Arnold Foundation

*Rugby was founded in 1567 by Lawrence Sheriff, purveyor of spices to Queen Elizabeth I, as a free grammar school for the boys of Rugby and Brownsover. The school didn't always prosper and it nearly collapsed in 1651. However, in 1750, it moved from the middle of town to occupy a manor house on the present site of School House. By the late 18th century, it had 245 boys and a new constitution secured by an Act of Parliament in 1777.*

*Rugby School came to pre-eminence in the 19th century: after all, the first line of the second verse of the Eton Boating Song, first sung in 1863, says 'Rugby may be more clever'. That status was founded on the greatness of Dr Thomas Arnold (1828–42). He treated his senior boys as gentlemen, increasing their duties so that they shared responsibility for moral tone and discipline with him. As Arnold put it: "First religious and moral principle, second gentlemanly conduct, third academic ability." Masters were expected to supervise as well as teach; the dames' houses were abolished and pastoral care was born. The 260 boys Arnold inherited became 360 by the time he died. No fewer than 23 of his assistant masters became headmasters of other public schools between 1842 and 1899.*

*However, it was not only Arnold that made Rugby famous in the 19th century. There was also Tom Brown's School Days by Thomas Hughes, which created Flashman and the abiding image of public school life, precisely the kind of life which Arnold was changing. And then there was Rugby football, inadvertently created, according to tradition, by William Webb Ellis in 1823. For some reason, it was Rugby football, rather than Winchester or Harrow football or the Eton Field Game, which became the game of choice in schools. Nor was rugby the end of it because Pierre de Coubertin, the founder of the modern Olympic Games, was much influenced by reading Thomas Hughes and by seeing at Rugby the power of organised sport. As one world expert on Olympic history says: "Thomas Arnold was the single most important influence on the life and thought of Pierre de Coubertin."*

*In the 20th century, the school continued to grow and change. There were 580 boys in the school at the beginning of the century and 800 students under Brian Rees in the early 1980s. In 1975, three girls joined the sixth form and by 1988 there were four girls' houses. In 1992, girls were admitted at the age of 13 and now there are 400 girls in a school of 815 students both day and boarding.*

*From its very foundation, the school has had a strong tradition of accessibility. As widening access to Rugby remained central to the school's DNA, the Arnold Foundation for Rugby School was set up in 2003 to fund places for pupils who stand to gain the most from a boarding school education. In 2011, the school engaged in a feasibility study with a team from McKinsey which worked on a pro bono basis to assess whether the Arnold Foundation could be rolled out nationally. The findings were clear. There was huge commitment from other schools to deliver a similar programme. The headmaster and chairman of the governing body became trustees and the SpringBoard Bursary Foundation, now the Royal National Children's SpringBoard Foundation, was established, drawing on Rugby's Arnold Foundation model.*

**Peter Green (PG), headmaster, and Kerry Wilson (KW), director of development**

JC: My first two questions are about the history of the school and how bursary provision has grown out of that history.

**PG: When he founded Rugby School, Lawrence Sheriff, left a parcel of land which was a third of his 24 acres purchased in 1560. That land is now the Rugby estate, in Bloomsbury, right beside Great Ormond Street Hospital. This commercial and residential rental provides us with a significant income every year, £3.7m. That money is used for three things: for capital projects, which sustain the estate, for bursaries for day students at the school and for the local grammar school. We support Lawrence Sheriff Grammar School, which was founded by us just over the road. It is a state school, independent from us, and they get about £0.8m a year from the estate.**

**The rest of the money goes to Foundationers. There is an Act of Parliament which requires us to have 43 Foundationers and they are day boys and girls. This has changed its spots in recent times. It used to be that a Foundationer had to live within five miles of the Rugby clock tower. Now it's in the region of 10 miles because the friction of distance has changed. Before Patrick Derham, who became head in 2001, we used to have major and minor Foundation Awards – not scholarships – from the Rugby estate: minor was 50% off day fees; major was 100% off day fees. This wasn't means-tested so there were some affluent people who were getting a very good deal at that time. In the late 1990s and early 2000s, there was a general drive to move to greater access, to move from these big awards to means-tested awards. Scholarships in some schools went down to zero, some to 5%, some to 10% and that was admirable at that time. So, in the early days of Patrick's headship, with that idea gaining ground, he and the governors reduced our scholarships and day Foundation Awards to 10%, even though we thereby lost some bright pupils to schools that continued to offer bigger scholarships.**

**So, the Foundation Awards went down to 10%, but that then opened up means-testing: we means-tested those who won those Foundation Awards. So, now we have more than 43 Foundationers in the school and we have a significant number of boys and girls who are on free places through the Lawrence Sheriff bequest.**

JC: So, the academic award is now bolted to the means-testing mechanism?

**PG: Yes, and there are some students, within 10 miles of the Rugby School clock tower, on 110% awards because their parents are in difficult financial situations: Overslade is one of the most deprived areas in Rugby and we have boys and girls from there. This is widening access as well as being for academically able boys and girls.**

JC: So, you are trying to be diverse and accessible whilst at the same time remaining true to the academic standards and excellence of Rugby's tradition?

**PG: Then Patrick decided that it was a bit daft that we could get Foundationers from areas of social and economic disadvantage but only for day pupils. So, he asked: "Why can't we have something that reflects the fact that we are a boarding school?"**

**Of course, we started as a day school but by the 1820s Rugby had become increasingly a school for those coming from some distance and not for those in the town, which was the founder's wish. The foundation of the grammar school was a response to objections coming from the town to the reduction in day places.**

**Patrick's idea was to widen access to boys and girls through boarding – to be able to do for boarders what we had been able to do for day students. After all, we are over 80% boarding these days. So, Patrick started the Arnold Foundation and it was amazing, properly amazing. We have raised almost £22m. We've now got £7.8m in our endowment fund, which provides income for seven funded boarding places for disadvantaged kids every year. We want to get that up to £35m so we are paying for 35 full-fee places. At the moment we've got 29 Arnold Foundation students in the school and 136 students who have benefited since 2003, and that includes those who are currently in the school.**

**Patrick's idea was to look for children who had a need for boarding. That is not easily quantified. It's not just economic. We decided to identify these candidates by forming links with partner institutions. These institutions work with disadvantaged young people: IntoUniversity, which now has 30-plus centres across the UK; Eastside Young Leaders' Academy with Ray Lewis; the Horizon Foundation; Clarion Voice (now the Clarion Academy) in Leicester. We didn't think that schools in the maintained sector would want to work with us but were delighted that this was not the case. The first school partnership was with Hawick High School, an approach we made because Patrick had a family connection in the town. This continuity of relationship was very important and they got used to identifying the kind of child who might thrive with us. So, if you were to meet some of the Arnold Foundation kids, their backgrounds are extraordinary in the difficulties they have had to endure and yet they have thrived in this environment. And, in the summer holidays, these institutions are providing support for them to study in their home environment.**

JC: One question that is often asked is whether bursary pupils need any special provision. This might differ from a day school to a boarding school, when home is a long way away. Could you explain about your Arnold Foundation tutors and methods of support inside the school?

**PG: The Arnold Foundation tutors are available during the holidays as well as during the term time where necessary, because, of course, things aren't always easy or safe at home. There was one boy who came from an area of London with a high crime rate and socio-economic disadvantage. He had a strong mum with a strong church-orientation but the tutor helped too. He now has a senior role at the Ministry of Justice UK.**

**We also have a parent liaison team: former Arnold Foundation parents are involved, liaising with current parents, providing support, guidance and advice on the phone, by email and in person at events. All the Arnold Foundation Awards, or almost all, are 110% and that 10% goes for course trips abroad, uniform, laptop, books and other essential extras. We cover all costs of families during the recruitment process including**

**travel and overnight accommodation. Students often tell us that their concern before they arrive is that they won't fit in, but this rarely happens and they quickly become part of our community. When the student joins the school, dedicated pastoral support is directed to the student. We also work very closely with the partnership organisations. Their representatives come and visit us at least once every year. We also go and visit them. We work very hard with them.**

**The former students are Arnold Foundation ambassadors and are much involved, they speak at events, mentor each other and provide some support to current pupils. Each Friday morning, we host Arnold Foundation breaks so that Arnold Foundation students and tutors all get together, from the senior ones to the new ones in F Block (Year 9), who might be wondering what it is all about. They are looking after each other and out for each other so there is a great internal network. And then occasionally we will have a dinner where we will get them all together. We have a senior member of staff who is the Arnold Foundation senior tutor who oversees the Arnold Foundation tutors so that they are liaising not only with the house masters and mistresses but also with her. There is never a shortage of teaching staff willing to step up and be Arnold Foundation tutors with so much interest and internal support for the programme.**

JC: How does selection work?

**PG: The vast majority of candidates come from partner organisations and some make independent applications. The recruitment process is rigorous with examinations, preliminary interviews, school reports and references and a final interview at the school in January before September entry. I have Arnold Foundation governors and senior members of staff who do those interviews.**

**We filter before the final interviews: we don't want to get boys' and girls' hopes up because it is a big chance. Kerry, the director of development, and the admissions director work with our partner organisations. Normally, by the time they come for final interviews in January, we are rejecting only a small number of them. We are making sure that they are then the right candidates before the selection process starts.**

**We have a person specification for an Arnold Foundation student which I would advocate to all schools. It's what we are looking for and how we will recognise them.**

**And they have talent. Two years ago, lead roles in *Much Ado About Nothing* were both Arnold Foundation students. Both of them went to the Edinburgh Fringe, which was funded by the Foundation. One student with an offer for Cambridge was in the lowest sets when she arrived with us. So, it is trying to see potential. Of course, they are going to have to be able to cope academically, but are they going to be able to offer something else? We currently have two Arnold Foundation boys who are heads of their houses. Both really athletic – one is a top sprinter, on the wing for the rugby team, although he prefers football.**

JC: Do you have a separate trust, a separate committee for the Arnold Foundation?



**PG: The Arnold Foundation is a charitable company owned by the school. The Arnold Foundation is ring-fenced as a separate trust and the clarity helps: donors know where their commitment is going. The Arnold Foundation board, which was established in 2003, is a sub-committee of the governing body. This has now morphed into the development board to embrace capital and bursary fundraising. Until now, we have only focussed on fundraising for bursaries. However, we do have a significant group of people who have wanted to donate to other things and we have had only a few small capital projects over the last 15 years to which they can direct their donations.**

**A small number of donors have made major gifts to the Arnold Foundation but their contributions have been acknowledged with naming rights in other areas of the school. The development board gets progress reports on how the Arnold Foundation students are getting on, what is happening to those who have left. The current chair is a governor, not an Old Rugbeian but a major donor who had children in the school. There are others involved: a former parent, a couple of current parents, the chairman of the Old Rugbeians, the chair of governors, who is also a major donor. They oversee the strategic development of the programme and they are also there to raise money through their connections.**

**JC: Every school has its own context and its own reasons for doing things the way it does. What lies in the future for Rugby School?**

**PG: We do need to continue to fundraise. We want sustainability, a Lawrence Sheriff endowment fund which is going to pay for the Arnold Foundation in perpetuity. We are trying to have some discussions now about the more distant future. We have opened up a school in Thailand which is going to contribute a significant sum. I would like all of our overseas schools' money to help widen access to the school. Rugby School Thailand is just about to set up an equivalent of Arnold Foundation for boarders in the new school. Replicating the Rugby DNA.**

**However, there is also another argument about the socio-economic profile of the UK students. At the top end, there are parents with very substantial means and then, at the bottom end, there are the Arnold Foundation students from disadvantaged backgrounds. But there is a gap in the middle. So, how far can we reduce that gap?**

**I would like Rugby School to have students from every single socio-economic group, not just the very wealthy and those on very low incomes. That's a needs-blind idea, but what does that mean in real terms?**

**I think we should continue the journey. We have started with the Arnold Foundation and there are now headmaster's discretionary awards, which is a relatively recent initiative. We are now making much more use of the estate in the summer holidays and making a surplus of £700k, all of which can be invested in widening access.**

**We know that affordability is going to come from finding funds from elsewhere. Very few schools will have more than 40% of their children on some form of scholarship, means-tested bursary.**

JC: One of the things that heads worry about is their role. What do they do? Do they have to ask for the money? How does it work for you?

**PG: It is about me trying to tell the story. Kerry, who has just walked in the door, does all the groundwork. The head may not have to do so much here because we have such a story at Rugby School. There are so many willing evangelists: governors, Kerry, academic and other staff, students. The story is now being told by lots of people.**

JC: So, it's now embedded after more than 15 years.

**PG: Yes. A correct criticism of me is that I haven't gone on about the Arnold Foundation enough. We are now resetting the dial because I am passionate about it. It is part of what we are about. I now ensure that I speak about the Arnold Foundation at each of our Rugbeian parents and friends' events.**

**KW: Like many schools, we ask parents to leave their entry deposit. So, at a parents' evening for the upper sixth, we took the opportunity to say that you would write to them and hoped they would look on this favourably. And you did and they have. A couple of our Arnold Foundation students who are in the school spoke on that occasion.**

**PG: Some parents who were at that meeting have said they have given in addition to their deposits. And we do always try to get the Arnold Foundation students to speak because they do such a good job.**

*Exit PG*

JC: Kerry, can you tell me your own story before you came here as development director?

**KW: I spent my early career at The Open University. So widening access, creating opportunities, was central to my work. At a time when the vice chancellor had a global vision for The Open University, I ran the secretariat for the European Distance Education Network (EDEN), which is still strong. The wall had come down and Eastern European countries were excited by the distance teaching offered in Western Europe. I had a really interesting role with a board made up of ministers of state and rectors of universities across Europe. So, those wider relationships were part of my previous experience: managing up, dealing with volunteers, working with board members who were far away. And the central issue was access to education.**

**I came here more than 17 years ago.**

JC: Are you the longest serving development director?

**KW: No. Doug Collins at Harrow takes the medal by some considerable margin and Patrick Mulvihill at Uppingham was appointed a few months ahead of me.**

JC: Since you have this longevity, what are some of the main pitfalls associated with fundraising in independent schools? This area of work requires time and money, and of course schools need to be patient while they await the payback...

**KW: It was ever thus. I was a founding member of IDPE 20 years ago and I am the only one of the founding directors still working in a school. The attrition rate has always been high – I don't believe it's any worse than it was. The reason for this is on both sides. Schools hire people with an expectation that development will be a magic bullet and it isn't. The individual or the task is not embraced and then it doesn't work. And, on the other side, people coming into schools think they are going to be able to make a difference but perhaps don't embrace the school culture or find it isn't as they imagined. Or, there are people who move into schools from other sectors and start interfering in areas of school life about which they know nothing.**

JC: So, back to you and Rugby.

**KW: When I arrived 17 years ago, Patrick Derham was a year in. He had an ambition for the Arnold Foundation and needed someone to raise the funds. The school had been offering day places under the Lawrence Sheriff scheme since time began and Patrick was very clear in his vision: he wanted to do for boarders what we had always done for day pupils. I had inherited some small fundraising initiatives and we swiftly drew outstanding capital fundraising to a close. The Arnold Foundation for Rugby School was launched in May 2003.**

Capital fundraising in the past had mixed fortunes, but over time it had brought in millions and substantially helped the school, with major work in the science schools, a chapel organ, the Temple Speech Room and refurbishment of several boarding houses. The appeals office had been run by an increasingly part-time member of the teaching staff whom I still see – a former housemaster and teacher of English – who was highly regarded and had done a really good job. At the outset, I set my team the task of going back over all the past giving. We inherited all the records, reviewed and recorded everything and concluded, we have a really good history.

Originally, the Arnold Foundation was going to be the umbrella for all school fundraising at Rugby, bursaries and capital. However, we realised very soon after launch that, if the bursary piece was going to be successful, we needed to focus on it and our donors needed to be confident that any money they gave to the Arnold Foundation would not be redirected to capital projects.

JC: Rule 27: singularity of purpose.

**KW: No, not Rule 27. Rule 2. Rule 1 is you need your vision, clarity. That is massively important because the golf bag of different clubs model wasn't going to work for us. We had a golf bag previously but people wanted absolute clarity and we were able to deliver that.**

So, about 18 months in, we decided that it was just going to be bursaries. It is also obvious that bursaries don't suit everyone, so we probably lost some donors along

**the way. However, we did also try to scoop some up. For example, the commitment of one donor was celebrated in another area of the school but their donation has been directed to the bursary pot with their blessing.**

**So, for 15 years we have been fundraising only for bursaries.**

**Recently we celebrated the 15th anniversary of the Arnold Foundation. There is a maturity to it, an understanding of it and a solid group of alumni who have been through the system and who are great advocates of it.**

JC: What has mattered most in the success of the Arnold Foundation?

**KW: The most important thing – it was true then and it still is the case now – is finding the right students. For a boarding school, that is a different task than for a day school. We were clear from the start that we would not advertise: we felt sure that the people we wanted to reach wouldn't respond to an advert. So, we identified and engaged with those partner organisations, educational charities working with young people and some schools in the maintained sector, who linked us in to disadvantaged communities. That is where we have put in a huge amount of effort and energy over the last 15 years to identify candidates who would really benefit.**

JC: That's not the obvious or common response. Schools sometimes think about the supply of funds but not enough about the demand for places.

**KW: My role may not be unique but it is certainly unusual. I have been here from the beginning, so I am much more involved in the delivery of this programme than any of my counterparts. I am involved directly with all of the partner organisations, the recruitment process and final interviews.**

JC: In a day school, success in bursary provision is like a three-legged stool: fundraising, outreach and admissions.

**KW: Well, if that is so, I am involved in all three. I play a role in the recruitment too and chair one of the two final interview panels. We are still working really hard to get the right students by working with new partners in bilateral relationships. Rugby continues to recruit through SpringBoard but it has not been possible for SpringBoard to deliver all the students we want: it works with 90 accredited schools, all offering places for talented young people from disadvantaged backgrounds.**

JC: And what about the route to fundraising itself?

**KW: We had to get our message right and Patrick Derham was a fabulous advocate. Many have heard his story of early school days on a ship. As a young boy he was sent to school on the training ship Arethusa moored in Chatham Docks. A few years ago, I visited the same ship – then at the South Street Seaport in New York, and could only imagine how grim it must have been for a young boy at boarding school on a drafty ship and sleeping in a hammock. But at the age of 14, Patrick's life was transformed by a bursary and he went to boarding school. That's a very powerful story.**

**And by recruiting the right students, we have developed our own moving stories, our own passion and people whose lives have been changed forever. One former student who came from a mining village in Northumberland is now an ENT surgery registrar working on a really prestigious research project. He has a family of his own and loves the Arnold Foundation. He gave the Arnold Foundation lecture two years ago.**

**So, our success has benefited from creating this big community on which we draw and build. I have known everyone from the start and I make it my business to keep in touch with them. We also have occasions when they get together, and we encourage the older students to mentor the younger ones and the former students to mentor the current ones. It is a very integrated piece within the school.**

**The Arnold Foundation ensures the governing body thinks and is challenged about the way we support our bursary students. Many of them don't need anything but we have worked hard to ensure that pastoral care is first-rate and extra. That's why we have the Arnold Foundation tutors and that works extremely well, giving us an additional pastoral commitment.**

JC: Schools can sometimes be coy about who the bursary students are, whereas you are bringing them together deliberately and obviously and celebrating that.

**KW: We thought in the early days that anonymity was going to be important, not to share who they were. But, of course, these young people are so proud of their award that many blow that straight away. 'I am here on the Arnold Foundation.' It's an honour. They feel thrilled and privileged.**

JC: I suppose that Rugby was helped by having the Foundationer tradition, too, for the day pupils. So, you've got the recruitment and the community. What about raising the money?

**KW: We've tried many different approaches and received donations from many different sources. Pretty much all of it has come from donors with a Rugby connection. We had one introduction to a private foundation, which works with refugees and brought Tibetan refugees to Rugby. That was a specific programme. We do also have a small cohort of students from Hong Kong. They are funded by Hong Kong donors including a foundation. There have been 10 students through this scheme and it has been hugely successful.**

**All other money raised goes to fund students from the UK. And it is true that 90% of the funding has come from 10% of the donors. We have had success in individual students being funded. But this level of commitment has most usually come from private foundations, not an individual. So, for example, a Rugbeian who died many, many years ago asked executors and trustees to consider Rugby School as a beneficiary and the Arnold Foundation has benefited from their generous engagement. They funded sixth formers for a number of years. Quite a lot of the donations and the commitment has gone around in a cycle and some has come to a natural, understandable end, and we are looking now to refresh our income with new major donors.**

JC: There comes a moment for big donors when they feel they have done their bit.

**KW: Yes, but their bit has probably lasted 10 years because we have engaged with them well and involved them in our successes.**

**We are now working hard on identifying other donors, and one of the ways we do that is through promoting all the good stories from the students who have gone through the programme.**

**We have 30 Arnold Foundation students and are keen to maintain that level. We have learnt a big lesson. In the beginning, we were looking for children who would really benefit from boarding and we were less concerned about academic standards. However, there is quite a mountain for these youngsters to climb. If academic work is a struggle, they find it hard to get the best out of this place. It can become difficult. And, if an Arnold Foundation student struggles when there are high expectations, it becomes a wider issue within the school and that isn't fair on anyone, especially them. So, in the last two or three years, the academic requirements have been raised. Candidates need to be strong academically, or really strong at music, art, drama or sport and strong enough in their academic studies.**

JC: Are all the Arnold Foundation students here for five years?

**KW: We take some in the sixth form too. We thought originally that it would be easier for students recruited to the sixth form to cope because they would be more mature, but the 18 months they are here isn't long enough. We know that if you have a child for five years, we can offer so much more and they can get so much more from the opportunity. And we have become so much more experienced at choosing the ones at 13 who stand to benefit the most.**

JC: Schools that are raising money usually have a tension between pay as you go and creating an endowment. How has the balance been for you?

**KW: We were really lucky because our early donors wanted us to spend their money. And those individuals, organisations, charities who were funding one student, they wanted to see that student go through. That was the whole point. And, of course, the Charity Commission doesn't allow you to place donations into endowment unless a donor has given for that purpose. So, we achieved a good balance. We adopted different funding models. One group of people who worked together decided that they wanted to put a significant sum into endowment and they did that collectively, and the income funds a student every year.**

**Because the Arnold Foundation has been so successful and our aims were so closely aligned, we received £0.5m that represented the final assets of a charity – a school which closed in the 1980s - that had been wound up; this was placed in the endowment pot as well.**

**What we have also done is to make it clear that any legacy to the Arnold Foundation, or to the school, will be put into the endowment fund. The endowment is designated as expendable endowment but it is our intention to maintain and build on it.**

JC: How are relations with the Rugbeian Society? That doesn't always work out.

**KW: We established a strong relationship with the alumni society and relationships are great. When I arrived, the Rugbeian Society was in a strange old shape, with a committee of 60 and they didn't use email. It's the story we hear from so many schools. But we had a transforming president who knocked it all into shape. And we have a change of president every three years and a secretariat that is run from the school. Unlike other schools, we haven't taken control but we work incredibly closely together. The president of the Rugbeian Society is also a governor and trustee ex-officio of the Arnold Foundation. The danger is that the alumni can feel the only time we contact them is to ask them for money.**

JC: So, what is the financial situation of the Arnold Foundation now?

**KW: The Arnold Foundation is only funded from donations and the income from the endowment. We have £8.3m in the endowment fund and we raise income annually. How much we spend depends on a number of factors including recruitment and financial need. We will award up to 110% for fees and essential extras but no less than 90% because, if a family can afford more than 10%, we don't believe they fit into the Arnold Foundation category.**

JC: How have you managed to keep the momentum going over this longer period?

**KW: It's very hard when you are in permanent campaign. We have used key moments and milestones. When we had our fifth anniversary, we were encouraged to announce an aspirational target of £30m. It was an arbitrary figure and at the time wasn't particularly helpful. Targets need to be meaningful. More helpful for us has been clarity regarding our ambition for recruitment and simplicity in the presentation of our fundraising requirement to achieve this.**

**We have been working really hard on our legacy campaign because this is future income. We used the 450th anniversary of the school in 2017 to kick-start and refresh our legacy programme. We achieved over 300 pledges and at that time did not know of any other independent school with more legacy commitment. Some of these pledges have been realised and we are now aiming to secure at least another 50 more pledges every year. We are keeping the momentum going with the campaign. Many of my colleagues in other big schools agree that a legacy programme is the way to deliver bursaries in the long term.**

**We have also used the success of our students to drive our activity. We've used every milestone and anniversary to celebrate success. Our 15th anniversary last year of the Arnold Foundation was a major event and we brought all our major donors together. Our stewardship has been very important, and we do bring our major donors together on a regular basis and introduce them to students. One of the things they all have said is: "We don't want particularly to be thanked. We don't want our names in lights, but we do want to hear from the students."**

JC: And how have you measured progress, proved your virtue?

**KW: The development board and the governors always want to know how much money is coming in. I report directly to the development board and I go to every meeting of the governing body and have my 15 minutes. I am also a member of the senior leadership team. I have my weekly meeting with Peter alongside a dual reporting line. I report to the headmaster but I also have a dotted line to our new chief operating officer regarding our finances.**

JC: And how big is your team?

**KW: There are five of us. An assistant director of development who is looking after legacies, regular giving, phone campaigns. We haven't done one for years but are planning for this year.**

JC: Why have you not run regular phone campaigns?

**KW: We ran one in 2006 and then I had a board which was absolutely against them, disliked being called themselves, were so adamant that we parked the whole idea. There were plenty of other things to do so I didn't feel a great pressure to introduce a telethon, though I know they can be massively successful, for affinity as well as fundraising.**

**The third person in the team is a senior research officer, who has come from Oxford University. This is a new departure for us, but I have found something I wish I had known before. He identifies all the people I need to speak to, manages our prospect research and the contact and record keeping for our prospects. He is also an expert in due diligence. It adds hugely to the whole fundraising process and we are just starting to see the benefits. I wish I'd thought of it years ago.**

**Almost no other school does it but perhaps that's because my role is unusual: I have a role in managing the operational delivery of the Arnold Foundation programme across the school, whereas most of my fellow development directors don't. I am engaged in things that I probably wouldn't seek involvement in if I started here now. I have a great deal of accumulated knowledge, which is of great value in many areas.**

**I also have a data and finance person. We handle quite a lot of our own financial affairs inside the office, not only managing gifts but handling expenditure for our students. The data role is updating records, answering queries and so on.**

**And then there is a fifth team member who looks after the many events, general administration and works as my personal assistant.**

JC: What about all the media and publications?

**KW: The Rugbeian newsletter comes from the Rugbeian Society. Our assistant director of development produces the Arnold Foundation review. The website is managed by our marketing team and our new online platform and its associated app will change**



**everything, being able to communicate directly with Rugbeians, pushing out newsletters through that platform. This is a shared process with the Rugbeian Society. The technology has become so simplified for the user that you don't need a huge amount of social media expertise to make quite a good job of it.**

JC: One other thing that taxes schools is the issue of the head's time and what they do. And another thing is the ask. How much of your time is spent dealing directly and personally with potential donors? And, since heads can worry they haven't been trained for this, how does it come to pass that people do give substantial sums of money.

**KW: Oh goodness, this is so not rocket science. When you are asking for money, you've got to be a really good listener. It's so important to listen to what each person is telling you in order to understand how their interests align with those of your school.**

JC: A development director I once worked with would say, unless it's a conversation, you are never going to get there. There isn't really an ask because you all know why you are there.

**KW: Yes – it definitely needs to be a conversation. And, if the person you are going to ask doesn't know why you are there, you are unlikely to be successful. You set it all up. 'I want to come and talk to you about your involvement.' The initial approach might not say that I am coming to talk to you about the amount of money that I am going to ask you for, but you are corresponding with someone, talking to someone who knows exactly what the deal is. One of the reasons why people don't secure donations is because they don't get around to asking.**

JC: One of the challenges can be that development directors don't get out and ask enough.

**KW: I think that is very true. We have a massive programme of events and it is so much easier to approach those conversations about a donation when you have met someone before. That's where events are so valuable, the opportunity to talk in a very comfortable environment. Then you can follow up.**

JC: You mention events. What is your programme?

**KW: There are probably between 40 and 50 events in the course of a year. They are of differing sizes, some run by the development team, some run by the Rugbeian Society. Most of them are not fundraising events. They are about gathering people together in different groupings, reunions for different houses, year groups, one year, five years, 10 years, 30 years, 50 years out of school. I recently returned from Scotland where we were hosting an evening for the Scottish Friends of Rugby and 60 people came along, a mixture of parents and Rugbeians. These events are enabling the whole community to gather and we are good also at involving parents. At events, we may not ask for money but we will convey that it matters to us. And the more you get the message out, the more people feel it is a good thing to do together. Then I can follow up. Some of my most successful asks have been when a donor has said to someone: "You need to be involved with this as well. I am going to ask Kerry to come and talk to you."**

JC: There is lots of talk about friend-raising and patience and it takes a long time, but I sense that things don't always happen as a result of direct conversations.

**KW: I have had experience of people with whom a relationship has been built not through me but through the Floreat, the school's magazine, and through other magazines and communications. They have kept in touch with the school but not necessarily through any individual. And, when they hear about a project that they might want to get involved in, they say: "Yes, I'm here." So, it's important to keep sharing news of students' successes, promoting strong messages, inviting them, even if they don't come initially.**

JC: How many major donor meetings are you involved in during a month or a year?

**KW: The short answer is not enough, but I am seeing people a lot. And, because I have been here a long time, I know so many members of this community and I am able to approach those individuals we know are engaged or may be tempted to get involved. I want, in this new campaign for the capital project, to be meeting 20 people a month. I would like to be able to achieve this reasonably quickly.**

JC: For many people involved in this work, meeting alumni can be exhilarating and their contribution massively enriches the school, and not just financially.

**KW: I agree. Some of these people have become personal friends. I was recently at a memorial service for a Rugbeian who was a dear friend. I always say that it is one of the most extraordinary jobs because of the profile of those people with whom you have the privilege to work, and a group you wouldn't come across in any other role including captains of industry, creatives, academics, entrepreneurs and there are hundreds of them. They care about the school and engagement is not work for them.**

Perhaps the excitement of finding and dealing with such extraordinary people is lost sometimes. With five people in the team you could be seen as a bit of an overhead and an expense, and it's not necessarily obvious that the development work is enriching the academic life of the school and its future. But the contribution goes far beyond the money.

**We never have any shortage of Arnold Foundation tutors – the staff love being involved and find it incredibly rewarding. It is no accident that, when we started the Arnold Foundation, 4% of Old Rugbeians were sending their children to the school and now it is 20%. To attract them back from all over the world isn't easy, so that growth is really significant. And I hear again and again from parents who say they chose Rugby because of the Arnold Foundation.**

JC: So, all of this makes the school a better place. What more could anyone ask? We'll end it there.

## Chapter 9:

# Westminster School

*Westminster is one of the foremost centres of academic excellence in the country: each year some 45% of pupils are accepted by the universities of Oxford and Cambridge, 50% choose courses to suit them at the country's other leading universities and 5% (a growing number) take up places at universities in America. The school is also unique in London in that it still occupies its original site and that site is unique: it lies between the Houses of Parliament and Westminster Abbey and the Abbey serves as the School Chapel.*

*Westminster is an ancient boarding and day school and its origins can be traced to a charity school established by the Benedictine monks of the Abbey of St. Peter in Westminster: it is more than likely that this spiritual and educational tradition goes back as far as 960 AD. After the dissolution of the monasteries in 1540, Henry VIII personally ensured the school's survival by statute. His daughter, Elizabeth I, re-founded the school in 1560 to educate '40 poor scholars'. The broader ethos of the school resides in the enduring values of the liberal tradition reflected in that 1560 charter where it is stated: 'the youth which is growing to manhood, as tender shoots in the wood of our state, shall be liberally instructed in good books to the greater honour of the state.'*

*The school has stayed in the same place but it has also changed in time: in 1943 it created an Under School for boys aged between 7 and 13; in 1973 the sixth form became co-educational. In recent times, it has also been an innovator in its contribution to wider education beyond the independent sector: in 2014, it collaborated with the Harris Foundation to create a highly successful sixth form, Harris Westminster; in 2016, it created Platform, an academic enrichment programme for London state primaries; in 2017, it announced a plan to open six schools in China. And, finally, in 2018 headmaster Patrick Derham launched The Westminster School Campaign to provide life-changing bursaries with the long-term ambition to become needs-blind.*

*With such a history, it is not a surprise that it has a remarkable list of alumni, ranging from Ben Jonson, John Locke and Jeremy Bentham to Flanders and Swann, Martha Lane Fox, Helena Bonham Carter, Andrew Lloyd Webber and Dido.*

**Patrick Derham (PD), headmaster**

JC: Patrick, you were a key figure in the accessibility agenda in the independent sector with your work at Rugby. Now you are launching a campaign at Westminster. Could you share with me some fundamental principles about what you have done and are doing?

**PD: My strongly held position – and my concern – is that you shouldn’t do it because of a perceived political threat. You should do it because you believe in it and that is, for me, the most important point. If the governors, the head, the senior leadership team and the community don’t believe in it, it is not going to work. Full stop. We all have a responsibility to make a difference to young people’s lives. The best thing that Michael Gove said, and it will stay with me forever, was: “I want every young person to be the author of their own life story.” And that is what gets me out of bed in the morning and it’s the same for you, and for David Goodhew and Martin Boulton, and others. There are people who are passionate, partly as a result of their own experience and partly their own upbringing. They have lived, as I have, that transformation through education, and can see the benefits of it.**

**The story at Rugby was interesting. When I went there in 2001, Rugby School still had, through income from its London estate, Foundationer places in the two-day houses. I thought this was fantastic. I remember saying to one of the governors: “This school was founded by Lawrence Sheriff, a grocer, as a free school for the people of Rugby. Why don’t we create the boarding equivalent?”**

**This was radically different from the Foundationer model for local day pupils and we decided to call it the Arnold Foundation, rather than the Rugby Foundation. The name pays tribute to several well-known Arnolds in the history of Rugby School, including Dr Arnold and also Matthew Arnold; this gave it even broader appeal amongst the Rugbeian community. We needed to make a bold decision to stop fundraising for capital projects, to make this our entire *raison d’être*. And I said that we needed to be the first boarding school to reduce the value of scholarships to 10%. So, in 2003 we had a big concert in Symphony Hall in Birmingham, and we launched the Arnold Foundation.**

**This is all to do with authenticity. This would resonate with you and with Manchester Grammar. These schools were built on the theme of meritocracy. And I don’t think there is anyone who would disagree that we should be encouraging meritocracy.**

JC: So, you came to this vision early in your time at Rugby. How did you get from this vision to making it happen?

**PD: I knew at Rugby that advertising wasn’t going to get to the right people, particularly when boarding is a hard thing to sell, because you have to demystify the institution first – even though Hogwarts has helped enormously! So, we set out to form meaningful relationships with charities and schools who were dealing with issues of social exclusion and under-achievement on a daily basis, many of whom also had historically charitable missions. Rugby School had the Rugby Club (founded in 1884) so I went to visit them in west London, which at the time had the biggest disparity between the rich and poor anywhere in London. They told me about a new**

**charity opening up at a nearby church, which is where I met Rachel Carr who is still the chief executive of IntoUniversity today. We came to an agreement that they would recommend students who would benefit from boarding, whose potential was being limited by constraints outside their control. That is how it all began. Soon afterwards, I was introduced to Ray Lewis at the Eastside Young Leaders' Academy and those two relationships proved to become the building blocks of the success of the Arnold Foundation.**

JC: And it is vital to have the pupil supply to make the best use of the funds that you raise or provide.

**PD: Yes. That isn't rocket science but building relationships takes time. And your word, authenticity, is key here. We had to demonstrate to everyone that we were serious, that the additional layers of pastoral care and extra tutor support we put in place for bursary pupils would really make a difference. We also developed a scheme of parent ambassadors, to help spread the word about what we were doing.**

**Many aspects of what we did came from my own experience. I was sent away to school at a young age and owe an extraordinary amount to the benefactor who supported my schooling by providing a bursary for me. I would come home from boarding school to stay with my mum, who lived on a council estate in Scotland, where she still lives, so for many years I lived what you might call a 'Jekyll and Hyde' existence.**

**At Rugby, we commissioned the National Foundation for Educational Research to measure impact because it was essential that we measured the results of what we were achieving and shared them with everyone along the way. Overall, the most important thing about what we were doing is the 'ripple effect'. You cannot underestimate the significance of bursaries; it does not just have an impact on the individual but also on their family, their community, the charity that is working with them and the school. We made it perfectly clear that you never forget where you come from. So you go back and what you have achieved influences and inspires people back home. One of the greatest sources of pride for me is that some of the Eastside boys have gone back home to help out, volunteering and acting as mentors. That is how to really make a difference.**

JC: And these students never forget their past and that makes them immensely valuable members of this meritocratic world.

**PD: I see myself still as an outsider. I have that unusual perspective, as David Goodhew does. You are shaped and conditioned by that so, when I am teaching A-level history students, I say that you can rebel as much as you like but you are still a product of your upbringing and education. The great thing is that a liberal education gives you insights and windows into the world, tools to think with.**

**The Arnold Foundation was a success, as the numbers prove, but what was absolutely fascinating for me was that 71 schools came to see me for advice on bursaries. I was speaking frequently either to heads or to governing bodies. In about 2010/2011 we said: "Why don't we see if we can get them together, rather than see them in groups?" I recognised then that there was a real interest, a real desire to do this. So, very**

**generously, McKinsey did some pro bono work on whether we could scale up the Arnold Foundation and that is how SpringBoard (now known as the Royal National Children's SpringBoard) came into existence. SpringBoard is based completely on the principles of the Arnold Foundation and it is a stand-alone charity with independent trustees, independent of Rugby School. The striking thing is that this is a rare initiative in the independent sector in that it has cross-party support, because it is a genuine alliance between independent and state boarding schools. That is what has been the real success. Both IntoUniversity and Eastside are key partners, but there are many others across the country. I have been delighted to see all these organisations develop and flourish and have been privileged to have been able to play a role in helping them make a difference to so many young people's lives.**

JC: SpringBoard is another chapter of my book. Can I go back a bit? You have your launch at Symphony Hall and you have built these vital partnerships. Now you need funds. What is the response of the Rugby community, the alumni, parents, to bursary fundraising?

**PD: There was some scepticism and doubt as to whether this would work. And, of course, the traditional view is that parents will only give to capital projects because they give to things that benefit their own children directly, whereas alumni do the opposite. This is simply not true. It comes back to the authenticity of the message. If what you are doing is genuine, people will be convinced, and I was at a huge advantage because I could tell the story of my own upbringing to help convince everyone. That made it very passionate and very personal. But also the other strand, and this applies as much to Westminster as it does to Rugby, is the relationship between the cause and the school's foundation. If you remind people of why Rugby School started or why Westminster School started, that has great impact. At Westminster, the Elizabethan Charter on which the school was founded could not be clearer: 40 poor scholars being educated for the greater good of the state. I rest my case. Because in there are the two key aspects to what is still at the heart of the school today, meritocracy and service, both of which resonate with every generation of Westminster.**

JC: Do you sense a change in attitudes in the independent sector?

**PD: I am encouraged by what is going on. When I look back to when we were young heads, we did not talk about these matters. The most heartening thing now is this. Recently, I showed our new video of The Westminster School Campaign to the pupils and they burst into spontaneous applause. You could feel their sense of pride; their response was very moving. Lots of pupils came up to me at the end and asked: "How can we get involved?"**

JC: However, Westminster is not in the same situation as some schools of the north where bursary pupils are making the schools stronger academically as well as in every other way.

**PD: We do have a problem at Westminster and this is really important for the story. Westminster is arguably the leading academic school in the country and you can't compromise academic standards. Our top challenge is finding new bursary pupils. At the moment, we have approximately 5% on full bursary support from 11 to 18. We recognise the difficulty of passing our entrance exam, so we have launched an academic enrichment programme called Platform, working with Year 5 pupils from a**

whole range of primary schools across London. Each school recommends one or two pupils, and we run classes for them on a Saturday morning in our Under School using Under School and some Great School staff. We launched with a pilot programme two years ago. Three of those pupils got into the Under School the following September on bursaries. In year two, we expanded it to be co-ed, whereas in year one it was for boys only. It's really exciting that lots of the participants have raised their aspirations, whether they end up applying for grammar schools, other independent schools or Westminster School. They are under no obligation to apply for Westminster, but we simply want to signpost them and their parents towards new opportunities they may not have realised would be a possibility before they came on Platform. The primary school heads we have worked with could not have been more enthusiastic about the impact it has had. We have also created an online portal so there are year-round resources to support the pupils, alongside the face-to-face lesson time.

JC: The King Edward's Foundation had a very similar initiative, Opening Doors, and there were concerns about the attitudes of junior schools but it turned out those concerns were entirely unfounded.

**PD: The other thing that is clear is that the overwhelming majority of heads, in whatever sector, want the best for their pupils. I think back to my first headship at Solihull and the enrichment programme we created. In the beginning, there was hostility with a capital H, but by the end, every single primary school sent somebody on a Saturday morning.**

JC: That was very early on in the story of outreach. I remember taking it over from you in 2001.

**PD: Yes, we had no money for it. So, I fundraised from local business and the Solihull Community Foundation. I suddenly realised that this was the future. That is the progenitor of what there is today and I learnt from that. In January 2019, we launched Platform Plus, which is aimed at Year 10 pupils, to raise aspirations and show them new opportunities. We are doing it in partnership with Generating Genius and Tony Sewell. We are running it as a pilot this year and then we'll develop it. So, to go back to the supply issue, we are very conscious of the need to address that.**

When we launched on 9 October 2018, it was the 371st birthday of Yale and now Yale has so many billions. I am not exactly setting that out as a target but I hope that one day, in time to come, what we started today will have begun the process of returning Westminster to its roots. It is going to take a long time to build an endowment. Unlike other schools, we don't already have one for means-tested bursaries. We are asset-rich in having very expensive real estate but we never built up an endowment dedicated to bursaries. What really resonates with the Westminster community is the idea of a school of individuals. Westminster is based on individualism and a liberal education in a real sense, so they question and challenge everything.

So, we are just embarking on a long-term process. Before we launched, we had raised just under £5m. There has not been a single dissenting voice and it has been really exciting. The biggest challenge for us will be finding the pupils who can really benefit from the opportunity.

JC: However, bursaries at Westminster aren't the only game in town for you.

**PD: Indeed. The other reason that I came to Westminster was because of Harris Westminster Sixth Form. We are offering a Westminster education, free of charge, in the state system. It is an academically selective free school. It started the term that I came here, September 2014, and the key thing on admissions is that more than one-third of the school are on pupil premium. For Latin, Greek, German, theatre studies and music, Harris Westminster pupils come here to Westminster School to study. We teach about 40 children from the state system here free of charge and our teachers also go over there. It works because it is two minutes away and they are on our timetable.**

JC: As far as I can see from other attempts to make this work, proximity matters.

**PD: Of course, it does and I have said this to the secretary of state, whose office is looking down on us, situated very close by. Not every school has the resource for an academy or a free school but, if it is to work, rather than just paying lip service to it, you have to be in touching distance. Partnership works on the basis of contact with people who you can walk to. In Rugby, we created partnerships with people who were local and for our partnership here with Harris Westminster, it is easy because of the geography. The motivation and approach has to be authentic. It cannot be patronising. It cannot be imperialistic. I have learnt from my colleagues in the maintained sector, as I hope they have learned from us. This is a genuine two-way thing.**

**Our partnership with Harris Westminster, for me, has been a fantastic journey and the fact that they are now rivalling most independent schools in terms of Oxbridge places within their first six years is brilliant. This also is something that really connects us with our charitable purpose and service in the real sense. We impress on every pupil the importance of civic engagement and volunteering. I want it to be part of their DNA so that, when they go to university, they all do it and, when they go to work, they do it. In working with IntoUniversity, what has impressed me over my 13 years' involvement is the way that corporate social responsibility has become an important part of the DNA of all the big London firms. We get fantastic people volunteering as mentors. There has been a real sea change and there is much greater willingness to help.**

JC: So, there are some reasons to be cheerful?

**PD: For me, I would really like there to be more joined-up thinking from government. Education is a long-term investment. Bright young children all have the potential, which is being limited through no fault of their own. Our schools can do their bit for social mobility by providing a lifeline in terms of transformation, but also through meaningful and impactful partnerships. Most schools have come to realise that it has to be done for the right reasons. One example is that around 100 schools are accredited with SpringBoard now and that is something to celebrate in such a short time. We must keep emphasising to people that independent schools can be an integral part of the solution. They are not the problem. We all need to work together to help all young people.**



### Lucie Kennedy (LK), director of development

JC: Could you talk to me first about your own career and how that led you to the role at Westminster School?

**LK: I feel very strongly from a personal perspective about what we are working towards here at Westminster School. I have benefited from a mixture of both private and state education and I am lucky that both were excellent. I am very passionate about all that comes with a good education, how it enriches your life and how it helps you through life to make a difference.**

**My career background was initially in conference production and marketing, and it was only after completing an MBA 10 years ago that I went into the world of development in the education sector. In terms of professional skills, I had built up a lot of transferable skills through PR, communications and corporate sponsorship that apply to this field of development. My first role in this sector was as director of development and communications at Chetham's, encompassing a medieval library and Chetham's School of Music. After that, I came to London for a new challenge and headed up development and communications for a growing youth and education charity called City Year UK for a couple of years. Through that role, I learnt a lot about social mobility and corporate sponsorship, working with a network of partner schools tackling educational inequality through volunteers giving 'a year of service'. When the role at Westminster School came up to launch a major new bursary appeal, I knew it was the right next step for me. I had heard about Patrick Derham's work at Rugby and through IntoUniversity and SpringBoard and thought it would be a fantastic opportunity to widen access to a superb school with very high academic standards.**

JC: Obviously the Westminster project has high ambitions and a high profile, not least with Patrick. How far down the track was the project when you arrived?

**LK: When I arrived in March 2017 the governing body and Patrick were keen to lay the foundations for a high-profile bursary campaign, but the first building blocks were yet to be put in place. They had been recruiting to get key positions in place within the development office. The central focus of fundraising was the annual telephone campaign for the *Fund for Westminster*, an annual fund. At that stage, the school knew it wanted to create a new endowment dedicated solely to means-tested bursaries, but it was not yet in existence and a lot of planning and groundwork needed to be put in place.**

JC: So, what were the key steps you took from that point?

**LK: When I arrived, I plunged straight into a telephone campaign which eclipsed all other work for the first three months or so. The pre-telephone campaign machinations were in play and every member of the team was new apart from the head of alumni relations, who had been there for six years. I began by getting up to speed quickly with the task in hand of the telephone campaign, whilst assessing the resources in place and turning to the head of alumni relations for a great deal of context and background about all aspects of how the development office had operated. There had**

**been a lot of staff turnover, so her longstanding knowledge of the school and the development office was crucial for overall continuity.**

JC: This doesn't sound like a gentle way to start.

**LK: It was in many ways a baptism of fire but I think that is often the case, especially in a situation with new members of staff inheriting systems and processes from previous team members without overlap. The positive side to it was that I had to learn about every aspect of how the development office operated and that has stood me in very good stead over the time that has followed.**

JC: So, since you have seen it and built it, can you tell me the main pillars that needed to be put in place?

**LK: The first priority was getting the right team in place, which to a certain extent is an ongoing priority – both in terms of identifying the right roles that are needed and then ensuring that each team member is set up to succeed once they have been recruited. This will always be a dynamic process in a central London school where many team members are in the early stages of their careers and not looking for a job for life. So it is important to establish a structure that works and to look for ways to improve both attraction and retention.**

**Aside from the human resources, we also needed to pay attention to technological resources. Upgrading our database and introducing an online alumni platform helped us to provide a better service to all our alumni.**

**Relationship building was a top priority from the outset because a campaign directed towards current and former parents and alumni will only be successful if everyone is brought on board and understands what the mission is and how they can contribute. I have spent time strengthening the development office's relationship with the Elizabethan Club (our alumni association), the current parent committees on board schools (the Under School and the Great School), the Friends of Westminster (our committee for former parents), staff across both schools and many individual donors who were in urgent need of some stewardship.**

**In parallel with relationship building, the communications piece has been imperative. Many people do not instinctively understand the role of a development office in an independent school, or why we are a charity and need to raise money and what in fact this team of people actually does. So it was important to spend time demystifying the world of the development office and bringing lots of different stakeholders on board, primarily through consultation and strategy sharing, to help to bring us together as a united front. There are so many components of this process that it will never be completed, but I certainly saw it as a priority from the start of this role and have made a great deal of headway.**

**We also established a development board, with a combination of different representatives from the Westminster community on it, so that we had a group of ambassadors who could give to support the campaign and encourage others in their networks to give too.**

**Some basic building blocks of communications needed to be put in place. So following a round of focus groups, I got the case for support in place that would be projected through a new film to encapsulate the ambitions of the bursaries campaign, accompanying literature and a central 'support us' section of the website for both the Under School and Great School.**

JC: Can I rewind a little. When you arrived, how strong was the communication system with the alumni?

**LK: That was, and continues to be, very strong. There is a busy schedule of events throughout the year for alumni, including a very well-attended summer event and the annual Elizabethan Club dinner. Lots of house societies and alumni sports clubs organise their own smaller events too, which our department helps to facilitate, all contributing to a vibrant alumni community. The fact the development office had regularly asked for alumni details to be updated and had needed to ensure the data was as accurate as possible for the success of around 10 annual telephone fundraising campaigns had also helped a great deal. We are in touch with just over 80% of our alumni, which is not a bad statistic at all. However, until we launched OWConnect.com, a lot of our service to the community had to take place through the development office, and naturally it is now much easier and more effective for alumni interactions, for them to be able to find each other through the online platform; for example to find mentors, work experience and also to see what events we are holding all over the world.**

JC: So, what were the next steps on the campaign trail? There is often a lot of debate about 'the campaign' and, especially, 'the launch'.

**LK: The launch itself took place on 9 October 2018, and I spent the months leading up to it, from before the previous Christmas, gathering feedback and ideas from the community through focus groups and individual meetings; this helped to understand the feelings and the language that the Westminster community would want to see reflected back to them through the branding of the bursary campaign. Initially, I worked with a marketing agency to try to come up with a snazzy marketing brand, but realised we needed to show that this campaign is central to the priorities of the school and feared that a gimmicky name might undermine that. We knew that the launch of the campaign was the start of a conversation with the Westminster community that would last for decades and concluded that we would begin by avoiding a name that sounded like a passing marketing fancy, instead marking it out as being THE Campaign, one that would remain no matter what other initiatives may come and go in the future. There would be new phases when it would need to be rejuvenated and so a more 'catchy' name could be introduced further down the line, once the centrality of this campaign had been affirmed. We were also aware of the amount of 'brand clutter' that a school can accumulate, with many different names of clubs, societies, giving vehicles and campaigns, and for that reason also we decided not to add one more name that was too 'colourful' to the list. By this stage, we had decided that the new means-tested endowment fund would be established as an independent charity and felt that we could give more prominence to that by keeping the overarching campaign name simple. Now that the endowment fund has been set**

up as the Ben Jonson Foundation, named after one of our most well-known past bursary pupils, we are considering developing this into its own fully fledged brand in the next year or so; this will help to draw more people's attention to it and increase the fund as quickly as possible to generate a significant stream of interest to support more bursaries.

The launch itself was a declaration of the school's commitment to provide life-changing bursaries to young people who show exceptional academic ability and both passion and potential for learning, regardless of their financial circumstances. It was not an occasion when we wanted to set a short-term target; we wanted it to go deeper than that, sharing with our closest members of the community the school's ultimate ambition to become completely 'needs-blind' so that absolutely any young person can gain an outstanding education based on merit alone. We wanted everyone to know that it is not about quotas or short-term targets, but that the school wants to radically change the composition of its pupil population so that it is more reflective of society as a whole.

In fundraising terms, this meant that some aspects of a textbook campaign launch were not applied. A typical fundraising campaign would include a quiet phase and would only 'go public' once anywhere between 30% and 50% of the funding required had been secured. However, the full scale of this campaign would be continuing for generations to come and we did not want our initial declaration to be tied to specific figures, as it was aspirational and very much for the long-term.

My arrival at Westminster gave me the opportunity to meet people, to introduce myself. So, I was conducting the quiet phase by telling people that this campaign was coming and asking them to give an indication of their interest and intentions. It was a bit like a feasibility study but, unlike a consultant's feasibility study, I wasn't actually asking people how much they would give. I was developing a more general sense of warmth and both gauging and encouraging willingness to support.

We are now about to launch a regular giving scheme, which will encourage the whole community to make a contribution. We are expressing the campaign's target in terms of aiming to raise "the first £50m over 10 years", which establishes a goal, but without giving the impression that the effort will stop once we have reached a certain point.

JC: When you made your launch, what funds did you have in place?

LK: On the launch night, we were able to announce nearly £5m secured. That came from £3.6m generated through fundraising in the 'quiet phase', both pledges and 'cash in the bank', and £1m we had received from the China schools project. Although not fundraised per se, the income we receive through royalties from China is an important part of the picture because generating revenue to boost fundraising was one of the main reasons why Westminster School embarked on that venture. That night, our top pledger at the time (a current parent and member of the newly formed development board) stood up and told several hundred members of the community why he had chosen to support the campaign and announced that his pledge was £1m towards the new endowment fund, encouraging others to give at whatever level they are able

**to give. He did this sensitively, knowing that 99% of guests would not be able to match the same level of his phenomenal investment, but asking everyone to make a gift that is significant to them.**

JC: How many major donors are there out there?

**LK: There is no doubt that at a school such as Westminster, we are fortunate to have a large pool of prospects, many of whom are able to give very significant gifts. However, that is not the case throughout the community, so it is very important that it is not taken as a given that every member can give at a high level. A few months before the campaign launch, I brought in some fundraising consultants to help us to understand and prioritise our prospect pool better. This has been an extremely useful project, drawing on a combination of externally available information as well as affinity information that was held internally on our database. However, that needed to be expertly excavated and interrogated. The result is a segmented list of several hundred top prospects. This project focused on people who already have affinity with the school, so people who have already given and come to events. It has been an enormously illuminating exercise. There were people there who had given a large gift 10 years ago, but who weren't on my radar at all. It is very difficult to quantify accurately the number of major donors from our entire database of thousands of names, especially those who have had limited or no interaction with previous campaigns or initiatives. This will be a work in progress over the coming years to continue to get to know where our major prospects are, but also to ensure we are communicating to everyone in the right way so that everyone feels encouraged to play a part in this campaign and make a contribution at a level that is right for them.**

JC: You've mentioned your development board. What does that board look like?

**LK: We established a new development board in early 2018 and it comprises the 'home team' of headmaster of the Great School, master of the Under School, bursar and development director, supported by the development manager, with members of the Westminster community who are Old Westminsters, current or former parents. There are two governors on the development board, both of whom are alumni and one of whom is the chair of the school's finance and general purposes committee, creating a useful link between the two. The development board also includes the chairman of the Elizabethan Club, because we wanted to make sure that our alumni association was a close partner in this major fundraising focus. The development board is chaired by an eminent Old Westminster, which we hope will send out a strong message to the alumni community and help encourage their support.**

**All of the external members of the development board have pledged to the campaign and that was part of an explicit brief that they would give a donation that was significant to them. This will help them to encourage others in their network to give too. It is this ambassadorial fundraising role that is paramount to membership of the development board, as it is a working group rather than acting as purely a sounding board, although they do play a valuable role offering advice and recommendations on all aspects of the strategy and implementation of the campaign.**

**Meetings are held termly and timed to be in advance of the finance and general purposes committee and governing body meetings, so key updates and recommendations from the development board can be fed into core school governance meetings to inform decision-making.**

JC: In the north, the majority of donors to independent schools are alumni. Is this the same at Westminster School?

**LK: At Westminster, alumni giving used to be around a third of the number of donors and a quarter of the amount of income raised, but since the launch of The Westminster School Campaign, both of those numbers have increased to closer to 50%. The rest is a mixture of current and former parents. As a constituent group, current parents give the largest amount of money collectively.**

JC: Could you describe where you are now?

**LK: The next top priority is to implement a recognition and stewardship scheme that we have been planning over the last few months. I want to ensure we have an embedded approach for systematic recognition of gifts, from the future and the past. At the moment, we've got some names on the wall in our sports hall and we have the yard stone carvings, but we would like acknowledgement of gifts to be more visible to the Westminster community.**

**Before Christmas, we will be launching a new regular giving scheme which encompasses all donors giving regularly at any level, no matter what the donation is for. The communications will be focused on The Westminster School Campaign, but it is important that everyone who supports any aspect of the school's funding is embraced. We will be getting in touch with everyone who is already giving regularly, many of whom might have been giving for years without much acknowledgement of their generosity, and welcoming them into the new scheme. This summer, just before the end of term, will be the first annual 'Celebration of Giving' drinks reception for donors giving at any level too; for the first one, we will be inviting all donors from the last five years to thank them and celebrate their philanthropy. In the future, we may turn it into donors from the previous year only, depending on attendance. In the next couple of months, we will also be finalising a couple of high-level tiers of recognition for cumulative giving.**

**As well as working harder to encourage a broad culture of giving throughout the external Westminster community, we are also aware that there will be many staff members, internally, who don't know what the campaign is all about or how it is progressing. So next on the list is to spend more time talking to colleagues and to put in place a termly update for the school.**

**Also, on the community giving front, we want to revamp our legacies scheme and encourage many people to give through a bequest, especially if giving at the current time is not possible. We have the A. A. Milne Society, named after one of our most generous alumni benefactors, which has a membership of around 200, but we want to increase that and make sure as much as possible can be directed towards the new**

**endowment fund for bursaries, so legators are helping to ensure a more diverse pupil population at Westminster for future generations. Next year, we will be clarifying some of the wording around leaving legacies, factoring in the campaign, and we will carry out a comprehensive rebrand of the scheme.**

**In terms of major gifts, I am working hard with the development board to find more hosts of cultivation dinners. They have been the trigger for some wonderful five- and six-figure gifts this year, so we need to maintain a steady stream of these dinners in the hope that from each one we might secure at least one major gift.**

**Social media in general is a continual challenge, to have the time to find or create the content to maintain a focus on the campaign. Our communications resource is one member of our senior management committee, who is also director of communications, supported by his secretary, who also doubles up as communications coordinator. Around the campaign launch itself, my department shared case studies with communications to be posted, including profiles of Old Westminsters who were on bursaries. Many of these came as a result of an excavation exercise I undertook, looking through old financial records to find bursary pupils of the past and inviting them to become voices of the new campaign. This has been a rewarding exercise, unlocking much goodwill from alumni who want to help. However, to a large extent, what we are doing is very new, with a completely fresh approach to recruiting and supporting bursary pupils, so my focus will increasingly be on the voices of more recent bursary pupils who have come through the new scheme.**

**In terms of media coverage, we didn't proactively court the media but I am delighted to say that the media coverage has been fantastic. It has been very positive about the principles behind what we are doing. The time and energy that Patrick Derham continually pours into social mobility, through his involvement with a number of charities and his participation in debates and conferences on related themes, has been a key factor in the media coverage we have received.**

JC: At this stage, what role is Patrick playing in terms of meeting potential and existing donors?

**LK: Patrick and I meet every week officially, with the bursar, and we both pop into each other's offices several times a week to share updates on an ad hoc basis. This means that I can flag it up with Patrick when a major prospect is visiting the school and we can discuss whether Patrick should drop into the meeting or whether we should arrange a meeting more formally in his office. There is no one set approach because every individual donor and prospect needs to be handled differently. Some prefer the formality of a meeting with the headmaster, whilst others would prefer to be more low-key about their philanthropic support; it also depends on the level of donation. Some meetings come through Patrick and, again, we will discuss if it is best to bring me into the arrangements and at what point he will officially hand over the relationship to be managed by me.**

JC: I understand Patrick recently visited the USA. Did that trip have a fundraising purpose?

**LK:** Yes. We hosted an alumni event in New York, which we tend to do every October; a group of our pupils visit a number of US universities at that time of year, so sometimes we will host an event combining alumni from the New York area with our pupils who are out there at the time. At the most recent event, it was about 50/50 pupils to alumni, with a limited total capacity of around 70, in the office of one of the directors of our 501(c)3, our US Foundation. It was a brilliant opportunity for Patrick to be there so soon after the UK launch of the campaign, to be able to play the campaign film and incorporate our major plans for widening access as part of a broader update on all things Westminster School. There were actually some alumni wiping away tears when watching the film; the response was incredibly enthusiastic to what we are doing – they were very proud and supportive. So, yes, that trip was about Patrick being available to meet a good number of alumni around the main event itself, always with the hope of a fundraising purpose, but we are still very much at the relationship-building stage, so a lot of it was general alumni relations.

JC: At this stage, are you looking for regular giving or long-term endowment?

**LK:** We have had many discussions about how to steer donations for this campaign, whether to the school bursary fund by default for all community giving or towards the endowment fund by default. The endowment fund is the key differentiator for this campaign, in comparison with the bursary fundraising of the past, and it needs to be quite sizeable before the amount of interest it generates can represent a meaningful income stream. So, in answer to your question, it isn't so much about regular giving versus long-term endowment (because they are not mutually exclusive), but more about whether we want donations to meet the immediate need of bursaries versus investing donations in the endowment fund for the future. Ultimately, most donors have their own preference about which aspect they would prefer to support. From a management perspective, we know that even though the aim of the campaign is to create an endowment, we need to be careful to encourage expendable donations that can meet immediate bursary funding needs. So general community fundraising will go into the school bursary fund by default but major gifts will be steered, considering the personal priorities for the donor and the level of need at that time. The finance team briefs me to help inform me on our current bursary needs when soliciting donations.

JC: What about events as part of this process?

**LK:** We are making sure that for regular events that are always in the calendar, we see how the campaign messaging might or might not be able to be incorporated. There are some alumni events where it isn't appropriate to have any form of fundraising messaging; however, it can often be possible simply to have some leaflets available for those who are interested, or for a speaker to refer to the momentous date of the launch on 9 October 2018 and all the school is doing to widen access.

I have mentioned the importance of bringing the whole of the Westminster community together behind our campaign. In addition to the new annual summer drinks reception for donors ('Celebration of Giving'), we will also this year be hosting a one-year anniversary of the campaign launch, to which every member of the



**community is invited on a ‘first come, first served’ basis; this will be for staff, parents, former parents and alumni, to hear about the progress of the campaign and plans for the future as it evolves. We will include at least one former bursary pupil voice.**

**At the major giving end of the scale, one development board member stepped forward before Christmas, with his wife, to offer a series of cultivation dinners for 15-20 people. I mentioned these earlier, and they have been working extremely well in terms of giving us a reason to ask people for donations and also progressing expressions of interest that might otherwise be more difficult to develop towards a conclusion. Other development board members are now following suit and also other new donors are offering to host events.**

**Our overall framework is to host these small dinners for high-level prospects but also to have two larger types of events: a drinks and canapés event for 50-60 people held usually externally and the largest community-type events of several hundred people at school. The two larger formats of event are: a) to ensure as many members of the community as possible receive an invitation, but b) to serve as a filtering process for people to self-select and step forward, showing their interest in what we are doing; that helps us to be more targeted when we select who to invite to the smaller dinners where there are hopes of higher levels of giving.**

**A combination of these three formats of events will be crucial to help us maintain momentum, keep spreading the word and continually build our pipeline of potential donors.**

JC: Is the sponsorship of individual pupils by individual donors something that you are doing?

**LK: Our approach to this aspect may evolve and we are monitoring feedback, but initially we are not making direct links between donors and beneficiaries. There will be a detailed matching of donations to bursary pupils behind the scenes but not one which each donor will be made aware of. There are several key reasons for this. For example, limited team resources; individual reporting to donors would be very time-consuming, so for the time being we would prefer to report in an aggregated way to all donors. Additionally, it is made clear in most of our major gift agreements that donations to the campaign are fungible and divisible, which means that one donor’s seven-year bursary support might fund one pupil one year but it might be split across two pupils the following year; we feel it is important for the school to have the flexibility to be able to do this.**

JC: Does this initiative have a separate trust for these funds and only these funds?

**LK: A new charity where the endowment fund is held has just been established with the Charity Commission and its trustees will be a mixture of school governors and independent trustees. It was important to some of our highest donors that we separated this endowment fund by creating a new charitable entity.**

**We have some gifts that have been ring-fenced for the endowment fund, to the tune of several million, which will be transferred into the Ben Jonson Foundation now that it has been set up. From now on, donors will give directly to the Ben Jonson Foundation if they wish to support the endowment fund.**

JC: How does what you are doing relate to the existing alumni and parental organisations?

**LK: Our alumni association (the Elizabethan Club), the parent committees of the Great School and the Under School (WSPC and WUSPA) and the committee of former parents (Friends of Westminster) are all key stakeholders in the campaign. While it is not at the heart of their own reasons for being, it is crucial for the success of the campaign that they are all made aware about what is happening and that we look for ways to get the message out about the campaign through their networks and activities.**

Having the chairman of the Elizabethan Club on the development board provides a very useful link and one that serves both the campaign and the Elizabethan Club committee, because a closer understanding of each other's priorities and endeavours helps everyone. In parallel with that, I go to as many Elizabethan Club committee meetings as I can; that helps me to build strong relationships with them and to get to know what they are working on and what matters to them. The one agreement I struck up with the chairman of the Elizabethan Club when I began at Westminster was that I said I would never surprise him. If I would like to get the word out at an alumni event, he won't appear and find billboards and flyers he wasn't aware of, and I will always take the steer from him or other organisers of an alumni event on what they are happy with and what is most appropriate. I also shared my own strategy for my department with him in draft form, giving him the opportunity to offer input, before I shared it more broadly. These elements have all helped to build trust and a strong working relationship, as we are all working together to benefit the school and our service to the community of Old Westminsters around the world.

I have met with the parents who lead the two parent committees to ensure they are well-briefed on the campaign. I am in regular contact with WUSPA, the parent committee for the Under School, who have been incredibly supportive. When they fundraise for charity at their large community events, they often include bursaries at Westminster as one of the charities they support. For example, they raised nearly £15,000 just for Westminster bursaries last Christmas when we were one of three charities receiving a portion of funds raised. That is phenomenally helpful and a principle that really works, as it offers the boys' and their parents the ability to select charities they believe in, outside of their own school, but it also ensures that everyone is also behind what we are doing 'at home'.

The Friends of Westminster, the committee for former parents, are actively looking at how they can generate more income to support bursary fundraising at the moment. They have also recognised the increasing demands on the development office since the launch of The Westminster School Campaign, so they have appointed their own treasurer and secretary, which means my team no longer fulfils these functions for them. They host a couple of events a term for former parents and we are working

**closely to look at how messaging from the campaign can percolate through what they are doing.**

JC: So, in your own mind, what is your next objective in quantum terms?

**LK: The next immediate step is launching the regular giving society, The 1560 Society, named after Westminster School's founding year. We will be expressing our goals, not just in an overarching aspirational sense, but also in terms of a concrete target we want to encourage the Westminster community to help us to reach. It will be to help us with the first phase of a much longer and larger initiative that will last for generations. By Christmas, the new recognition scheme will have been established and the mechanics for the higher-level tiers of cumulative giving will also be in place.**

**Another major current project is creating Westminster School's first Annual Giving Report, which will focus on the campaign, but will celebrate and recognise the support of donors towards all aspects of the school. This will be distributed in the first term of each new school year, covering the previous year. Crucially, it will share highlights of philanthropy at Westminster and a core focus will be on the progress towards and impact of The Westminster School Campaign for bursaries.**



## Chapter 10:

# Royal National Children's SpringBoard Foundation

(Royal SpringBoard)

Ian Davenport (ID), chief executive

JC: Could you talk me through the origins and development of Royal SpringBoard?

**ID: SpringBoard (The SpringBoard Bursary Foundation) started in September 2012; it sprang from the principles of the Arnold Foundation at Rugby School. Patrick Derham, the headmaster at the time, initiated a bursary programme to answer two specific questions, which most boarding school heads had faced in the past. First, how do you find genuinely deserving bursary children who merit 110% awards – the 10% being the extras – and, secondly, how do you look after them in the best possible way to ensure success? He built a model that saw Rugby School develop close relationships with organisations that are based in communities where there are a significant proportion of deserving children, many of whom were eligible for free school meals. These community organisations, we call partners, still underpin our model; they recommend the children and they provide an understanding of the pastoral and the social context.**

**Given the success of the Arnold Foundation model, he thought it might be scaled up nationally; the Rugby School governors were fortunate to be able to work with McKinsey on a pro bono basis to explore this ambition. I was asked to take this project forward as founding CEO and develop it into a national organisation. We started with nine schools and 17 children. We now work with 120 schools and have, since 2013, helped just short of 800 children, with 450 currently involved in the programme.**

**In 2017, SpringBoard merged with the long-established and well-respected Royal National Children's Foundation. There were natural synergies between the two organisations; both organisations aimed to place disadvantaged children in boarding schools. We had differing operational models, but by putting the two together, the combined structure is more robust.**

JC: And where did the money and support come from in the beginning?

**ID: We started with some seed corn funding from nine donors, one of which was the Garfield Weston Foundation; this enabled us to build the model for a year. In this first year, we worked closely with two partners, Eastside Young Leaders' Academy and IntoUniversity, both of which had worked with Rugby School. I also drew upon the advice of John Franklin, the then headmaster of Christ's Hospital, the well-established leader in this area. John was kind in giving his time and it helped me develop our processes and understandings. So, whilst Royal SpringBoard was rooted very much in the Rugby model, it was augmented by a number of other schools. I was also blessed with a supportive and enthusiastic group of trustees.**

JC: To do this, you need the pupils through the partner organisations, you need the schools that will accommodate the children and you need the funding to support it all. Could you talk me through your partner organisations?

**ID: Once we had developed an outline model, we needed to build our partner model. Therefore, it was important for me to appoint someone with a strong background working with disadvantaged children to take a lead on this. Fortunately, we were able to appoint someone who had experience with IntoUniversity and that was the first important step. Their most significant task was to locate and develop more partner organisations. This has been a really interesting journey for us. Alice, as in Wonderland, guided us when she said: "If you don't explore, then you'll never discover." This advice has underpinned our work in all areas. The first new partner was our inner-city Liverpool partner; this strong relationship has produced a good number of pupils who have moved to boarding schools. In December 2012, the CEO of Liverpool Hope read about the launch of SpringBoard on the front page of the Metro outside Liverpool Lime Street. He had a background in helping to regenerate Liverpool, and for him, raising youth aspiration was as important as developing the physical infrastructure. So, he founded his own charity. By chance, he had also written to Tony Little at Eton. And we triangulated the process. From that one phone call has come a growing and productive relationship; some pupils from Liverpool and Blacon have gone to Eton and a number of other schools, including Marlborough, Sedbergh, and Repton. This partnership has grown significantly: it has spread to Chester and is about to move east to Scunthorpe.**

In order to widen our network, we also started to work with the heads of Virtual Schools; this introduced the idea of placing looked-after children. Virtual Schools met our key criteria; they know the circumstances of the children; they provide pastoral support and they help build meaningful relationships with the schools. They are charged with overseeing looked-after children and their educational welfare. The concept of the Virtual Schools and the rollout was instigated by one of my founding advisors, Lord Adonis, when he was the schools minister. Each local authority must have a Virtual School and the head is responsible for running, parallel to the mainstream schools, a system for the benefit of looked-after children. We were most fortunate by being able to work with Bede's School in Sussex, which had already built a framework; so, we created pilot schemes and expanded on this.

JC: And what about the schools that take SpringBoard kids?

**ID: Each school has to be accredited by Royal SpringBoard to assure us that they 'get it'. In the first instance, I visit the head of each school. Part of the accreditation process is a self-assessment process; most boarding schools have said to us: "We want to do it properly so just tell us what to do." Schools have been fantastic; most have the necessary structures and are always prepared to adapt. One or two needed some technical adaptation, ensuring they were doing things in alignment with our way. Schools are trained regularly. I was very keen on the dynamic element to the accreditation process; again, demonstrating that their commitment was great. We have an annual training day when we bring everyone together; last year this was held at Dulwich, the year before at Christ's Hospital and this year it was at Rugby School where we drew together a hundred schools, alumni, partner representatives and staff.**

**Obviously, it goes without saying that all boarding schools have to be safe and not have any compliance issues.**

JC: The partner organisations are vital but how else can boys and girls find themselves in this system?

**ID: We now have two mechanisms for children to be placed in boarding schools. The first is through the partner organisations and the second – since the merger with the Royal National Children's Foundation – is schools, parents/carers and local authorities can now apply directly to us. We then place them into schools after detailed due diligence. What does this look like? The pupils do a GL CAT4 verbal and non-verbal reasoning test to ascertain their academic strengths. Because we have such a wide cross-section of boarding schools, we can safely say there is a boarding school for every child, providing they are right for boarding. We won't take the risk of them floundering. In the same way, we are not cherry-picking but we want to make sure the child academically flourishes. The pupils also undertake a mental wellbeing assessment pioneered by the STEER organisation. We interview every child, so we get an understanding of their character. We also ask for a report from the parent or the partner organisation and from their previous school. Every child has an opportunity to visit a boarding school because we realise that they have little idea of the reality of boarding schools. When this process is completed, we suggest what school would be best suited for the child. We send all the paperwork to the school ahead of the child knowing which school we are talking about. Typically, it's regional but not always. The school will review and decide whether they can offer a place. So, we do a huge amount of work ahead of time. With six years' experience, we can answer most questions. We will place 120 pupils this year. We work with state boarding schools as well as independent, and they are equally great. We are about boarding, not just independent boarding.**

JC: Matching supply and demand and ensuring that young people are going to the right school is a big task. How big is your team?

**ID: The team comprises 10 of us; some work part-time. Most schools are very good at looking after these children. But, one thing we have to assure ourselves of is that their academic confidence won't drain away. Some are really bright – why shouldn't they be? – and some are less bright. The matching process is very thorough. We spend a lot of time trying to understand them as individuals. We tread very carefully, we have a tripartite relationship – pupil, school, us – and we have a memorandum of understanding with each school that says what the school's and our expectations are.**

**Initially, the biggest issue we faced was the concept of 'extras'; we quickly learnt that it's not just a monetary sum. It's also a philosophical issue. Many of our parents have never come across an 'extra' before. They worry about all the things they won't be able to do as their child progresses through the school, so we detail all of this in the memorandum of understanding.**

JC: This is a major undertaking and a major responsibility. How do you decide whether it's working or not?

**ID: We have a sophisticated impact assessment. On day one, I realised that we needed to have a proper impact assessment; we worked with the National Foundation for Educational Research who pioneered it for us: it was a five-year study with annual reporting. Part of the advantage of being in the Royal SpringBoard network structure is that every school contributes and therefore can use this report; the results are unrelentingly positive, qualitatively as well as quantitatively. This is critical to the sector because we can aggregate the data. The data of individual schools with small cohorts cannot do the same thing.**

JC: And you accumulate inspirational anecdotes and heroic tales.

**ID: We are able to prove the benefit of what we are doing to the child, their peers, the teachers in the school and the local community. We work with 120 schools: some junior schools but mainly senior schools, some co-ed, some not, north, south, state and independent boarding. We can say we have a 93% retention rate and we can say that 90% of the free school meals children on our programme achieve five 5 A\*-C at GCSE. The percentage of looked-after children who get 5 A\*-C at GCSE nationally is 12% and our percentage for these children is 88%. We are still open to the charge that this is a relatively small sample, but we are not a small sample if we are working with 120 boarding schools.**

**In addition to its primary purpose of measuring whether the programme is working for the child, it is also crucial for fundraising purposes. All financial supporters of Royal SpringBoard wish to know that their donation is underpinned by evidence, both quantitative and qualitative.**

**Why is this important? Because when we started, I had an ambition to build a holistic bursary charity with a strong social mobility element for the benefit of the child, the sector and the individual school. We were more than a grant-maker; indeed, this was not even one of our primary functions. Our 'whole child agenda' emphasises the before, during and after aspects to the journey; we had to do something for the boarding sector collectively that would aid and influence each individual school as well as show a collective strength. I realised the more we could do for the benefit of the whole sector, the better it would be for them and us. We are able to say to all boarding schools: "Join us and share in the collective success; use our influence." We are going to shout very loudly about all the great things the sector is doing to show it is not just a few big names that can do this.**

**Also, with experience since 2013 of 800 pupils, we can talk more persuasively about the issue of social mobility. Of course, each individual school has an impact on social mobility but given the relatively few children in each school, it is hard to move the dial. Too often, people see social mobility as, 'How are we going to take people from social economic class D or E and push them up to C2 or B or A,' but actually there is also a social mobility impact caused by Royal SpringBoard children, enthusing their middle-class friends about the complexities of societal issues.**

JC: All the schools who believe in this say that every young person is enriched by the diversity of pupils. People want to teach at such schools; parents want to send their children to such schools precisely because those schools are doing the right thing.



**ID: Our social mobility model works because our children and our partners commit to giving back to their communities and acting as role models. Last year's head boy at Millfield was featured on BBC One's *The One Show*. He came from Tottenham and went to Gladesmore School. He returns to the school regularly and acts as a mentor and we've got 25 referrals from Gladesmore, not least because they have seen him.**

**Other individual examples of social mobility are the two boys who went to Eton from our north west partners in Liverpool and Blaenau. The head of their high school, who has just retired, frequently said there was not a street in Blaenau that had not heard of Royal SpringBoard. She believes that the roll in her school was stronger because her school was seen as a school that raises and rewards aspirations. They want to celebrate kids going to Eton. The boys are role models who have gone off and made something of themselves; they come back and encourage their peer group to chase their ambitions.**

JC: So, the success of your SpringBoard pupils is generating demand in those very areas from which you want the pupils to come.

**ID: And the programme is more successful because more parents in their communities understand it. We link current Royal SpringBoard parents with those whose children are going to go into it. There is a sense of collective progress.**

JC: Where do you go next? What are the limits of what you might do?

**ID: We have just launched our second five-year plan. Our first five-year plan worked. We aim to double the number of 110% boarding bursaries in five years' time so we can get to 1,000. We have a waiting list of schools. This plan will involve more schools. Not a huge number but it does require more schools to take more children, and we have to be mindful of the funding element of it. Many boarding schools fully fund the Royal SpringBoard children. We make a financial contribution to state boarding schools and we make a small contribution to other schools. The SpringBoard model going forward in 10 years' time is for the vast majority of our children to be fully funded by the schools themselves who have used Royal SpringBoard as the mechanism to answer the question about bursary provision and inclusivity. Then there is a further question about how you do better in raising funds for bursaries. We know there are schools where donors are willing to fund full-fee places if they take SpringBoard children. Secondly, donors are concerned about the impact they are having on the bursary child's life through the dislocation caused by going to university. The critical thing for us in selecting the pupil is that we do all that we can to make it work – and we do reject children if we think that it is not going to be beneficial to them. Why would we want to make things worse?**

JC: We all know that it is very different for a boy or girl to go off to boarding school rather than go to a day school where they do go home for tea.

**ID: Children are remarkably resilient but it is important we ensure that we, and the schools, understand the context of each child.**

JC: Can I go back to fundraising? At the moment, your places are being funded by a lot of your schools because you are better placed to find those children than they perhaps are. Can you tell me how the fundraising element of what you have done has changed over time?

**ID: The place to start is that all of our children merit 100% bursaries. We measure it and we know that the average family income of SpringBoard parents is between £19k and £20k a year. That's not a million miles away from eligibility for free school meals, which is at about £17k.**

JC: That's not very different from where the Government Assisted Places scheme used to sit or where MGS is in its sliding scale today.

**ID: I am not critical of schools who do things differently – each school has its context – but it is very clear to those who fund us what our model is. We are accessing trusts and foundations and our message is very clear: these are families on low incomes who warrant 110% bursaries.**

JC: So, who were your supporters in the beginning?

**ID: We had nine people, seed corn supporters. I can mention Garfield Weston and the others were enlightened individuals. After a year, we moved into the second phase. We returned to those people with completed objectives: "This is what we said we were going to do and we've done it." We had some key metrics, an objective impact assessment and data on retention rates, even though the data were limited from only one year. This was all very positive. Then the next phase was to go back to them and ask for more and, at that stage, we had a three-year plan. This has allowed us to considerably diversify our funding base. For example, we are supported by the Wolfson Foundation, Credit Suisse, hugely supportive livery companies and some other grant-making trusts.**

JC: What's the spread between sixth formers, Year 7 and Year 9 pupils?

**ID: It is roughly 30% sixth form, 30% Year 9 and 40% Year 7. Interestingly, when we started, there was a general sense from our partners and local authorities that sending 11-year-olds to boarding school was wrong, so we didn't get many of that age. Now we get plenty. That has changed over the years. The schools are excellent at this. We have very few below 11. This is useful in terms of risk profile. We had to build a model where there was a mixture of age groups so we could spread the financial risk over the years. I also knew that we had to put in an objective impact assessment process to measure the effectiveness of the different year groups. The approach to different year groups is the essential element of pastoral care. Year 7s need different treatment to Year 12s.**

JC: At Rugby and Eton, the conversation is about the balance between those two.

**ID: Our evidence, from the cohort of 700 of them, is that if differentiated approaches are used, including in selection, then whatever the year group – Year 7, Year 9 or Year**

**12 – success will follow. Year 9s though are increasingly hard to find because of the dynamics in the boarding school world. It is critical to choose the right child to go to the right school, particularly if you are looking at sixth form. If a child has had a difficult experience at the age of 11, probably they are not going to really embrace a Year 12/Year 13 experience. On the other hand, we have had some real sixth form successes; such as the Millfield story of a boy going at 16 and becoming head boy. We have had numerous school leaders who joined their schools in the sixth form. They are by far the biggest social mobility impact children.**

JC: How much money do you need?

**ID: The merger brought with it a capital fund; the running cost of the charity equates to the income from that fund. Therefore, every pound we are given goes towards the pupils. The average Royal SpringBoard contribution per child is just under £5k; which I think is the reason we have a growing number of schools who fully fund SpringBoard children. I think we are seeing a cultural change in schools.**

JC: So, that's 500 pupils at an average of £5k equals £2.5m. So you need to raise substantial sums of money.

**ID: Correct. I spend a lot of time fundraising; we also have a director of fundraising. Where does the money come from? Repeat business from individual supporters. In my experience, individuals and organisations give money in the same way that they invest. They want to know the numbers, the metrics, the success rate and the key performance indicators. We can reference our children against free school meals, looked-after children, etc. The retention rate is critical – that is, the success rate of the pupil completing their intended course – as is the amount spent per child. We have just been through the next funding round. We have also grown corporate support in addition to individuals: Credit Suisse is now more involved and we have support from Wolfson and Garfield Weston. Through us, they are supporting our social mobility principle.**

**We need £15m to meet our aspirations of 1,000 children over the next five years. We've got about £5m committed, £4m warm. It is just like a start-up business. We had an idea and found some people. We have scaled it and continue to do so. As it gets larger, there is the higher level of governance. As you get bigger, you are eligible for bigger grant organisations and with that comes more accountability. But we don't want to become dependent on government funding which might get removed in the future.**

**What we have been able to do by aggregating 120 schools and 800 children is evaluate and analyse the outcomes. Our pitch is: "You are now supporting a social mobility charity – boarding schools are a means to a desirable end."**

JC: You have your eight staff and presumably a group of trustees. Are they donors, too?

**ID: I have 12 trustees, all of them are committed and enthusiastic.**

JC: Can this model be transposed into the day school market or are day schools best left to get on with what they are doing?

**ID: We have been asked in the past about how it might work. The area we are exploring at the moment is the DfE looked-after children agenda, which might include independent day schools. Nadhim Zahawi, the minister responsible for looked-after children, was aware that we already placed looked-after children in boarding schools. I had a meeting with him a year ago and wrote a paper about how we might develop this model. I felt that we could certainly place more looked-after children in boarding schools but probably not as many as some thought. After some research, I came to the conclusion that as a pilot scheme we could work with 75 children in day schools and 50 in boarding schools each year, which would equate to a thousand over seven years. And then let's look at their performance.**

**The DfE is now working on the idea of regional hubs. What they want is for a central organisation to run a regional hub to co-ordinate placements and outreach in day schools as well as boarding schools. The idea is that there would be between six and 10 regional hubs around the country. The hub system would have a central organisation co-ordinating the independent schools and those responsible in local authorities for looked-after children; this would involve placements in both day and boarding schools and an outreach programme, e.g. master classes, sharing sports facilities, etc.**

**The ISC has supported us as the organisation to do this. So, there is a possibility that we might move into doing this partnership scheme.**

**It would need very careful thought indeed and expectations need managing; we have had a lot of experience and success of working with looked-after children. It is essential for us to get it right because if pupils leave, that's the worst of all worlds. If you say you can and then you can't and the children have a miserable time, that's a disaster. Doing it badly is not a way for boarding schools to be more socially engaged.**

JC: So, you are trying to grow gradually, getting it right, making sure that schools know what it takes. There is nothing worse than for schools to enter into this and do it badly. That damages all the success.

**ID: That's why I like the aggregation. We are working on behalf of the sector as a whole.**

JC: Thank you. You are free to go.

## Chapter 11:

# Girls' Day School Trust (GDST)

*The Girls' Day School Trust (GDST) is a group of 25 schools: 23 of them independent schools and two of them state-funded academies. Of the 23 independent schools, 12 are in London and the other 11 are spread across England and Wales, from Newcastle High School for Girls in the north to Portsmouth High School in the south, from Norwich High School in the east to Howell's School, Llandaff, in the west. The two academies are The Belvedere Academy in Liverpool and Birkenhead High School Academy, converted into the state sector in 2007 and 2009, respectively. So, the GDST is one of the largest groups of independent schools in the UK, educating 19,000 girls from the age of three to 18 and employing 3,500 staff.*

*The purpose of the organisation, founded in 1872 and originally called the Girls' Public Day School Company, was to provide affordable day school education for girls, with an emphasis on a high standard of academic education, together with moral and religious education. Even at this early stage, accessibility was a priority and school fees were deliberately kept low. From 1905 until 1950 the schools operated under the name of the Girls' Public Day School Trust Limited and the most significant decision of this period was to join the Government's Direct Grant scheme. When this was abolished in 1976, the GPDST schools, like so many other schools in the scheme, converted to full independence to remain academically selective. In the same year, the Girls' Public Day School Trust began to actively fundraise to cater for the loss of government funding and provide bursaries for girls who otherwise could not afford to go to the schools. In 1980, the GPDST joined the Assisted Places scheme and remained part of the scheme until its closure in 1997.*

*In 1998 GPDST became GDST and, since then, it has continued to lead the way in girls' education and in the pursuit of greater social mobility. Currently, 1,100 pupils are on means-tested bursaries and, of those, 40% are on full bursaries. This means that one in eight GDST girls in senior school benefits from a bursary.*

**Sam Davies [SD], head of philanthropy**

JC: I know that you are relatively new to this role. Could we start with your own life as a GDST girl and your route to this job?

**SD: I was born and bred in Portsmouth and I am the oldest of four children brought up by a single mother, and I lived on a council estate. At about the age of eight or nine, my teacher said to my mum that I was a bright little girl and it was she who encouraged my mum to put me in for the exam at Portsmouth High School. The idea of putting her daughter forward for an exam for a private school was a completely alien concept for my mother, who had left school at 16. I still remember very vividly going along on a Saturday morning for the exam. My mother had got the money together to buy me a briefcase, pencil case and other bits and pieces. So, I did well enough to receive a full bursary. This was still in the era of the Government's Assisted Places.**

**I don't know the exact proportion of Assisted Places girls but it would have been a minority. Although I met other girls who had Assisted Places, I know that I was one of the few who had a full bursary that extended to uniform, music lessons and so on.**

**That completely changed my world, broadened my horizons, gave me confidence, ignited further my passion for learning, my passion for words, and my passion for friendships. Anything I consider myself today was brought alive by that period. I very quickly became friends with girls who were wealthy and that was a very interesting meeting of cultures. I learnt a lot in that period of time and I remember it as a very happy period.**

**It was because of my time at Portsmouth High that I was able to make a very positive transition to university. I studied history and politics at Warwick and, at the end of my time at Warwick, I became a student fundraiser as a final year student. Then I was picked up by the telephone fundraising company after graduation and I spent two years running phone campaigns. I supervised over 20 phone campaigns, including schools and Oxbridge colleges, old and new universities. Then Warwick recruited me back to work for them and I worked there for 10 years, starting with phone campaigns but, by the end, I was heading up a big part of the overall development operation there. Then I went to the University of Brighton to develop a development and alumni engagement arm from scratch, a very different kind of institution, a very different challenge. I have just left that to come here and the primary reason has been, as a GDST bursary girl, I am motivated by the clear statement that the priority is bursary fundraising.**

JC: Could you summarise the state of play with the GDST in bursary fundraising as you arrive?

**SD: Since 1997, when the Government's Assisted Places scheme finished, the GDST has provided bursary support to more than 5,700 pupils. The GDST took the viewpoint at that stage that it would aim to continue what the Government had provided. So, this has always been a very important part of the DNA of the GDST.**

JC: These bursary funds have been spent over 20 years and across 25 schools. Where was the money coming from?

**SD: At present, around 5% of total fee income is being distributed for bursary provision. There is an endowment which has been built since 1998 through fundraising. There are development operations at some of the 25 individual schools as well as centrally.**

**I have recently been brought in with the target of increasing the endowment to celebrate the GDST's 150<sup>th</sup> anniversary in 2022 and to grow the annual income for bursaries.**

JC: You are a family of schools and you work for the head office. How does the structure work in development between the centre and the schools themselves?

**SD: I am still finding that out. The closest analogy I can think of is Oxford and Cambridge, with the colleges and the university. Each school has the choice whether to invest in a fundraising and alumnae engagement function. What I am trying to work out is how my resource, myself and my small team, can be best used. At the moment I have five colleagues working with me here at the Trust office and I hope to recruit at least one more colleague to focus on fundraising with me. So, the question is how my team allocates our efforts, when the schools are in so many different situations. Out of 25 schools, there are a handful that aren't currently as far ahead in terms of fundraising and alumnae engagement. Then there are five or six schools who are very well-established in what they are doing. These would all have their own development teams: some of them might sit in marketing, some of them might be separate, some of them have one person, some have two and some have four. Then there is a middle chunk, a dozen or so, who are doing some work in the area. So, I have to try to assess how to support activities that are already in place and build them up at the same time. I have to identify where there is a chance to make a big impact in a short space of time.**

**For example, at some schools, a lot of donations come from parents, not from alumnae. In other parts of the country, that is inverted and alumnae are the majority of donors. So, for me that means that there could be groups of alumnae who are being overlooked.**

JC: And, as Direct Grant schools, these schools would have had able pupils there for free who have gone on to be successful.

**SD: Yes, but these people are perhaps not being engaged with in the same way. They are receiving communications, but in some cases, we aren't engaging them as effectively as we might. My background at university tells me that they are the critical people.**

JC: And how can schools find the bursary pupils who will really benefit from the opportunity?

**SD: My challenge is like this. I feel very strongly about equality, accessibility and inclusivity. And then there is the issue of regional disparity and how bursaries are going to be seen differently by different people in different parts of the country. It is very complex and, as yet, it doesn't seem very clear to me about how to push forward.**

JC: Because you have such different schools with such different contexts and capacities to raise funds, how does what you do fit in with what schools themselves might do? After all, they have their own clientele but you might be asking different people.

**SD: That's the big question, how to get this working to the best effect. It's inefficient for us to be duplicating effort and sending out messages that are the same but also different. So, I see there is scope for harmonisation, not standardisation – being more open about when things happen during the year and making sure that we are getting the most out of people and resource.**

**At the moment, I don't believe there is as much legacy fundraising going on as there could be – this type of fundraising should be a very productive area for girls' schools.**

**My perspective so far is that the schools that are doing well in fundraising are securing donations primarily from current parents and this has demonstrated what can be done.**

**However, at the moment, what we run the risk of doing is losing alumnae from the Direct Grant era who are getting older.**

**So, I am two weeks and two days in. I am thinking that there is a huge amount of potential with alumnae generally.**

JC: Here is a direct question. Has Portsmouth High School had dealings with you in fundraising terms?

**SD: Yes. When I left school in 1994, fundraising was something that wasn't on my radar. When I finished university and was in fundraising at Warwick, I thought: "The GDST must be doing this, or Portsmouth High." In fact, when I was at school, I only knew of Portsmouth High: I didn't have any notion of the GDST. In 2010, I made a donation to the school of £100 – we looked it up on the data base – and I was encouraged to see a record had been kept!**

JC: Hurray for the way we were.

**SD: The fact that I got an Assisted Place was not on the database because the only information available is 1998 onwards; however, we do have flags for GDST bursary holders from 1998 onwards which is very valuable and will help us be more sophisticated in tailoring approaches and using the data available to us.**

**GDST schools are modern, accessible and grounded – these aspects are very important for a campaign around bursaries. Our girls come from all walks of life – they are everyday people. It's about authenticity.**



JC: One of the big things in the world of fundraising is that it's all right for boys' schools but much harder for girls' schools. What is your answer?

**SD: I have two answers. There is a mood and a move in society about women and empowerment and the creation of wealth. There is much talk about women creating wealth in the next generation. There is a societal shift. And, secondly, it takes time. It takes consistency. There has been more attention on boys' schools and that's where the movement started, but other schools are coming through. And that's just like at the universities.**

JC: This is a time of change.

From your university experience, what do you think are the fundamental elements that make for successful fundraising?

**SD: It's relationships. If someone wants to give money for bursaries, I want them to be engaging with the pupils that might benefit. It's bringing everything to life. The one thing that I will hugely miss about university fundraising is raising money for research. Whether it be cancer research or water sanitation or whatever, you could bring it to life. Here, the primary thing we have are the pupils, the girls. So, we're creating the opportunity for the donors to see and hear exactly what the impact is. If we had a bursary student sitting here and asked her what she thought of her bursary, she would say: "It's amazing. Thank you very much." But she is living in it, in the moment. It is not until you leave it that you can reflect upon it. It was only when I left that I could see the impact. It's those stories about the distance travelled, to bring that to life for people who would not have any concept of it otherwise.**

**Successful fundraising generally is being very clear about the target and that target being strategic. This is not just a nice thing to have. It is fundamental to what we do.**

JC: Can I just go back to the particular situation of the GDST? The schools are in different contexts so the level of support, the sliding scales, could be different from school to school. How does that work? Separate schools make very different decisions already.

**SD: There is a central, financial assistance team here. They do the assessment. It is blind assessed. The school gets told which of their applications would be eligible for a bursary and they can then decide which ones they select, knowing that one girl might be a full bursary and another a part bursary. I think that is difficult because my temptation would always be to give to the girl who had the greater need. The schools can't decide who qualifies for a bursary but they decide who to give the place to.**

JC: And if you raise your money centrally as well as locally, how do you decide who gets what?

**SD: The endowment has been built up and continues to grow, but the return on the endowment is distributed amongst the majority of our 25 schools. Then there is the expendable bursaries pot. In that, each school has access to funds designated to their school for immediate spend.**

JC: There must also be a difference in demand at each school.

**SD: I don't know the details but some of our schools could fill many more places with bursaries than other schools. I imagine there is a focus on creating inclusive and diverse communities within each school.**

JC: You say you'll want to harmonise activity and share best practice, but you will also have your own central activities with trusts and corporates. Most of the big fundraising schools have worked with their alumni or parent body and thought that trusts were harder to get to. What will your strategy, your narrative be to get to these bigger organisations who are not closely linked to existing schools?

**SD: For a number of years, the GDST has had a relationship with a major corporate bursary sponsor, but this is now coming to an end as the organisation is shifting direction on corporate social responsibility. I don't think the climate today allows for such an amount of money from one donor. I think there is scope for a suite of corporate sponsors, particularly those who are looking to enhance their reputation with regard to the gender pay gap or women in STEM. There are opportunities there. We need to look again at the alumnae – for example, there is a lot of potential in legacy fundraising. I believe it will be very hard to get money for the endowment from other sources – private individuals will want to see the impact of their donations and corporates or trusts again are focussed on demonstrating impact. The trusts and foundations area is interesting. I know that there are a lot of these organisations that work with universities. As for the narrative, there is a lot of talk in the sector about how traditional fundraising campaigns are run. Let's stop trying to make the donors feel sorry for the beneficiaries and let's start recognising them as equals. I think about my own background. We may not have had a lot of money but my mum made sure we were kind, respectful, knew the difference between right and wrong. We had values and a lot of the girls today would not want someone to come along and patronise them. They want a chance to do their very best. So, this is a very different, more uplifting and exciting story rather than giving to people less fortunate than themselves. That's a very paternalistic model.**

JC: So, there may be organisations out there who might see you as a social mobility charity, like SpringBoard. However, most schools have thought it better to concentrate their efforts at people with a visceral connection with the institution, rather than to be trying to get people to give money to an independent school.

**SD: I think that is absolutely right and there is an opportunity. Last week we had a mentoring event, the first thing that I had been part of, organised by my team. There were 70 women here. It was GDST-organised and I had a woman next to me from Portsmouth and one from Norwich, and they said that whilst they were pupils, the only thing they thought about was their own school and not the GDST as a network. Now that they have left, they see how powerful the concept of the GDST is for them as alumnae. I don't know any other organisation that has that. They are part of an organisation that stretches across the world. There is real power in that messaging of the family beyond the school. Some of them perhaps didn't enjoy their time at school but they could still support what the GDST stands for. There are many different groups. It's complex. It's exciting. It's a challenge. And I like that.**

JC: You've got some big targets and you are very new to the role. This might apply to some readers of this book in the future. What do you think are the key steps, the next steps?

**SD: This is week three and I have been to two schools. By the end of the second month, I will have been to 10 of the schools. I am going to each of them because I need to know what they are doing, what they think. I want to understand the dynamic between the hub and the schools, what they see my role as being. There is a sense that we have a lot of strong advertising: a strong, simple brand, a national advertising campaign. That has a lot of mileage in it in terms of messaging, in terms of fundraising and engagement. It is bringing the GDST values to life: the fearlessness, the forward-thinking, the family. It's turning those into a fundraising narrative. How can you tell the story of the bursary in a more compelling way, in a way that it hasn't been told before? I want it to be a bit different. I want to get some major campaigns out there with the alumnae. If the schools aren't doing it, then we should be able to do it.**

**Educational fundraising can be very challenging, whether it be schools or universities, because there are a lot of worthy charities out there. To have your place in that line-up, you really need to be doing something that is quite remarkable. The movement in girls' education feels quite strong, tangible. We know more about girls' education than any other organisation. Since that's the case, what does it mean for bursaries? I want to take that forward.**

**It's still very early days and I am still trying to figure it out.**

JC: Each school has a different provision in terms of development: from teams of five to half a person, or a person doing a dual role. Do you think every school will need its own viable team in place?

**SD: Yes, there is going to have to be something, even if we create blueprints and each school follows the blueprint, as long as the bases are being covered. Otherwise, we are going to end up with skewed situations. To build on the family concept is important. We have some schools who are ahead of the game but we need everyone to be more in the same kind of area.**

JC: How is your central team structured?

**SD: I have got two alumnae team members who do the GDST magazine which goes to everyone and our GDST mentoring which is open to everyone. All the alumnae engagement goes through them and they are the key contact for those who do alumnae engagement in the schools. They do events for the whole network and the alumnae of the year awards. There are two database people and we hold all the data for all the schools. The schools have been trained on the database so they can update, but we are the cornerstone of the system. The reports about funding, income, pledges all have to come from us, and that's a good thing. There aren't lots of spreadsheets going around. As for fundraising, at the moment it's me and I have a fundraising assistant, but I have scope to have one more person with me. Then it's up to me to start showing some results before I start asking for more.**

JC: Do your development people all gather?

**SD: Our next meeting is in June and that's the first one I will have attended. I think it is vital that we encourage colleagues across the network to share their experiences so that everyone can benefit.**

**There is no doubt that schools gain strength from the GDST. When they do a capital project for example, that is underwritten by the GDST and that helps.**

**I am really enjoying it so far and it is a real challenge which I like. It is a great chance to do something really substantial. If we could get a second person in for fundraising, that person could concentrate on the schools that would benefit most from additional support. And that could bring the totals up significantly whilst we are trying to do things in the centre. There are different ways of approaching it.**

JC: This is fascinating because you have so many different situations and what you achieve will matter for all girls' schools. You will be the bellwether.

## Chapter 12:

# Colfe's School

### Introduction

*Colfe's is one of the oldest schools in London. Originally established by John Glyn in 1574, the school was re-founded in 1652 by the Reverend Abraham Colfe, Vicar of Lewisham.*

*When Colfe died in 1657, he took the enlightened step of entrusting the school to the Worshipful Company of Leathersellers in the City of London. Colfe's original vision was to educate the children of 'the hundred of Blackheath' and although today pupils travel to the school from all parts of south east London, a strong sense of local community remains, with most of the pupils coming from the boroughs of Lewisham, Bromley, Bexley and Greenwich.*

*The 'school on the hill', as it was known locally, stood on Lewisham Hill until 1944 when it was badly bombed. The pupils were evacuated to schools in Tunbridge Wells and Somerset and then spent many years in temporary accommodation before the school re-opened in 1964 on the site it occupies today. At that time, it was a grammar school for boys, but Colfe's became independent in 1977. Girls have been admitted to the sixth form for 40 years, and in 2019 the school is celebrating 20 years of being fully co-educational.*

*In the 1980s a junior school was also created which now educates 450 children from the ages of three to 11. One of the declared aims of the school is 'to maintain a balanced community of children from varied backgrounds within the context of an academically selective school. In recent years the school has developed an extensive bursary programme in the sixth form in partnership with the Worshipful Company of Leathersellers, whose engagement with the school goes back over 350 years. So, now over 10% of the sixth form receive 100% bursaries.*

**Richard Russell (RR), head**

JC: Richard, you are head of a school that has no track record of fundraising for bursaries, but accessibility is something that is close to your heart and to the heart of Colfe's. So, what's to be done?

**RR: The challenge of creating a tradition when there isn't an existing culture of giving is a very difficult one. There are other schools that are in a better position because they have an existing tradition of philanthropy on which they can build. Thanks to the generosity of the Leathersellers' city livery company, Colfe's has secured short-term funding for scholars from disadvantaged backgrounds so we can create a track record of success from a standing start.**

JC: You are taking students into Year 12 as your main mechanism. Can you just explain to me the design of the school between Years 11 and 12 – how many leave, how many come in?

**RR: We have some students who leave to go to the Kent grammar schools because they have another round of recruiting and fee fatigue sets in after five years. We also lose a small number who don't get the grades to return. But we get a big influx of kids, between 25 and 30, so that the numbers in Year 11 and Year 12 are very similar and this makes it easy for the scholars to feel at home quickly as part of a large new cohort.**

JC: Talk me through the Leathersellers' funding and scholarships.

**RR: It started with a relationship with one local comprehensive. Within a couple of years, we got a pupil into Cambridge to do classics and she did rather well. Then we started to get applications from other local schools. They started to come up to me at open evenings and said: "Why can't I apply for this?" We concluded that what we were doing was self-limiting if it was only one school. So we decided to expand it more widely and we now have a network of partner schools in Lewisham who are very positive about bursaries. We work collaboratively with the partner schools. Last week we took a coach up to Cambridge, full of Year 10 pupils from Colfe's but also from four partner schools. On the back of that, St Catherine's College in Oxford want us to be an outreach hub in South London.**

JC: You are clearly aiming at sixth form entry at the moment. Are you getting demand from able pupils to satisfy these places?

**RR: We have had more than 100 sitting our scholarship exam and I've got 12 scholarships available, so there is good demand. I know that there are other independent schools who have bursary schemes that are providing means-tested places for a much wider range of family incomes, but that's not where we are.**

JC: So, how do you allocate your bursaries with a finite pot and this number of applicants?

**RR: The Leathersellers have made it very simple. They have a very clear social agenda of their own and will only pay for pupils from disadvantaged backgrounds. In practice,**

that means that the household income of a Leathersellers' scholar has to be below £24,000. Sometimes you get someone whose income is £35k who could not possibly afford the fees or even a fraction of their fees, but because they are over the threshold for free school meals, they don't count as disadvantaged. That's tough but you have to draw the line somewhere.

We are looking for bright and resilient young people from disadvantaged backgrounds who have the potential to go the distance. We have had a couple of dropouts, as is inevitable, but none of them have dropped out because they have failed to integrate socially. I am just as proud of that as I am of any other side of what we are doing. The school is in a very normal, ordinary suburb of London and is full of normal kids. Pupils from a very wide social range can integrate. No one sticks out. It's also good for our existing pupils to find themselves alongside students who are so hungry for success and think nothing of staying after school to work in study rooms every afternoon until closing time.

JC: Of course, bursaries aren't the only way in which schools are at work in their communities.

RR: A relatively recent development has been the creation of the London Academy of Excellence and other similar schools in London. These are highly selective schools with very high levels of applications and high entry levels. Their exam results are better than some of the independent schools that are supporting them and, of course, that's a great achievement.

JC: And, what's next for Colfe's?

RR: So, now we are moving in the direction of a campaign and the Leathersellers' money has given us some time, and it is a luxury to have that time. It does mean that the narrative gets stronger and we will have a convincing case for support. But I don't think we will be able to do it without some really big hitters and we have to identify them.

**Russell Joyce (RJ), development and events officer, Colfe's, and Akin, a sixth form pupil**

JC: Please tell me about the history of Colfe's and how that relates to what you are doing in fundraising.

RJ: The school was founded in 1652 by the Vicar of Lewisham, the Rev. Abraham Colfe.

He founded the school for pupils of 'good wit and capacity' so that they be 'apt to learn'. The sum for teaching the sons of poor persons and yeomen was five shillings a year and for gentlemen, 10 shillings a year. Scholars were to be 30 in number and there is a very detailed will about all his provisions. It was set up for the 'hundred of Blackheath' and obviously this was all countryside then, hunting land and where the Leathersellers grazed their deer. Colfe married the widow of a tanner, Margaret Valentine, who was a physician and doctor. They were good friends of a man called William Manby, who was the clerk to the Worshipful Company of Leathersellers from 1626 – 1660 and therein lies the connection.

**However, Colfe left only a very small endowment and that got used up very quickly, within 20 years.**

JC: The school was a Direct Grant school and government Assisted Places would have petered out from 1997, so what bursary provision has the school had?

**RJ: The headmaster (when I was a boy here), Vivian Anthony, was tasked with taking Colfe's independent at the end of the Government Assisted Places scheme, when the grammar schools in London were being abolished. Here we are on the border of Lewisham and Royal Greenwich, two of London's poorest boroughs, and on the other side of Greenwich is Bexley in Kent, where grammar schools have survived. Those grammar schools are right on our doorstep, so we have a lot of competition. I know that the governors at the time were very worried about charging fees, about £3,000 a year back then. I know that Vivian did a lot of fundraising directly. I have seen lots of correspondence to charitable trusts, to foundations (the Rank Foundation, for example), so this fundraising was directed externally.**

In essence, the school has had very little bursary provision since then. No large endowment from our founder exists, but we do have a small charitable trust, which provides a very modest amount towards bursaries annually.

In terms of parents, our Parents and Friends Association, PAFA as we call it, was much more active in those days and raised lots of money. That organisation is not as active today as it has been however.

JC: But even the best PTAs are only providing thousands of pounds. They aren't producing hundreds of thousands of pounds. So, what was the next step?

**RJ: The development office at Colfe's was set up in 2000 by my predecessor, Andy Brooker, an Old Colfeian and former sports master, and he had a small amount of part-time support. However, these early efforts concentrated on fundraising and the office wasn't resourced to do the necessary stewardship or friend-raising particularly well. Unfortunately, the school developed a bit of a reputation for only getting in touch when it wanted money. People have long memories and that hasn't really been helpful. That has made it harder.**

So, I took over in an unusual way in 2011. I enquired about a change of career into teaching, which didn't work out and a couple of weeks later, Richard rang me up and asked whether I'd like to run the alumni relations function, so I bit his arm off. We have been doing alumni relations activity ever since. The Old Colfeian Association was going through some changes at the time too: its funding used to be collected within the school fees, but that had to stop and so the income dropped off a cliff and the association had to review its approach.

JC: Almost every school has its old boys' association stories. It's not always easy.

**RJ: One of the things I worked on was to establish a former pupils' society for which membership was free, automatic and for life. All of that has come in-house: the**



**database, everything. People were wary at first but I think they realised that the school was better placed to do the job than a few well-meaning volunteers, no matter how good their intentions.**

JC: So, you are creating that community over time. What are the key elements at a time when you are specifically not raising money?

**RJ: We use a very effective platform for our alumni relations. It sends out a newsletter each week. We can have photos on there. We can advertise events. There's a directory. It's designed as a networking tool so that Old Colfeians can contact each other. Once upon a time, the Old Colfeians would have been your social home. Everybody lived locally and that's where you started off on a Friday evening. But now, we have new communications technology; more disposable income and a wider choice of venues to visit. One no longer needed that physical hub and our networks just exploded through social media. In this new world, the one thing that development offices can offer is a reconnection with the school and pupils' former teachers.**

JC: What kind of events do you run?

**RJ: I'm a one-man band – or a 1.2 man/woman band as we are fortunate enough to have the support of a regular volunteer one day a week. And I also run the CCF here. I have huge aspirations to run more events regionally and by age group and try to engage the current staff more. That would be very valuable. We run a black-tie dinner in November each year and we run a reunion drinks open to all age groups twice a year in the City. And I run a luncheon in Poole, which attracts a small but loyal group.**

JC: What proportion of your alumni do you have on board?

**RJ: We're pretty good. If we work on an average of 100 pupils a year, there should be about 6,700 contactable former pupils. In reality, we have about 4,000 who are contactable, whether that's a postal address or phone number. We have got about 3,000 email addresses, which is the best mode of communication, but farming email and contact addresses is not easy to do.**

**So, our online platform has been really good at helping us re-connect with alumni. And when we get in touch with people they are generally very positive towards the school.**

JC: Russell, could you talk me through the role and the mechanism of the Leathersellers and then we can talk to Akin about his experience here.

**RJ: The Leathersellers agreed to govern the school when Colfe died and have done so now for nearly 370 years. The Company generates income from a few acres of prime real estate in London and essentially they give circa £3m to charity each year. The education committee gave the headmaster £1m to spend on full bursaries over five years and we are now funding 12 scholars in the upper sixth and 12 in the lower sixth - all of that money is from the Leathersellers. Since a year group is 80 or 90 at the moment, we can say with confidence that over 10% of our sixth form qualify for free school meals.**

**That initial grant was for the first five years and that money has been spent. The Company has generously pledged a further £750k for the second five years. That will gradually be spent and the idea is that school fundraising should fill the gap to sustain our current 10%-plus model. To fund this number of scholars, we would need an income of £800k a year and, to raise that at 5% return, we would need an endowment/capital fund of £16m.**

JC: Akin, could you talk me through your story coming here?

**Akin: In Year 10, I was brought into my headteacher's office out of the blue. This was Addey and Stanhope School in New Cross. I was told about this new opportunity for my school, which is now a partnership school with Colfe's. And I was invited to test myself for the Leathersellers' Scholars programme. I was told that all I had to do was take the entrance exam, do as well as I can and, from there, it would be a really big thing because I would be one of the first ever from my school to come to Colfe's.**

JC: Did other students from your school take the test at the same time?

**Akin: Yes, there were six who took the test with me, for different scholarships, music and art. There were two people who got in but the other one went to St Olave's, a local grammar school.**

JC: I assume that there are other schools in this partnership which would support this Leathersellers' Scholarship.

**RJ: The Leathersellers Company has a federation of schools so we have close links with them. We have a teacher here who does outreach work with other local schools to get the message out to the heads and the pupils that, if you are bright, if you get five or more A\*s, then this is a chance for you.**

JC: How about you, Akin?

**Akin: I got 7 A\*s and 2 As and a B.**

**RJ: So, if they have the ability and the work ethic to do that, we hope this setting will be a place where they can flourish, going off to the best universities.**

JC: So, Akin, what's your UCAS situation?

**Akin: I have confirmed Warwick as my first choice to read maths.**

JC: What did the test consist of? Was it tough?

**Akin: I did find it quite difficult. Coming out of it, I did feel quite scared. There was an English paper where I had to read a passage and write an essay on the basis of that. A maths paper which was 40 minutes long, based on GCSE.**

JC: Which you presumably did very well in.

**Akin: I was told by Mr Russell that I was one of the top-scoring students. So, I was really pleased.**

JC: This is a big step for you. Talk me through making that step and settling in. And how has it been in terms of academic challenge?

**Akin: It was relatively easy settling in. I didn't think when I came that it was going to be a posh school because I really didn't know much about it. I get more grief now from my friends who are at a nearby sixth form who think it's a bit posh. I always have to tell them that it isn't.**

**There were 12 Leathersellers' Scholars and a similar number of other kids joining the sixth form for the first time, so that helped as well.**

**Of course, because people are all different, there must have been different levels of anxiety, but all I can say now is that all the scholars are fully integrated in friendship groups and social circles. There is a real mix of those who came in new as scholars and the existing students, so the school can pride itself on welcoming people.**

JC: Obviously Warwick is one of the very top universities for maths. Do you feel coming here has helped you?

**Akin: It has definitely been more rigorous than anything I was used to. The step up to A-level is big anyway, in terms of the workload. It was good for me because it gave me a shove; it made me realise that I couldn't rest on my laurels. It is rigorous, but it also works because the teachers know what they are doing in terms of setting work, but, if you are able to cope with the workload, anything is possible, to get the best grades you can.**

JC: What about the other things that a school like this can offer?

**Akin: I've played in the football team, the basketball team and I have taken up cricket, hopefully to play in a team. There's a lot of drama and other activities and one of the big things here is the house competitions, all the way from psychology to rugby sevens.**

JC: This is quite a delicate issue at some schools but do the other pupils or the teachers know who is here on a bursary?

**RJ: It's not a secret but we don't line them up and say: "These are the Leathersellers' Scholars." It is not something anyone is ashamed of and there is a sense that it's the reverse. Being clever becomes cool again and our head of sixth form says they make it a better school. Their work ethic is strong and the students here who might be coasting see new pupils getting better grades and working harder, so it motivates existing pupils. It's infectious.**

**As for the terminology we use, Akin has won a 'means-tested scholarship'. There are other scholarships for different subjects upon entry into the sixth form – music, art, sport etc – but the majority are very small, typically ranging from 5 – 20%.**

JC: I'd argue that such arrivals make the school a better place. And how much demand is there for your sixth form Leathersellers' Scholarships?

**RJ: I haven't the exact figures but it is growing in popularity and it is oversubscribed. The word is getting out there and there is an understanding that a Leathersellers' Scholarship at Colfe's is valuable and to be cherished.**

JC: Akin, do you have contact with your old school or other students who might be thinking of applying?

**Akin: I have been back twice and actually delivered an assembly to Years 10 and 11 about the scholarship, what it entailed for me and why it could be beneficial for anyone else. As a result of this, whilst there were only six applicants from my school in my year, there were 15 this year.**

JC: So, now you have to use your years of work with the community and the experience of fine young men like Akin to make progress in fundraising.

**RJ: We are working with a fundraising consultant. We have a campaign management board and a case for support, which is being reviewed. The idea is that we go out to present the case for support to potential major donors to see what they think. There is no ask at that stage. We are saying: "These are our aspirations. Is this something that you think you will be able to support? This is our target." I think the methodology is sound. I am not going as fast as I would like but those are the constraints of the other things I do. We also need those at the very top of the organisation – governors, head, SLT – to agree that this is a key priority.**

JC: Akin, what about the university outcomes for your Leathersellers' Scholar contemporaries?

**Akin: They've got really good offers at Warwick, Birmingham and Cardiff. There is a lot of ambition to get to the best universities.**

**RJ: These students arrive with very strong academic performance so that, by their very presence, they are raising standards and aspirations. Lots of them are applying to Oxbridge and to study medicine as well. So, the head has a very strong case to go back to the Leathersellers and say: "Look, your money is having this effect, really transforming young people's lives."**

**I have heard the head say: 'I want everyone to be able to be a candidate for this school because there are lots and lots of bright children out there who can't afford it.'**

JC: Wise words and a good place to end. It's been a pleasure to talk to you, Akin, and I am sure you'll do yourself, the school and the Leathersellers' Scholarship proud.

## Chapter 13:

# City of London Freeman's School

### Introduction

*City of London School (1834), City of London Freeman's School (1854) and City of London School for Girls (1881) are three schools founded in the 19th century for the provision of education in the City and they continue to be owned and governed by the City of London Corporation.*

*The original name of the school was City of London Freeman's Orphan School and it was specifically set up for 'the maintenance and religious and virtuous education of orphans of Freeman of the City of London'; in this case, orphans being children who had lost their father. In the beginning, the children were aged between nine and 15. Of course, orphans needed accommodation and could be female as well as male, so the school was one of the very first co-educational independent boarding schools. The school was originally sited in Ferndale, Brixton, and had a capacity of 100 boys and girls. However, unlike the other two schools which have stayed within the City, City of London Freeman's School moved out to Ashted Park in 1926, a great house with 57 acres of land.*

*In recent times, the school has grown and developed its facilities: recent developments include a new boarding house, music block and swimming pool and the main house is about to be fully renovated to provide 21st century sixth form facilities.*

*There are over 500 pupils in the senior school (Years 9 to 13) of whom 225 are in the sixth form; the junior school has 400 pupils aged from seven to 13. Boarding continues with 60 students, of whom the majority are from overseas.*

**Roland Martin (RM), headmaster**

JC: You are now head of City of London Freeman's School, having been head of Rendcomb. For that reason, you claim a rare achievement, I gather.

**RM: Yes. I was told that there are only about a dozen HMC schools that don't have a development function and I have managed to be head of two of them. So, we are very much at the start of trying to get some serious fundraising going.**

JC: Could you place your school in its historic context and what you did inherit?

**RM: We were founded in 1854 as a school to give orphaned children of Freemen of the City of London a 'religious and virtuous education'. The original purpose was possibly misleading because by 'orphaned child' they meant they had lost their father. The City of London Corporation has City of London School for Boys, City of London School for Girls and us. So, we're not ancient. We moved out here to Ashted in 1926. We still have a sum of money that we can give to support foundation scholars. As you might imagine, we don't have many orphaned children of Freemen of the City of London anymore who haven't got means, and we want to move funds into other means-tested bursaries.**

**I am able to draw on funds from it from time to time and will be asking to do so this year to help to support the work that we do to support disadvantaged children. If you become a Freeman of the City of London, you have to pay a £100 fee and £30 of that goes towards this foundation. There are quite a few people getting their freedom every year, so it is an ever-growing fund. We have to make that relevant.**

**When I got to the school, the number of pupils receiving 80%-plus awards was small and I wanted to change that; this year we have 28 pupils on 80%-plus awards.**

JC: Where have those funds come from?

**RM: The main thing I have done is to move away from scholarships. I managed to get a really interesting bequest that had come from a local solicitor. The solicitor wrote to a number of independent schools – and there are plenty of them – saying that they had a bequest of £200k and asked what we would do with it. At the moment, the City of London gives us some money for bursary provision and they will match every pound I raise through donations. So, I wrote back and said that the first thing that I could do was double the money. That suddenly became attractive and they gave it to us.**

**That matched funding is a real opportunity for us but we are only starting to use it now, really. Last year, we managed to raise £86k from a regular giving campaign. I know that's not big by some standards but it is a start.**

JC: Do you now have a development function?

**RM: I appointed a development officer who started things going. She left back in November 2018 and I recruited a new person who has started very well. I also have a consultant whom I am using to steer us through at a higher level. In both my old school and Freeman's, we didn't have a database but now we have one and have cleaned it up; we held our first big 'Forever Freeman's' function in the Guildhall last year. We've started to engage with parents and had a couple of good wins with them. One has generously agreed that they will fund a child in the school whilst their own child is going through, which is lovely. We are starting to have those conversations more widely before we go out to the alumni.**

JC: So what is the plan from here?

**RM: We've got to work hard on three fronts. We've got to keep on trying to raise money from current parents. We want to start engaging more with our alumni and that is why the relationship with them has to be handled carefully. The third aspect is to dramatically improve the facilities in the school, including extending boarding. We are a school of 910 with 60 boarders. We want to get to 100 boarders so that we would then also have a substantial basis of accommodation. We can use the asset during Easter and summer partly to support the family of schools but also to raise some money from overseas which we can plough back into bursaries and community and partnerships work.**

JC: Do your bursary students come at 11 or 16?

**RM: It's a bit of both. We are trying to fund the expensive ones in the sixth form, so we have four Royal National Children's SpringBoard Foundation places in the sixth form and we are taking another three next year; we have another SpringBoard pupil in Year 9. We work with partners we know well, for example Ray Lewis at Eastside Young Leaders' Academy who now support girls as well as boys and Gladesmore School, which has extremely supportive staff and sends pupils who are hungry to take the opportunity. We have a community and partnerships officer, and she is helping us to identify the bursary candidates who could benefit most from the opportunity as well as doing important liaison work with state schools.**

**We are fortunate in having a boarding element in the school because it is there that you can have a serious conversation about kids who need looking after. That is certainly what we did at Rendcomb and we had wonderful success stories. For example, a fostered girl from a previously very disadvantaged background who ended up playing lacrosse for the west of England.**

**We have a target at Freeman's: we want 5% of the children in the school to be on 80%-plus bursaries by 2022 and that will cost just over £1m per year. I know this is modest by the ambitions of some schools but we have started from zero. We want the 5% to be 10% very quickly. We came up with the 5% figure in 2015 so that gave us seven years to get there. We are also trying to expand the school so that we have a little more financial flexibility. But obviously the political picture and pressures on independent schools is ever-changing.**

JC: How do you plan to increase the number of bursary candidates you have?

**RM: We have formed good relationships with a couple of local state schools and community organisations. One of the links that has been made was with the Leatherhead Youth Project. North Leatherhead is a really deprived area locally. The 'project' is a youth club that has taken over and converted a church. They are open six days a week. They have their own coffee shop with home-trained baristas. In the evening, it's a youth club. There is a counselling service there, too, which is quite remarkable. We've got our first pupil from there in the sixth form.**

JC: Do you feel that your geographical situation will make it harder over time to get a substantial number of kids who are going to benefit?

**RM: We are going to have to work hard at it because the average house price in Ashted is £600k. So, our immediate locality is pretty affluent. We have a member of staff responsible for going out and finding people to fill the spaces. That is a part of our community function. Some of this work is with schools who have pupils who will naturally be moving on at 11 and 16.**

JC: How does offering bursaries fit in with the shape of your recruitment into the school?

**RM: We have a junior school and the majority of our pupils start when they are seven. We are heavily oversubscribed at seven because parents are keen to get their children into the school for the next 11 years. We have another form intake at 11 and another form at 13. For Year 7 we get about 110 applicants. We are heavily oversubscribed at every level except Year 9 and that's because the prep school market is changing locally. One of our local prep schools is going up to 16, which is the latest in a pattern of change in this area.**

JC: Will that relatively narrow gate of entry at 11 enable you to engage in accessibility through bursaries to the extent that you would like?

**RM: We have been focussing on sixth form support but, yes. It would have to be a child who would stand to really thrive, but we are not averse to offering a free place at this entry level or any other.**

JC: You have also talked about capital projects. Is that all part of the plan?

**RM: We certainly need to develop the buildings to generate the revenue – not least through lettings – to support the partnerships function. It is an unusual landscape. So, at the moment, I am asking the Corporation for a substantial sum of money to borrow to fund our building project.**

**If people wanted to give us money to use for buildings and development, we'd use it for that, but I haven't been pushing for this. I've been pushing for money for bursaries.**

**So many people have preconceptions about us as a school. They think that because we are a 'City of London school', we must have lots of money. We haven't and we haven't got an endowment. The City is very generous with matched funding and we**



**don't have to pay for the lease of the buildings – they are all owned by the City of London. That's good but if we build, we borrow – like everyone else.**

JC: How aware of the issues of development are your governors?

**RM: The structure of the governing body has been reviewed recently. The chairman does three years and then stands down and does a year before and a year afterwards in a vice-chairman role because of the City of London structures. This does mean that I have two former chairmen on my board. My current and previous chairman are supportive; the City has a genuine desire to improve social mobility and its members seem to be very behind that, which is good. We do have regular meetings about partnership work, community work and bursary provision and the three schools have to submit a report to The Education Board each year for wider scrutiny. We do some strategic thinking outside the formal meetings but that will need to develop as we progress what we are doing.**

JC: Do you have, as yet, people amongst the alumni or the parental body whom you know to be big donors in the future?

**RM: I think there are but it depends what you mean by 'big'. We are going to have a few people who are going to give us £100k or £200k but I cannot see that we'll find lots of people who want to write us a cheque for £1m. Hope I am wrong though!**

JC: How are you getting your message out?

**RM: There are two things that I have been really pedalling in my speeches, in public and to the common room. They are probably sick of it! It's about bursaries and it's about partnership work. So, I am also engaged in a project with professor Sonia Blandford which is called Counterpoint. We are one of the few hub schools that are looking at measuring the impact of partnership work between state and independent schools on Year 9 students.**

**As for the wider world beyond school, messaging is very important. If people don't know what you have on offer, then it clearly won't work. We are certainly getting far more bursary applications than we ever had in the past.**

JC: You clearly feel passionate about giving opportunities through bursaries?

**RM: Well, I have a similar story to colleagues such as Patrick Derham, Martin Boulton and David Goodhew. My mum still lives in a council house. My dad died when I was four and a half. I was brought up on a widow's pension and then went to Rendcomb, an independent school, for free. That totally transformed my life, taking me via Eton and Rendcomb to this job. That has informed how I feel about giving people in similar situations opportunities. Also, there is an additional factor at City of London Freemen's School. We are not a charity. We are a Corporation school. So, one of the most powerful stories I can tell about raising money or partnership is that we don't have to do this for our charitable status. We are doing it because we want to do it, because it's what we should be doing. So, in some ways, it's even more of a convincing message.**



## Chapter 14:

# King Edward's School, Birmingham Impact, support, outreach and some pupil voices

### Introduction

*King Edward's School, Birmingham, was founded in 1552, one of 30 schools founded by the boy king in his brief reign from 1547 to 1553. Of those schools, one, Christ's Hospital, didn't take his name in the beginning; many have kept it for over 450 years; and some, like Norwich School, Bromsgrove and Shrewsbury, lost it along the way.*

*The school occupied its original site on New Street, the main street of the city, from 1552 to 1937. For the last 100 of those 380 years, it lived in a building designed by Sir Charles Barry and Augustus Pugin, the prototype for the Houses of Parliament and the beginning of the Gothic revival in English architecture. In 1937, this great building was demolished and the school moved out to its current 50-acre site in Edgbaston.*

*The school grew in significance and success in the second half of the 19th century and in the early years of the 20th century, reflecting the explosive growth in prosperity of Birmingham itself, the city of a thousand trades. It was these years that produced Edward Burne-Jones, Edward White Benson (who was the first headmaster of Wellington College and an Archbishop of Canterbury) and JRR Tolkien. However, the school also expanded its contribution to education in the city, creating five grammar schools as well as King Edward's High School for Girls in 1883. It might even be argued that this was the first multi-academy trust. Today, the schools of King Edward VI in Birmingham comprise two independent schools, six selective grammar schools and two non-selective state schools and has been at the forefront of the moves towards making grammar schools more accessible to pupils from low-income families.*

*In the 20th century, King Edward's School was one of the biggest beneficiaries of the Direct Grant scheme: throughout the years from 1944 to its abolition in 1976, over 90% of the boys attended the school for free and this made it one of the most successful academic schools in the country. There were years when more than two-thirds of each cohort of 100 boys applied to Oxbridge and years when more than 40 boys were accepted. Even in 1991, when the Government's Assisted Places scheme was still in operation, the Financial Times league tables placed King Edward's number one in the country.*

*However, in the years that followed, there was a steep reduction in the number of boys with means-tested support and a decline in the school's performance and reputation. So, in the last decade, the school has engaged in a major drive to improve accessibility. This culminated in the AP100 Campaign, which raised £10m in seven years to fund 100 boys from nearly 2,000 donors. These funds came almost entirely from alumni giving.*

*During the same period, the school created an outreach programme through which it collaborates with over 230 junior schools in Birmingham. This means there are now 600 applicants for assisted places each year from 300 different junior schools and the increase in the provision of assisted places has merely hastened the ethnic diversity of the school.*

*The chapter on King Edward's is not about fundraising. It has three different elements. The first is a conversation with a member of staff at King Edward's who has recently completed a doctorate on the impact of assisted places on the boys to whom they are awarded. The second dialogue is with two members of staff who, as heads of Year 7, have been responsible for the pastoral support of boys new to King Edward's. The third might be the most important: it is a collection of testimonials of Assisted Place boys who have chosen to support the summer school for junior school pupils, which takes place in the early days of July.*

**j) Dr Peter Ollis, teacher of mathematics**

JC: Peter, could you please just give me an account of your journey to the research you have done?

**PO: I came from a working-class background and went to Bishop Vesey's Grammar School in Sutton Coldfield. From there I went to study mathematics at the University of Birmingham before joining the Royal Air Force. I spent 30 years in that career; when I retired at the age of 50, I decided that there was more to be done. I went into local government for four years and I didn't enjoy it at all. So, I decided to become a teacher and completed a PGCE. My first teaching job was at Giggleswick, a Yorkshire boarding school; my second was at a state University Technical College in Derbyshire. Then I came to King Edward's, where I have been for six years. For four of those years, I undertook a part-time doctorate at Birmingham University on the topic of the progression of boys who were on free places at King Edward's.**

JC: Why did you do such a thing at such a late stage in your career?

**PO: Since I had come from different sectors, I thought that I needed to establish my credentials in education. I had three possible avenues of research and this was most fruitful.**

JC: Could you, very simply, give an account of what you think the boys at King Edward's are like?

**PO: This may seem a strange thing to say, but the boys are just extremely pleasant and very nice. As an example, when I first started, I was a tutor of some lower sixth boys and they were always willing to help me in my ignorance as I settled in, rather than leave me to learn about the school myself. The boys are competitive because they are teenage boys and because they are very capable. However, they are competitive in a non-confrontational way. They wish to succeed but not at the expense of other people. They will try to help others along as well.**

JC: Although lots of us are deeply committed to the provision of means-tested places, there is very little impact research. Could you explain your methodology?

**PO: My research adopted mixed methods, both quantitative and qualitative. I looked at a recent period of 10 years and at all the free-place boys, 100% Assisted Place boys, in that time. During that decade, we had around 10 in each year, out of an average cohort of 120. I tracked them every step of the way: their performance in the school's entrance exam at age 10, their average score in internal exams from Years 7 to 10, their GCSE results, their end of lower sixth results, their A-level results and, from 2012, their International Baccalaureate diploma results. I put them in an order of merit, from one to 120, and tracked how they did over the eight data points. Simplistically, I suppose you'd expect a boy who arrived at 20th to stay 20th as he moved through the school. Since I was comparing the free-place boys with the fee-payers inside the system, I decided that this intra-school analysis would give the best indication of how the free-place boys fared.**

JC: That's the way in which we track them through the school – how they do in comparison with their peers.

**PO: That was the quantitative part. As for the qualitative element, I interviewed eight old boys who had left in the 1980s, trying to find a broad cross-section – those who had done really well and those who had been less successful. It was easier to find the strong performers but locating those towards the other end proved a little tricky. The eight I interviewed represented a fairly good mix but I am conscious that it was largely a self-selecting group. I carried out semi-structured interviews, asking them about their time at school and how their school days had affected them in their later lives.**

JC: So, what did the quantitative analysis deliver?

**PO: Having obtained a large corpus of data, when I analysed it my initial thoughts were: "That's dull," because, on average, the free place lads performed pretty much on a par with the fee-payers. In fact, it's not that dull because the underpinning theory is that the one thing they shouldn't do is "about the same". Many educationalists' instincts lead them to presume certain outcomes. Let's imagine a boy who has gone to a local state primary school, where the teaching may not have been that comprehensive and the preparation for the rigours of the King Edward's entrance examination was minimal. If he does well in the entrance exam despite these limitations, this could indicate a high level of 'raw ability' and so we would expect him to flourish at King Edward's. After all, there are smaller classes, greater individual attention – which King Edward's does so well – and all the extra-curricular activities that should carry him along. So, this boy should rocket to the top. And the top few places should always be populated by these free-place pupils. That's one theory.**

**Many sociologists take a completely different view. They say that education is not about teaching children but is more an exercise in social reproduction. If you take someone from a very working-class background and put him into a middle-class environment, sociological theory predicts that he may do badly. The situation can create a tension between home life and school life. He could end up conflicted and he may well feel that he does not fully belong in either situation. He may retreat to his different home circle, a place which may not be conducive to his success at school – friendship groups who don't share his education or aspirations, a home environment which doesn't help, parents who don't understand his work. Two or three of the interviewees from the 1980s said that, by the time they got to Year 9, they were doing schoolwork that their parents had never encountered. Parents might help in general terms but perhaps they couldn't help, for example, with learning French.**

JC: So what are some of the key takeaways from your research?

**PO: There is a need for a high level of intervention. When I was doing the interviews with the old boys from the 1980s, all of the participants said that it was a good thing that no one knew that they were on free places. But then it only took one or two questions for them to say: "If only the teachers had known that this was my background, they could have done so much more to help me." They then realised the contradiction in their position. I think in theory no one should know. In practice, we've**

**got to know. If we are taking these lads in, which is precisely what we should be doing, I would advocate that we then have an additional obligation to look after them in the best possible way when they are here. We can't just say: "You're with the rest of them." One of the interviewees said that he felt the school's policy was: 'We've done our bit; we've helped you out and got you here - now it's up to you.'**

JC: I wonder whether the free-place boys of the 21st century would feel the same. After all, pastoral care has moved on in many ways – as has the number of boys on Assisted Places.

**PO: The Year 7 tutors (shell form tutors) have plenty on as it is and it isn't fair to expect them to do this as well. I would be advocating that there should be a dedicated teacher, or number of teachers, who are responsible for looking after the assisted place boys. They should mentor these boys throughout at least their early years and should form a relationship with their parents – because it is as much a matter of informing the parents as educating the boys. It is a culture shock for the boys but they tend to adapt.**

JC: In my conversation with Debbie McMillan and Martin Monks (see below), who have been in charge of the shells, they talk about the efforts that are made. Even so, there is an argument that those parents need their own special shell parents' event. And at Rugby, for example, they have a lot in place to support their Arnold Foundation kids.

**PO: Boarding must be really tricky for the pupils and their parents in the separation. The advantage is that you don't have that stop-start-stop-start model of building the cultural capital at school and then going home and then starting again the next day.**

**As educationalists, we can be driven just by output and, in that case, we don't want them to be going home. This is one of the findings that I had great difficulty with. If you take a lad from a solid working-class background and look at him through the King Edward's lens, our measures of success are middle-class measures: a good university, a good job, earn a good salary, live in a nice house. When he achieves that, we all say: "Hasn't he done well?" But we need to be alert to his family roots and so to be cautious in steering him down a path which could take him too far from his cultural background.**

**I'd be interested to interview those parents subsequently: it would be interesting to find out how they judge the balance between the individual's success against the measures we have just discussed and any possible change in cultural and familial ties.**

JC: That can also vary from culture to culture, as well. So, increased awareness and specific pastoral support are part of the answer. But you also write about activities that contribute to social capital.

**PO: There are two aspects: social capital and cultural capital. Social capital is the friendship circles, the network of connections that builds up over time. The boys on assisted places will improve their social capital as long as they create a new bunch of friends at school, and then at university they will create an additional circle. The new circles they build will increase this valuable social capital but this will not happen if**

they retreat after school each day to their family group and their previous friendship groups; this could be very insular. Cultural capital is more interesting. It has three parts: embodied cultural capital is the individual's instinctive appreciation of how to behave and conduct oneself in any given context; objectified is in the form of cultural goods reflecting that appreciation; and the institutionalised is the formal recognition of cultural capital, generally in the form of tangible entities such as educational qualifications. Those who become 'successful' by the measures we have discussed are those who possess high levels of social and cultural capital. Some acquire them because of their backgrounds and others will amass them during their time in education. Boys who move into what might be classed as 'elite' professions will find themselves in new social circles where they are expected to know how to dress, what to say, how to behave. I strongly believe that our job as teachers is twofold – to teach our students the academic content which is the obvious output of schools, but then also to equip them to succeed in the social aspects of university and beyond, to facilitate their navigation of an increasingly complex world outside.

JC: How could we go about building this cultural capital?

PO: Our extra-curricular provision is brilliant but it has grown organically. We do lots of interesting things but we need to look more closely at the output, as the International Baccalaureate organisation is doing at the moment, asking: 'What do we want this young man to look like at the age of 18; what skills should he have?' I have just said how important it is that he should have these specific points of cultural capital. Everything we do in our Friday afternoon activities [where the boys are taken off academic timetable to undertake broader extra-curricular activities] should be working towards that. To that end, we need to identify what those skills need to be. When we have identified the skills, we can work towards building them. The benefits that they accrue from the bird-watching sessions or visits to local landmarks are interesting and valuable but there may be a greater benefit from a more targeted approach towards the acquisition of cultural capital.

JC: Let's go back to your 1980s interviewees. According to your graph about the scale of bursary provision, the 1980s were a low point. Now, there are 30% of boys on assisted places, which shows progress.

PO: There are now more boys receiving fee assistance – the 30% you mention – and of these there are around 10 each year on fully free places. I picked the 1980s group deliberately because that was the time when we had a small number of boys on assisted places. The cultural discrepancy, if there was one, would have been more obvious then than at any other time. Although all of the interviewees succeeded in their time at King Edward's and beyond, their comments highlighted some difficulties that these cultural differences had created. All were grateful for their schooling but their praise was sometimes guarded, suggesting that more targeted interventions might have proved beneficial. Perhaps there are some who feel they didn't quite realise their full potential because of this difference. I feel a great obligation to the boys on assisted places so that we do not allow any home/school discrepancy to create difficulties for them. The boys who experience the home/school cultural dissonance may struggle at university, too. The conflicted students who drop out of university,



**according to research, then find it difficult to go back to their old life, because they feel their failure.**

JC: SpringBoard is absolutely insistent in this area about getting it right. I'd be interested to know how your research would look with the KES boys from the *AP100 Campaign*, who are the current beneficiaries. If you were going to do more research, what would be your next steps? What might other schools do?

**PO: When I spoke to the governors a few months ago, they asked that question. What we do at present is gauge our success by university entry. Beyond that, we can fall into the trap of citing a particular assisted place boy who has done really well and extrapolate from that, assuming that all have done equally well. It would be better if we took a broader view. If we measure our success just by IB points gained and university entrance achieved, we will continue to focus too much on the academic aspects of schooling while ignoring those other important facets of capital acquisition. It was clear from the interviews I conducted that it was the development of the soft skills and similar aspects of broader education that really made the difference. And this is not confined to just the assisted place boys: social and cultural capital are valuable to all. It is much more difficult to teach these elements of education and so we can often be guilty of concentrating too much on the subject-specific aspects.**

JC: So, after this research and these conversations and the call for longer-term tracking, what should the school be doing? You are going to have a greater chance of success the greater the proportion of free-place boys.

**PO: I have covered at length the importance of the expressive elements of education. King Edward's already has a wide extra-curricular offer; I would like to see this more tightly related to the output characteristics that we see as important. And there is one other area that is crucial. Although we have generous assisted place provision, I would like to see many more such places made available. In terms of educational policy history, the period of the 1950s to the 1970s has been hailed as the golden age of social mobility with the Direct Grant schools, such as the King Edward's of the time, providing marvellous opportunities for so many children from a variety of backgrounds. In those early post-war decades, the Direct Grant scheme saw some 85% of King Edward's pupils on free places. We should not expect the return to such a government-based scheme but I believe that greater diversity of background would benefit all the pupils at the school. The recent *AP100 Campaign* was very successful in increasing the funding available. Combining such initiatives with a focus within the school of generating financial headroom to be channelled into fee assistance could pay real dividends. We may even be able to approach needs-blind entry and that would really be an achievement. It's not impossible and would be a fantastic goal.**

JC: I am sure our successors will sort it out.

ii) **Debbie McMillan (DM), former head of shells (Year 7), Martin Monks (MM), head of shells**

JC: Debbie, talk me through your time at King Edward's.

**DM: I started at King Edward's in 2002 as an unqualified chemistry teacher. I spent two years trying to teach and then I did the graduate teacher programme through the King Edward's teacher training consortium. In my fourth year I was appointed as head of removes, Year 8: I had been a form tutor for that year group for three years and I really loved doing that. I was head of removes for three years and then I became the head of shells, Year 7, and I did that for seven years.**

JC: Martin, your tale?

**MM: I came to King Edward's in 1995 as a music teacher and then within three or four years I became director of music. In 2013 I stepped down as director of music, had a year as a removes form tutor and then became head of removes, following Debbie. And then, after one year, I became head of shells and I have done that for two years.**

JC: Could we have some basic numbers about year groups and assisted places?

**MM: There are 124 boys in five forms in the shells this year. The number of pupils on assisted places is 13 this year, and nine are paying nothing.**

**DM: Across the whole school of 875 boys, there are 168 boys on assisted places in the school, of whom 66 are on 100% bursaries.**

JC: Before we go on to how this all happens, could you give me an estimate of ethnic mix?

**MM: That also has changed materially in recent times, and the growth in the number of assisted places has contributed to that. I'd say that now the school is close to two thirds Asian. The majority of that figure is from families that migrated from India, but the percentage of Muslims, mainly from Pakistan and Bangladesh, has increased, as has the number of Chinese boys.**

**DM: There is also an increase in Muslim boys from an African background, from Sudan and Somalia. The diversity is remarkable: there are boys applying from over 300 different junior schools each year and your cohort of 125 will come from 60 different junior schools. Some of those junior schools are very white, some of them are 100% Muslim from inner city areas.**

**MM: So, the school is hugely diverse...**

**DM: ...and massively tolerant. I'd like to think that this place could be, in its own way, a flagship of how a multi-racial, integrated community can work.**

**MM: I do think that the school does have an impact on the boys to contribute to that tolerance.**

JC: How?

**MM: Personal and social education lessons in the shells make a big difference, working on the fact that people are different, have different beliefs. We do assemblies on the issues of difference, even to the point of having an assembly on autism and how people's brains may work differently. Older boys do talks in junior assemblies about issues and their own experiences.**

**DM: A boy did a great assembly, for older boys and younger boys, recently on the Pashtuns and that talk had come out of something he had done in Agora, the school philosophy society. This was a very articulate older boy talking about and celebrating a group of people who are rarely talked about. As a staff, we do try to model that ourselves as best we can. I've got a Ramadan Mubarak sign on my door, just as I have a Christmas tree on my desk.**

**MM: Of course, it's not perfect. There are issues every now and again but it's isolated. I use the older boys to counsel the younger boys with issues, for example those who struggle with fasting. The older boys are really good role models.**

**DM: I sent an email to all parents in the school about Ramadan, so that the parents could tell us if their sons were fasting and how. I sent it to all parents and a couple of parents, who were not Muslim, wrote to say thank you that they were included. It's good for the parents to see what kind of a school their son attends and what we are trying to do.**

JC: How do your form tutors contribute to this?

**MM: We have a new logging system through which form tutors can flag up any issue. They log it and alert me and at that point I will go in and deal with this or ask the form tutor whether they think that the matter is settled. It's a really good system and it shows up patterns of behaviour. We always talk to all the form tutors at the beginning of the year about these issues. We emphasise that the most important thing is that the boys in their form get on and are nice to each other and are tolerant of each other. That is the overriding thing that we emphasise at the very beginning.**

JC: The school now gets 600 applicants for its assisted places. Could you explain to me how selection is done from that very large number?

**MM: All the boys, whether applying for an assisted place or not, sit the same exams early in Year 6 and there are three of them, English, maths and verbal reasoning. We also receive from every school a report. Once the rank order has been drawn up, we go through the results and the reports candidate by candidate and identify about 60 or 70 boys whom we think are the most deserving. In recent years, we have had about 20 assisted places to offer. A boy who is interviewed might be down the rank order, but he could also be a gem. When they come for interview their parents have a brief conversation with the bursary staff about their financial needs. As head of shells I am one of the team that interviews the boys as part of that process, when I am free in the**

**school week or on Saturday mornings. I sit with another member of staff, whether the chief master, or another member of the senior leadership team. We form lots of double acts with members of staff to interview for scholarships, assisted places and on the border line.**

**What we are looking for is a boy with spark, someone who can chat to you about stuff that they do, someone who can talk intelligently about something he might not have seen before. So, the system is trying to use the numbers from exams but also identify character, to use teachers' experience and intuitions.**

**DM: I have had a concern in the past that we have taken boys who have been over-coached: in Birmingham, with the grammar school system, coaching is everywhere, even for boys whose family may not have much money. Our own boys, when they are older, sometimes do this coaching.**

JC: So, now you've made your choices and the boys have been offered places for next September. That's finally announced in March. What happens between that moment and when they do actually come?

**MM: There is nothing we do that is specifically directed to the assisted place boys. We don't single them out. Boys who are coming from a school from which there are fewer than three coming to King Edward's – and that accounts for 60 boys out of 130 – are invited to an induction day. They do a series of different activities and it is likely that all of the assisted place boys will come to this. We also have the admissions ceremony for all the boys and their parents. This has a certain formality and splendour with every boy being presented to the chief master in 'big school', but these days there are tea and cakes outside and this is more fun than it used to be. There's a barbecue and existing parents are also there through the good offices of the Parents' Association. And, of course, we have the ice cream van there, as we do for all open days.**

**And the Parents' Association came up with the idea of contacting the incoming parents. There are two members of the Parents' Association committee attached to each of the forms and we share their contact details with all the new parents. The Parents' Association are also at the admissions ceremony, and at the shell parents' evening, which takes place three weeks into the first term.**

JC: So, there is nothing specific for the assisted place boys? Why?

**DM: When your ethos is integration, as it is here, to have any special group, whether it is a group of scholars or boys on bursaries would be anomalous, would be in opposition to the school's principles. During my tenure, I knew who the assisted place boys were and I kept an eye on them from a distance, but perhaps I should have shared it more. It was all in my head and I can reel off now all the boys who are now at the top end of the school who are on assisted places. I am not sure that's good enough. There needs to be a happy medium between no one knowing apart from me and too many people knowing and that affecting their attitudes.**

**MM: The information that a boy is on an assisted place is not on the data, which is shared with form tutors, but I think that it now is on our logging system, because I have put it on. Also, I would tell the form tutors on the first day which boys were on assisted places, just as part of the information that was shared to ensure that form tutors knew all relevant information.**

**DM: A few years ago, I put some boys from a similar background together in a form, believing that it would be beneficial for them, that it would make them feel welcome and happy but I think that meant that they stuck together too much. They were quite quiet kids anyway so that it gave them a way of not being integrated. It's not always easy to get it right.**

JC: Martin, you, as head of shells, would definitely know who the assisted place boys were.

**MM: I almost make an effort not to know. I do know and I can look it up on my computer. I try not to remember it so that I treat every boy the same. I try not to have it at the front of my mind. I think it's more important that I know they have a grisly journey from somewhere distant – lots of boys come a long way to school on public transport.**

**DM: On reflection, I think more people should know, but only in a discreet way and when it needs to be known.**

**There aren't many families with flashy holidays and we do have a lot of families whose holidays aren't flashy because they are funding the school fees. The whole place is far more homogenous than if we had 80% of boys from prep schools and a minority from junior schools.**

**And there is also the issue of behaviour. When they first arrive, the boys are coming from a wide variety of junior schools which can be very different in culture and behaviour.**

JC: Debbie, you say you look back on your time and think about what you might have done differently. What would those things be?

**DM: I am more keenly aware of the fact that boys who come here from a range of schools and backgrounds – and this isn't just the assisted place boys – might need more help to understand and adapt to the school they have come to. I feel, on reflection, that I should have engaged with them more. Perhaps I should have thought a bit harder about whether this boy was really involved in school life, going on a weekend walking trip, for example.**

**MM: On the other hand, we have never, as a school, tried to hide it. We have boys currently in the school appearing on the film produced to advertise the assisted place campaign. No one's bothered. Why should they be?**

JC: So, what else do you do as the boys enter the school and start in September?

**MM:** One thing that might be relevant is the way in which we place boys in forms as they arrive. I get all the data from the entrance examination and then I try to put the same number of scholarship boys in each form, the same number of assisted place boys in each form. I try to look at ethnicity so that each form is representative. And I also split boys up: if there are five boys coming from one school, I put them into separate forms. Even though some parents don't like that, lots of them do.

We also shuffle the forms each year in Years 8 and 9 and then they are shuffled again into a form for the two years of GCSE, so that, by the end of Year 11, we reckon that every boy will have been in a form with every other boy. I don't think it's important they are in lessons with their friends. They can always see their mates at break and, if they come with their friends on the school bus from Solihull or Walsall, they can spend their time together coming in on the bus.

We have a shell parents open session in late September where the parents are briefed and given the chance to ask questions about the story so far. Then there is a parents' evening in January to talk about progress and at that meeting it's just parents. It's only in the removes that the boys come along to that as well. We have also adapted the reporting system for the early days of their career. The first set of grades in the shells, at half term, do not go home to parents but there is a very simple internal mechanism to ensure that we know how each boy is faring, to pick up any causes for concern. They do get full subject reports at Christmas.

JC: Is there more that could be done to help the parents understand?

**DM:** It must be hard for parents to get a grip on it. Martin and I would always try to get around to all the parents, at admissions ceremony and induction day and the September information evening and talk directly to them. It is about having that personal contact and being encouraging.

We have tried to use some parents to help us to get to other parents.

**MM:** I think we have to try to be as 'normal' and down to earth as possible. We must write our letters in normal, friendly English. We want the admissions ceremony to have some sense of pomp and circumstance – I want to have a boy play the organ this year – but when I speak, I want it not to seem formal or academic. I want it to be friendly.

JC: One of the concerns is that not only might parents feel distanced from the school, but, as time goes by, they feel that they don't have the education to support their children's progress.

**DM:** I do worry about the boys who run the risk of ending up in no man's land, feeling that they might not belong at school or at home.

JC: This is something that Peter Ollis identifies in his thesis.

**DM:** I have been thinking about this and we do need to keep working on parents to

**help them understand why we think sport is important, why it is good to do drama or music, why he doesn't have to do sciences. Getting the boys to work isn't actually the hard part. It's getting them to do the other things.**

**MM: It's worth saying that we aren't talking about assisted place boys here. We are talking about our boys in general, coming from a wide range of backgrounds, whether they are being supported financially or not. It's about a massively diverse school in ethnic terms – and in so many other ways. The boys on assisted places are all from different junior schools, 14 from state junior schools and one from an independent junior school that does offer bursaries.**

JC: Debbie, you have now been taken up into responsibility for outreach. Could you explain to me how you think outreach relates to all this?

**DM: When we started serious outreach, it wasn't difficult to engage with lots and lots of inner-city schools. And we always did fine with the suburbs like Moseley and Kings Heath and Harborne. In those places, families were engaged with education. In the last two years we have been trying to get to schools that have not engaged in the past.**

JC: There are now many more boys on assisted places than there were when you both arrived. Does that matter to people?

**DM: I don't really notice and the staff rather take it for granted that it's the kind of school we are.**

**MM: I think the same: it's a diverse place by its very nature.**

**DM: I think that they would notice if they weren't teaching so many bright kids and the assisted place system does bring bright boys in. Extending the sliding scale of annual income has also made a big difference because it has meant that our assisted places are open to a much wider range of applicants.**

**MM: The assisted place boys have come high up in the rank order and five of them are scholars as well. The combination of scholarship and assisted place is very potent in attracting the boys to come, especially when there is such strong grammar school competition.**

JC: This has been enlightening. Thank you both.

### iii) A codicil: Six student voices

*Five years ago, King Edward's School set up a summer school for pupils from local junior schools. It takes place in the first week of the school's summer holidays and was originally funded by a former pupil. In the summer of 2019, it involved 90 pupils from a dozen different schools, half a dozen staff and 22 King Edward's boys who acted as mentors. The activities included art, music, a sports day, poetry, beekeeping and online learning.*

*By chance, at the time of her interview for this book, Debbie McMillan had asked a number of the King Edward's boys who were mentors their reasons for doing it. These are some of their unexpurgated answers.*

#### **Mentor 1**

Coming from a disadvantaged area myself, I feel like I can empathise with these children. The joy and excitement I felt when I got my 11+ and KES results are feelings which I wish every child could experience. My primary school never had many trips or activities outside of school, so I can understand how special this summer school could be to these kids, so I want to help make this a truly fantastic event. Finally, many children in areas such as Small Heath, where I am from, lack any kind of goals or dreams in life. Their parents may be on benefits, or working in informal jobs, and not many people from their schools will ever go to university. Being part of a summer school, which could help these children see what they're truly capable of achieving, and potentially changing their lives, is invaluable to me.

#### **Mentor 2**

I myself have been extremely lucky and grateful in coming to a school as prestigious as King Edward's. I come here on both a scholarship and assisted place myself, without which my parents would not have been able to afford the price for the school and I would not be where I am today. I want to be able to inspire children to aim for institutions as prestigious as King Edward's and believe that with enough hard work the pieces will fall into place for them to reach their dreams. I already oftentimes help out classmates who are struggling and I intend to become a mentor in the sixth form. I enjoy helping people, and I feel it is a great opportunity for both me to develop as a person and for those who are less fortunate or advantaged to be given a helping hand in enabling them to aim high in life.

#### **Mentor 3**

Being a beneficiary of the assisted places scheme, I feel very deeply about extending that scheme to others. I am aware that many parents do not apply to this school because they are either totally unaware of the scheme or that they believe that the scheme is only for an extremely select group of students. Therefore, I feel that through raising awareness through this summer school, I will be able to share in some way my own assisted place.

#### **Mentor 4**

Well, I feel there is no one better to inspire these kids, for I have experienced a lot of things they have been through and have overcome (and still suffer) many disadvantages: of income, (primary) schooling, background, family and illness. Others may have a scintilla of empathy or understanding. However, I have been through, go through and thoroughly grasp and consider their disadvantages. This is less about 'giving back' and doing my part (though I do feel it is a duty as a school, and myself as a beneficiary of its education, to help



those who do aim high but do not have the facilities or figures to do so). It is more to do with being a figure or role model for these pupils, to show that it is possible to break from the confines of your disadvantaged backgrounds. These kids most likely have an inspirational figure in their lives, but not aspirational figures. I had neither. Hence, I want to be, or at least try to be, that figure I never had myself, to show that innumerable prospects and possibilities exist – only if you are willing to challenge, change and conquer yourself and the status quo. To look towards KES or KEHS is good but not enough for me. I want them to aspire to anything and everything, if I can make them believe that it is possible. When I had a conversation with one of the pupils as to what he wanted to do when he was older (on the first day of summer school), I got the classic: "I dunno." Asking him the same question waiting outside the toilets for other boys (on the final day of summer school), he said: "Watch me become a footballer for Chelsea." I'm still smiling and waiting on that day.

### **Mentor 5**

Being a student of KES on an assisted place, I believe all children, no matter how disadvantaged, should be shown the accessibility of KES and be given the chance to attend a school like this without the worry of being bullied or left out for their disadvantages. I also believe many disadvantaged children have the ability and characteristics of future leaders and, given the chance to attend a school like KES, will be able to fulfil this aspiration far easier and with greater support. I also believe many disadvantaged children who grow up in underprivileged and crime-ridden areas may be drawn into this cycle of poverty and crime, so these children should be given the support and confidence needed to escape this harsh cycle.

### **Mentor 6**

A young person from a disadvantaged background will have experienced a very different type of lifestyle to those from a privileged background. Being a mentor means giving these pupils a vision of what they could do/achieve if they work hard. Having attended King Edward's School, I feel extremely blessed and privileged to have been part of a school community where pupils have everything available to help us achieve our best. My parents have been an important part of my admission at the school but I recognised that not everyone has access to the same opportunities as I have had since I began school. My faith is an important part of my life and it teaches to me to remember those who don't have the same privileges as I do – to care for and be compassionate towards those who need that extra help – and mentoring disadvantaged pupils I feel will give the opportunity to share the blessing that I have. Through marking mock exam papers from another school, it was quite sobering that some children do really struggle with exams and that it will limit their career prospects. This has made me feel even more strongly that all children should have access to the facilities, guidance and encouragement to allow them to achieve what they are able to. I hope my experiences, skills and knowledge have an impact on the young people I will teach and at the same time help to provide me with the opportunities to grow in developing my leadership and communication skills. Both which will help me to prepare for my future career.



## Chapter 15:

# The lessons learnt

So, I have returned to Ithaca. My Odyssey has taken only a year, so I haven't had time to blind a Cyclops or hear the Sirens – or spend seven years with the nymph Calypso – but what have I learnt? There are six key things:

### **i) Means-tested bursaries are a Good Thing.**

Every school that has been successful in widening accessibility through means-tested provision feels that this strategy has materially enriched and enhanced the lives of all those in the school. It's not just those who receive bursaries who benefit. Such provision not only offers opportunities for individual pupils but fulfils a school's moral, social and civic purpose. It can even strengthen a school in its academic purpose by enabling bright boys and girls from less affluent backgrounds to attend. In the end, a school that has greater socio-economic diversity is a more interesting, a more human place: a better preparation for the life beyond school. That is good for everyone: pupils and parents, staff, governors and alumni and the wider community. Heads often say that pupils, staff, alumni and parents all feel a stronger commitment and loyalty to their school because of the provision of bursaries. And, as far as I can tell, the more bursary pupils there are, the better.

The schools that are successful in bursary provision aren't doing it for any reason other than they feel strongly that it is a good in itself.

### **ii) Not every school can immediately provide a substantial bursary scheme.**

Means-tested bursaries may be, as stated above, a Good Thing, but that does not mean that every independent school can do it to the same extent or in the same way – and immediately. Those inside schools and outside schools need to understand that. There are a number of reasons for this:

- **Means-tested bursaries cost a lot of money.**

A 100% bursary for seven years at even one of the cheaper independent secondary day schools costs £80k. To provide such a place in perpetuity – at 3.5% return on capital – costs £325k. A 100% bursary for seven years at a more expensive independent secondary day school costs perhaps twice that, so the endowment figure would be in the region of £650k. A 100% bursary for five years at a boarding school might cost close to £200k and to endow such a place would cost over £1.14m. This obviously presents a significant challenge to those who are working towards 'going needs-blind'.

- **Not all independent schools are big and rich.**

For very many schools in the ISC, it's not easy to find the funds, whether from fundraising or from internal resources, to fund a bursary programme. The vast majority of schools just don't have historic endowments or large, grateful, affluent alumni or parent bodies. It's not hard to see why it's harder for prep schools or small, rural schools or girls' schools to find or raise money for bursaries.

- **Even big and rich schools don't always find it easy to provide bursaries.**

It's less obvious, but nevertheless true, that it's not easy for boarding schools because the amount of money needed to fund a bursary scheme that makes a difference can be massive.

- iii) **Different schools fund means-tested bursaries in different ways.**

This book has concentrated mainly on schools that have funded means-tested bursaries through fundraising, but that's not the only option. A school can find funds for this purpose from a variety of existing pots or even make some new ones: a school can cross-subsidise bursaries from fee income and it can do that with transparency or opacity; a school can use profits made from non-educational, commercial activities, such as the hiring of facilities; some schools can commit funds from their existing, often ancient endowment to that purpose; other schools are already transferring money spent on non-means-tested scholarships to means-tested bursaries; a small number of schools, like Colfe's with the Company of Leathersellers, can direct funds from an external source; and an increasing number of schools see the answer over the horizon in setting up schools overseas and using income generated to fund bursaries back in the UK.

- iv) **Some schools have been very successful at fundraising for bursaries.**

This book has enabled us to gaze upon – even listen to – some of the schools most successful in raising substantial sums for means-tested bursaries. These successes have made a material difference, even a historic difference, to those schools. More schools no doubt have an appetite to increase their scale of bursary fundraising but this will take time. It is worth remembering, the whole industry/profession of development and fundraising has only been in serious existence for just over 20 years and most independent schools are very small, with limited financial means to invest in development.

- v) **Bursary provision isn't only about the money and how you raise it. It's about how you spend it.**

The schools that are most deeply committed to bursary provision expend as much time and effort on finding the students who could benefit the most as they do on finding the right amounts of money. That is vital when the expense of bursary provision is so high and the impact on those whom schools choose – or don't choose – can be so great. If bursary provision is 'life changing', then schools, and those with whom they work, have to ensure that it is life changing for the better.

To that end, it is vital that three parts of the school's life – development, outreach and admissions – work together and understand each other.

- vi) **Means-tested bursaries may be a Good Thing, but that doesn't mean that the state will provide them.**

There have been times in the last 80 years when the state has collaborated with independent schools to make the sector more accessible to children of ability, whatever their means, through the Direct Grant scheme and the Government Assisted Places scheme. That ended in 1997 and, sadly, there aren't any real signs of a reprise. There may be talk of open access in various forms and in 2017, the ISC offered the Government the possibility of up to 10,000 extra, jointly funded places, each year. This was rejected, even though the offer is still there. However, that does not mean that nothing beneficial can come from

collaboration. A place to start is the work that Royal SpringBoard is doing with children in care and, perhaps, the more the independent sector is seen to be doing the right thing in accessibility, the more the state will be inclined to work with it.

### **Six More Things**

This book has meandered – or lurched – between the provision of bursaries and the raising of funds for bursary provision. The ‘Six Things I have Learnt’ are about the former and the ‘Six More Things’ are more about the latter.

From all that I have seen and from all whom I have met, I would argue that bursary fundraising is successful if, and only if, the following pillars are in place:

- **Authenticity**

Whatever a school does in bursary provision or bursary fundraising has to be true to its history, its identity, its values, its ethos and its long-term purpose. It has to be authentic. If it is authentic, then the whole school community – students, staff, former staff, governors, parents, former parents, future parents, alumni, even the local community – will understand it and be engaged humanly and emotionally and then support it. If not, they won’t, and it won’t work, no matter how good your development director or development team are. Part of authenticity may also be realism – understanding clearly what is possible and sensible for a school of a certain kind at a certain time.

- **Leadership and clarity of purpose**

‘Headmasters have powers at their disposal with which prime ministers have never yet been invested.’ This may or may not be true, and it may or may not have been said by Sir Winston Churchill, but I now realise, more than I ever did in my 15 years of headship, that the head actually does matter. And it certainly matters in the area of bursary fundraising. The head has to ensure that the whole wide world understands that this matters to him/her and why it matters, and the head has to ensure that he/she articulates that with clarity and consistency, at every opportunity, from common room meetings to speech days to open days to alumni biennial dinners. And the governors have to back it up, too – not, in my opinion, by just giving money to the cause, but by making it clear that they fully understand and support what the school is doing and by ensuring that the issue of development is always central to their deliberations. A bursary project will not succeed if there is the slightest sense that it is merely an attempt to stave off potential external threats.

- **Singularity of purpose**

This is somewhat more contentious but there may be no harm in that. I would argue that bursary fundraising works best when it is perceived as the single, central purpose of fundraising: when the school makes it clear that this is the thing that matters most and will matter most. The risk of this is that a school might thereby miss some potential donors who want to give to something else. That is a risk, but I still think it’s a risk worth taking so that the clarity referred to above is not clouded.

- **Commitment**

Martin Luther King Jr said: “Longevity has its place,” and that is certainly true in the case of bursary fundraising. Schools need to understand that this is not a short-term ‘campaign’ – I was often told off for wanting such a thing – but a long-term, generational strategy which will outlast even the longest-serving head or governor. And, since this is

so, schools need to commit time, energy, resources and personnel into this area and accept the fact that it's going to take some time. In the end, if it is well done, it is worth it. After all, a successful fundraising habit can bring in as much money as the school's entire educational operations.

In particular, this does mean that the head has to commit his/her own time and energy to the cause. From my experience, that didn't mean worrying about who was going to make the ask: it meant spending some time with some remarkable people whose talent and deep love for the school was exhilarating not only for me but for others in the school community whom they met. And it is vital that the head and the development director need to work together as 'yoke-fellows', sharing the burden and the experience and the plans and the success.

- **Structure**

All of the above, or most of the above, are necessary for success in raising money for bursary provision but, even all these five things are not sufficient. The school also has to ensure that there is a structure in place within which development can thrive. The first element of that structure is the development office itself. The development office and the development director have to do a lot of very different, and often difficult, things: they have to devise strategy and tactics; they have to keep in touch with thousands of people, alumni, alumni organisations, parents, past parents, staff and former staff, even pupils, by human and electronic means; they have to collaborate with other parts of the school machine, particularly admissions and outreach; they have to arrange events of different kinds and produce documents of different kinds; they have to ensure that all that is taking place conforms with legal and financial requirements of increasing complexity; they have to look after donors, past, present and future, small medium and large; and they have to ask for money, too, whether by phone campaigns or by asking some big questions in the right way at the right time. None of this can be done unless the development office has the right resources, the right expertise, the right scale of operation and the right support.

However, success requires more even than this. If fundraising for bursaries is to work, it needs to be understood by and valued by the whole school community. So, structures need to be set in place so that the development has the chance to be seen and explain itself to the governing body, to the common room, to alumni and parents and even to the students themselves. Development, like truth, dies in darkness.

- **Major donors**

The pyramid of giving is a well-accepted model for fundraising. It shows us the shape of giving: a small number of major donors at the top and a much larger number of smaller donors at the bottom. Of course, regular giving matters and phone campaigns contribute, and legacies have great significance in the longer term, but there is an important truth borne out not only by IDPE and Graham-Pelton's 'Schools' Fundraising and Engagement Benchmarking Report' but also by everyone's experience. Major donors are central to success and any fundraising campaign has to focus its attention here above all. And that isn't just because they give large sums of money. It is because their engagement, their passion and their generosity encourage and inspire others to the cause.

## Last Things

During the writing of this book, I engaged in an interesting dialogue with David Kynaston, the co-author of *Engines of Privilege*. At one point in that dialogue, Mr Kynaston asked the following two simple, and important, questions: *Can outsiders critical of the status quo realistically expect, over say a 10-to-15-year time frame, the private sector on its own (without state funding) to move – taking the sector as a whole – decisively and permanently from exclusivity to diversity in terms of social composition? And, again taking the sector as a whole, is it truly the case that private school parents value social diversity more than social exclusivity?*

After my travels, I genuinely believe that a positive answer can be given to both of those questions. There is no doubt that more schools are doing more than ever before to address the issue of accessibility. It is central to the strategy of the independent sector as a whole and I don't know of any head who is not thinking about such matters. Bursary provision and the raising of funds for bursary provision are a vital part of progress in this area alongside the ever-growing commitment to outreach, partnership and the sharing of resources and expertise. This is not only being undertaken by individual schools but also by larger institutions such as Royal SpringBoard. And, as for the second question, I have never seen anywhere any opposition, from parents or staff or governors, to the idea that independent schools should be more socially diverse.

As I have suggested above, this does not mean that every independent school will find it easy in a short period of time to substantially increase accessibility, not least when there are other substantial financial pressures looming. On the other hand, there are many schools, predominantly in the secondary sector, which have the capacity to do more and they probably have to lead the way – and then, over time, others will be able to follow.

I want to end with one small plea for the present and one big vision for the future. The plea is about transparency and clarity, and the need for such things. Even I, a battle-hardened reader of school websites, cannot always find details of what actually is on offer in terms of bursary provision, levels of provision and the machinery of application. And, if I feel that way, what might the disadvantaged child or parent of a disadvantaged child think when he/she tries to navigate this dark sea?

My big vision for the future goes like this and it is a development of some of the things I have heard said by some people on my journey. Very many of our schools were set up with a genuinely charitable purpose. Some of those same schools were set up with a charitable purpose and the funds to go with it and, often for hundreds of years, we have lived off that patrimony. Will there come a time – or, indeed, is this that time – when schools need to be thinking about the concept of refounding their schools, to reaffirm their purpose and to create a modern endowment so that, in future decades and even centuries, people will look back on us with the same gratitude as we look back on our founders, pious or otherwise?

## NOTES



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