



Trustees' Annual Report for the period

| | |
|-------------------|-------------|
| Period start date | From |
| Period end date | To |

| |
|------|
| 01 |
| 09 |
| 2021 |
| 31 |
| 08 |
| 2022 |

Charity name

FRIENDS OF STAFFORDSHIRE'S YOUNG MUSICIANS

Other names charity is known by

FOSYM

Registered charity number (if any)

1037650

Charity's principal address

c/o 375 STONE ROAD

STAFFORD

Staffordshire

Postcode

ST16 1LD

Names of the charity trustees who manage the charity

TAR

Trustee name
Office (if any)
Dates acted if not for whole year
Name of person (or body) entitled to appoint trustee (if any)

Steph Owen
Chair

1

Jenny Mason
Secretary
Secretary from January 2022

2

Valerie Martin
TAR

3

Treasurer

4

Marilyn Calvert

Secretary until January 2022

5

Michael Price

Trustee until October 2021

6

Cathy Lamb

8

Andrew Worrall

John Callister 9

The Music Partnership

10

11

12

Names and addresses of advisers (Optional information)

Type of adviser

Name

Address

Music education

Paul Hughes

Entrust, Riverway, Stafford

Section B

Structure, governance and management

Description of the charity’s trusts

Type of governing document
(eg. trust deed, constitution)

Constitution

How the charity is constituted
(eg. trust, association, company)

Association

Trustee selection methods
(eg. appointed by, elected by)

Appointed by Trustees and subject to re-election by members on a four year cycle

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

The charity continues to maintain a risk register, reviewed at every meeting of trustees. A declaration of pecuniary interest is noted at every trustee meeting. During the current year the charity has continued the process of revising its policies and procedures, led by the secretary. To support this the Charity has a governance group comprising the Chair, Secretary and Treasurer, which meets as required and reports to the Board of Trustees.

The Trustees operate under a Strategic plan for 2019-22.

The charity has no paid officers. It is managed by the trustees, reporting annually to members.

Members pay an annual, five year or lifetime membership subscription. In recognition of exceptional contributions to music education there is a category of honorary life members. Young musicians who are FOSYM award or prize winners are invited to become five-year members at no cost.

The charity works closely with The Music Partnership (The North West Midlands Music Education Hub) and Entrust Music Service Staffordshire. Entrust is a joint enterprise between Staffordshire County Council and Capita plc.

The charity is a member of The Music Partnership and an amendment to the constitution at the AGM in October 2019 enables the charity to hold charitable funds on behalf of other partners.

The Chair of the charity is currently the independent, non-executive member of the Music Partnership Board (TMP).

The charity has four Patrons: Prof. Yvonne Howard (opera singer), Tasmin Little OBE (violinist), Douglas Boyd (Conductor) and Mrs Margaret E Hassall BEM (Staffordshire musician and teacher).

The trustees recognise the value and importance of the charity's members. Members provide a touchstone for the activities of the charity and hold the trustees and officers to account. Membership has remained largely stable during the year at about 50. Members' subscriptions provide core funding for the charity. Volunteering to help at music education events and concerts is an important part of the charity's work and volunteers are drawn from among the members.

All trustees are required to be members. All trustees are required to have a basic DBS (Disclosure and Barring Service check) and these have been facilitated for FOSYM by Entrust.

Marilyn Calvert, retired as trustee and Secretary in January of this year. It was our privilege to work with someone with such passion and commitment to FOSYM. Marilyn was a font of all knowledge and a stickler for protocol. It is due to these qualities that FOSYM had gone from strength to strength under her guidance. Our team of volunteers was organised and supported most capably by Marilyn and we all valued her total focus upon and deep care for the young people and their families in need of our support.

Michael Price retired as trustee at the AGM in October 2021 but continues, as a member, to support the work of FOSYM as Membership Secretary.

Section C

Objectives and activities

Summary of the objects of the charity set out in its governing document

The objective of the charity is to advance the music education of children and young people resident in Staffordshire.

(Note: our definition of young people is those under the age of nineteen.)

Involvement in music has been shown to benefit young people in many ways including:

- increased motivation
- improved self-confidence
- a more positive attitude to learning
- enhanced aspirations
- greater empowerment and responsibility.

We have focussed our activity on widening participation wherever we have seen an opportunity, as well as recognising excellence both in musical talent and commitment to music education.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The key aspects of charity activity in this year have been:

- The work with Entrust Music Services Staffordshire in funding grants, under a Pupil Progress Initiative to enable pupils in need to receive music tuition and ensemble membership. In the last financial year, the funds made available increased by 100%. There is a robust but uncomplicated process for awarding and monitoring. The total number of children supported was 45, with 27 being at secondary school and at 18 primary level. Areas covered are Madeley/Lichfield/Tamworth/Newcastle/Burton/Stafford with a whole range of instruments, teaching staff and levels- from beginners and up to post grade 4. 3 percussionists are supported by Murfin Fund. The figures for the success of this are detailed in the Financial Review later in this report.
- The FOSYM website is well established and continues to be updated regularly with all aims, policies and processes, along with celebratory content featuring the young musicians, in line with safeguarding protocols. New materials, including business cards, flyers and pull-up banners are increasing the opportunities for FOSYM to reach out to support an increasing number of families and to raise awareness of our work more widely amongst the general public. Our profile is increasing in schools and amongst teaching staff as well as amongst friends and colleagues in local communities.
- The systems for communication between the Awards group and other trustees has been streamlined. There is no need to wait for meetings and speedy responses ensure timely delivery of funds to those in need. All documentation required for feedback can be collated easily and there is a clear evidence chain. Details of grants offered are in the treasurer's report.

- Pre pandemic, FOSYM used to hold an annual awards evening at which high achievers' successes, and those who had excelled in other ways, were acknowledged. During the past few years, in the main due to those circumstances beyond the charity's control, that hasn't happened. Trustees feel that it is timely to consider further, and possibly different ways in which the achievements of Young Musicians can be rewarded and celebrated. It is healthy to ring the changes and encompass perhaps a wider range of recipients than were previously identified, benefitting the many rather than the few.
- The Young Singer and Musician competitions, along with a new category of Young Composer this year, were superb. All aspects of the organisation, challenge and opportunities offered to the young people, by both the Music Service and FOSYM were praised most highly by both adjudicators. The support of Volunteers, acting as Ambassadors was extremely positive and augured well for increasing membership.
- The Trustees confirm that they have referred to the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in their grant making activities.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

The charity has remained very active, continuing its programme of developing its ways of working, making more grants than ever before, and being responsive to the changing environment in which it has had to work.

Governance.

All operating rules have been updated to reflect good current practice and any new guidelines, especially regarding safeguarding and data protection.
Extracts of these will be shared, where appropriate, as policies on website.

Section D
above

Achievements and performance: see C,

Section E

Financial review

Brief statement of the charity's policy on reserves

Reserves are retained in an interest-bearing account provided by Stafford Railway Building Society.

Details of any funds materially in deficit

N/A

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Please refer to Treasurer's Narrative Report (uploaded) for full details.

Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity’s trustees

Signature(s)

Steph Owen

Full name(s)

Stephanie Owen

Position (eg Secretary, Chair, etc)

Chair

Date

19 October 2022

FOSYM Annual General Meeting 5th October 2022

Treasurers Report

Accounts for 1st September 2021 to 31st August 2022

The Treasurer submitted The Statement of Accounts and supporting documents to Deans, Chartered Accountants for independent examination on 6th September 2022. The documents provided comprise as follows:

- Receipts and Payments from 1st September 2021 to 31st August 2022
- Accumulated Fund for the Accounting Year
- Statement of Accounts 31st August 2022 – Allocated Funds
- Bank Statements and other supporting evidence
- Reserves Annex A

Income:

Following the easing of Covid restrictions, The Music Service and FOSYM have been able to resume a number of events which have in turn supported revenue. An additional sum has also been received from Partners, providing a combined total of £57,124.48 as categorised:

- Membership Subscriptions £354.18 which includes fourteen new members
- Interest from the Stafford Railway Building Society Account of £116.66
- Donations £4,813.18
- Programme sales, raffles, refreshments sales from events - £1,515.97
- Funds raised from Staffordshire Young Musician and Singer event - £324.49
- Additional Partnership funds of £50,000.00*

The Charity has been fortunate to receive many donations over the year from many sources. The Treasurer, on behalf of FOSYM would like to thank everyone who has contributed to its funds; all are equally welcomed.

Of specific note are:

- Mr and Mrs G Bebbington's continued support (Lavey Fund) of £500.00
- Stafford WI Singers and Friends £2,000.00
- Stafford Rotary £454.00
- Donations in the Memory of the Late Mr Philip Harrison £424.00

Our thanks go to the Music Centres of Stafford, Lichfield & Rugeley and Tamworth, their staff and supporters who have worked so hard, and given so generously. Thanks must also go to everyone involved with the YM/YS Event. These events coupled with the drive to increase members has seen an increase of fourteen new members. This figure includes two Alumni.

Partnership Funding*:

In the last year the charity has increased its holding on behalf of The Music Partnership with an additional sum of £50,000. FOSYM's constitution permits the charity to hold funds from likeminded partners for use in line with the Charity's Objectives. The resource is held in a restricted fund specifically for the following purpose:

"FOSYM are holding funds provided by Entrust Support Services Ltd., to assist with Music Education Recovery work in schools over the coming years as the sector bounces back from the disruption caused by the Pandemic. These funds will provide new and bespoke interventions. They will help to break down the barriers to music activities that can stop children receiving their educational entitlement to a quality music education in the current complex climate. Funds will be allocated and released through regular dialogue between Entrust and the trustees of FOSYM."

Expenditure:

Spend has been within the budget agreed by the Trustees in November 2021. Total expenditure, including spend from the Musical Education Recovery (MER) fund, totals £23,625.46 for the year as detailed below:

- Pupil Progress Scheme £6,444.00
- YM/YS Event £1,308.39 (incorporates £1,045.00 of prizes)
- Grants to students £1,902.00
- Grants to Music Centres £138.50
- Administration £879.74
- MER spend £12,790.99
- Amount passed to Stoke Friends from a donation £161.84

Pupil Progress Scheme:

Due to the increase in budget allocated against the Pupil Progress Scheme this year, Entrust Music Services has been able to reach a greater numbers of young people. To this end FOSYM has provided the amount of £6,444.00, supporting forty-four pupils, in contrast to twenty three pupils in 2020/21. The total cost includes fees for three percussionists of £412.00 which has been costed against the Murfin Fund, a specific fund reserved for this area of instrument study.

Grants to students:

FOSYM has provided six grants to students during the course of the year amounting to £1,902.00. These have ranged from supporting the purchase of

instruments to further develop an individual's progress to lessons in singing and guitar.

Staffordshire Young Musician and Young Singer Event:

This year's event was able to take place face to face for the first time in two years. Categories were expanded to enable competitors from three age groups for each of the instrumental and singer events. A new category of composer was also included for each field. Prizes totalled £1,045.00.

Music Education Recovery:

The spend from this restricted fund includes the following:

- LAC music lessons
- School recovery funding providing new tuition in twenty three schools
- Special School specific funding

The full 2021/22 expenditure figure of £23,625.46 is split between Unrestricted Funds at £10,834.47 and the Restricted Music Recovery Funds (MER) of £12,790.99.

Other expenditure includes general administration, such as insurance renewal, annual website costs, advertising material (postcards/ business cards/ roller banners) and in developing greater awareness of FOSYM and its purpose.

Treasurers Comments:

No call has been made on the Covid Fund budget line in this financial year and as such may indicate that those funds allocated should be considered for re-allocation in the budget planning for 2022/23. It is also noted that no spend has again been made from either the FOSYM Awards or the Lavey Fund, as was the case in 2020/21; although this is attributed to the disruption caused by the Covid Pandemic and in the gradual return to services. The Treasurer recommends that Trustees give renewed consideration as to how the awards previously made under these two categories can be either re-instated or re-shaped to further give young people benefit and to celebrate individual success in the future.

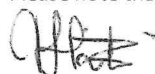
In summary, 2021/22 has been a successful year financially with a healthy year-end accumulated holding of £150,943.41.

V Martin
Treasurer for FOSYM
6th September 2022

FRIENDS OF STAFFORDSHIRE'S YOUNG MUSICIANS
ACCOUNTS from 1 September 2021 to 31 August 2022
Registered Charity Number 1037650

| | 31 August 2022 | 31 August 2021 |
|-----------------------------------|--------------------------|--------------------------|
| <u>Funds</u> | | |
| Unrestricted | £ | £ |
| Balance b/fwd | 67,424.39 | 80,183.90 |
| Income | 7,124.48 | 1,621.97 |
| Expenditure | (10,834.47) | (14,381.48) |
| Balance c/fwd | <u>63,714.40</u> | <u>67,424.39</u> |
| Restricted | | |
| Balance b/fwd | 50,000.000 | - |
| Income | 50,000.000 | 50,000.000 |
| Expenditure | (12,790.99) | - |
| Balance c/fwd | <u>87,209.010</u> | <u>50,000.000</u> |
| Total | <u>150,923.41</u> | <u>117,424.39</u> |
| <u>Cash at Bank</u> | | |
| Stafford Railway Building Society | 147,428.58 | 112,811.92 |
| Co-Operative Bank | 3,494.83 | 4,612.47 |
| | <u>150,923.41</u> | <u>117,424.39</u> |

A further £50,000 income was received as designated Partnership funding by Entrust.
Please note that a sum of £20 is held as cash in hand and is not relected in the above figures.


Valerie Martin
Treasurer

Date: 13/10/22

FRIENDS OF STAFFORDSHIRE'S YOUNG MUSICIANS
ACCOUNTS from 1 September 2021 to 31 August 2022
Registered Charity Number 1037650
Receipts and Payments Account

| | 2022 | | | 2021 |
|---|-------------------|------------------|------------------|------------------|
| | £ | £ | £ | £ |
| | Unrestricted | Restricted | Total | Total |
| Income | | | | |
| Membership subscriptions | 354.18 | - | 354.18 | 270.32 |
| Donations | 4,813.18 | - | 4,813.18 | 1,132.82 |
| Sundry concert/event income | 1,515.97 | - | 1,515.97 | 10.00 |
| Young musician/singer competitions | 324.49 | - | 324.49 | - |
| Building society interest | 116.66 | - | 116.66 | 208.83 |
| Partnership funds income | - | 50,000.00 | 50,000.00 | 50,000.00 |
| Total income | 7,124.48 | 50,000.00 | 57,124.48 | 51,621.97 |
| Expenditure | | | | |
| Awards young musicians/young singer | 1,057.92 | - | 1,057.92 | 1,340.25 |
| Fees young musician/young singer | - | - | - | 600.00 |
| Trophies | 250.47 | - | 250.47 | 180.00 |
| Administrative costs | 879.74 | - | 879.74 | 912.75 |
| Grants to individuals and groups | 2,040.50 | - | 2,040.50 | 971.00 |
| Pupil progress grant | 6,444.00 | - | 6,444.00 | 3,761.33 |
| Covid-19 Support | - | - | - | 6,616.15 |
| Payment to Stoke Friends | 161.84 | - | 161.84 | - |
| MER | - | 12,790.99 | 12,790.99 | - |
| Total expenditure | 10,834.47 | 12,790.99 | 23,625.46 | 14,381.48 |
| Total (expenditure less income)/ income less expenditure | (3,709.99) | 37,209.01 | 33,499.02 | 37,240.49 |

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
FRIENDS OF STAFFORDSHIRE'S YOUNG MUSICIANS**

Independent examiner's report to the trustees of Friends of Staffordshire's Young Musicians

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 August 2022 which are set out on pages 1 to 2.

Responsibilities and basis of report

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Deans

Susan Whiting
Deans
Chartered Accountants
Gibson House
Hurricane Court
Hurricane Close
Stafford
ST16 1GZ

Date: *13 October 2022*