

# MUSICAL CONNECTIONS

England & Wales · Charity number 1165993

## Details

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**Status** Registered

**Legal form** CIO

**Registered** 2016-03-10

**Register** [View on the Charity Commission register](#)

## Contact

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YO1 0HL

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**Website** [www.musicalconnections.org.uk](http://www.musicalconnections.org.uk)

## Activities

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**Objects:** TO PROMOTE SOCIAL INCLUSION FOR THE PUBLIC BENEFIT BY PREVENTING PEOPLE FROM BECOMING SOCIALLY EXCLUDED, RELIEVING THE NEEDS OF THOSE PEOPLE WHO ARE SOCIALLY EXCLUDED AND ASSISTING THEM TO INTEGRATE INTO SOCIETY IN PARTICULAR BY:- PROVIDING PARTICIPATORY MUSIC AND, WHERE FEASIBLE, RELATED ARTS ACTIVITIES- PROVIDING TRAINING TO HEALTHCARE PROFESSIONALS, CARERS AND OTHERS WHERE APPLICABLE FOR THE PURPOSE OF THIS CLAUSE 'SOCIALLY EXCLUDED' MEANS BEING EXCLUDED FROM SOCIETY, OR PARTS OF SOCIETY, AS A RESULT OF ONE OF MORE OF THE FOLLOWING FACTORS: OLD AGE; ILL HEALTH (PHYSICAL OR MENTAL); OR AS A RESULT OF BEING A MEMBER OF A SOCIALLY AND ECONOMICALLY DEPRIVED COMMUNITY.

**Activities:** We run participatory music sessions and projects for older, isolated and vulnerable people in care and community settings across York. We also run a large programme of intergenerational events and activities, which bring together beneficiaries with local school-children and students. We provide free transport for anyone who needs it and are supported by a team of dedicated volunteers.

## Classification

- **How:** Provides Services
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives, Disability, Arts/culture/heritage/science
- **Who:** Elderly/old People, People With Disabilities, Other Defined Groups

## Geography

- City Of York
- North Yorkshire

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£89,823	£90,209	-	-
2024-03-31	£97,561	£86,077	-	-
2023-03-31	£80,849	£83,801	-	-
2022-03-31	£100,774	£72,914	-	-
2021-03-31	£57,806	£68,741	-	-

## Trustees

Name	Role	Appointed
<b>Steven Howard Burkeman</b>	Chair	2024-11-27
Anna Elizabeth Harrison		2025-11-01
Beverley Taylor		2025-11-26
Chris Bartram		2016-12-02
Fiona Jane Clague Chapman		2024-04-24
Janet Lynn Broughton		2024-11-27
MRS JO FARRINGTON		2016-02-26
Richard Frost		2019-03-06

**MUSICAL CONNECTIONS**

England & Wales - Charity number 1165993

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# Accounts

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*Happier, healthier lives through music*

## **Musical Connections Annual Report and Financial Statement**

31<sup>st</sup> March 2025



Reg. Charity No: 1165993

T: 01904 373011

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# ORGANISATIONAL DETAILS

**Type of Charity:** Musical Connections is a CIO (a Charitable Incorporated Organisation).

**Charity Registration Number:** 1165993

**Date of Registration:** 10th March 2016

**Postal Address:** PO Box 724, York, YO1 0HL

## **Trustees:**

Steven Burkeman (Chair)

Jo Farrington (Treasurer)

Chris Bartram

Janet Broughton

Hazel Brown

Fiona Chapman

Richard Frost

**Bank:** NatWest, City Centre Branch, 1 Market Street, York, YO1 8SR

**Accountants:** Outsource, 29 Millfield Road, York, YO1 8SR

Over the last year, our project team has consisted of two Project Managers, who are also musicians, and 3 more self-employed musicians. In April 2024, our longstanding Chair of Trustees, Val Sutton, retired, after 15 years of service to the project. Project founder and trustee, Fiona Chapman, stepped into the role on an interim basis, and in November 2024, Steven Burkeman was elected as our new Chair. At the same time, Janet Broughton was also elected to join the Board. Together, the Board of Trustees has continued to play an active role in supporting the team.

# GOVERNANCE

## **Election of Charity Trustees**

Clause 10.1 of our constitution states that ‘apart from the first charity trustees, every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees’. Clause 10.2 states: ‘In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO’.

## **Additional Governance Information and Organisational Structure**

Musical Connections’ board of trustees is both experienced and active, bringing together a range of skills and expertise. Our Chair was previously Chief Executive of the Joseph Rowntree Charitable Trust, a role he held for 19 years until 2001. In 2010, he joined the Board of Jessie’s Fund – a York-based national music charity supporting children with additional and complex needs or serious illness. He brings considerable expertise from across the charity sector and in the role of Chair, and since joining our Board in November 2024, has inspired new ideas and brought a freshness to our work. He has been ably supported by the rest of the trustee board, which includes a retired GP, a former marketing manager, a former senior Music lecturer from York St John University, an English lecturer from The University of York, who is the daughter of one of our members, a retired chartered engineer, who is also one of our choir members, and Musical Connections’ former Project Director, who led the project for 13 years and has continued to write grant applications in support of the charity. Together the board is well equipped to provide oversight and guidance for the project.

Our Project Managers have been dedicated members of the Musical Connections (MC) team for several years and are much-loved by MC beneficiaries in both care and community settings. They took over from the outgoing Project Director (who continues to mentor them in her role as a trustee) in July 2022, and have led the project with skill and indefatigable enthusiasm ever since. Highly skilled musicians themselves, they provide strong leadership and support to the team’s other musicians, who are also adept in working with vulnerable older people who have a range of needs, interests, and abilities.

Over the year, we have run:

- 339 music sessions with 359 beneficiaries in care and community settings across York
- A 4-session summer project involving members from several of the above groups, culminating in a city-centre busking event
- 37 intergenerational workshops, concerts, and projects, involving 715 children and young people
- 21 additional community-based events involving a further 280 vulnerable and older adults

We have also:

- Produced 2 collaborative video recordings involving contributions from group members and intergenerational partners
- Continued to build on the strong sense of 'family' that we developed with group and choir members during the pandemic

To ensure members have been able to access as many of these activities as possible, we have provided free transport for anyone who needed it and worked with a dedicated team of volunteers who have undertaken several different roles.

## **Risk Management**

The Board of Trustees considers that they have complied with their duties to have due regard to the public benefit guidance published by the Charity Commission, and work collectively to review risks, systems, and procedures on a regular basis. One of the Project Managers is the Designated Safeguarding Lead, and one of our trustees is the Deputy Safeguarding Lead.

# BACKGROUND AND OBJECTIVES

## Background

2024-25 has been a year of evolution and development for the charity, including new partnerships with local charities and organisations, and an increase in intergenerational and community-based events. There has also been a slight change to the structure of the project. At the beginning of 2024, one of our City of York sheltered housing scheme groups suffered several deaths and diminishing membership. After speaking to the Residents Committee, we made the decision to close the group and instead, began visiting a new private-care home on a fortnightly basis. In June 2024, it became clear that the care-home wanted occasional entertainment rather than a regular music group, and since then, we have been developing our work in several other private care-homes instead – visiting each on a rolling basis to ensure that we fulfil our projected number of sessions per year. At a similar time, we also expanded one of our community choirs to be run in partnership with The Wilberforce Trust, a local charity supporting people living with a visual impairment. This has been a positive development, resulting in a wider scope of people participating in our work.

## Objectives

- To advance the wellbeing of vulnerable and socially isolated older people
- To relieve isolation and social exclusion amongst vulnerable people
- To provide opportunities to vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

# ACTIVITIES DELIVERED AND BENEFICIARY NUMBERS

Over the course of the year, the following activities were delivered by our team of dedicated musicians:

- **339** music sessions with **359** beneficiaries in care and community settings across York i.e.:
  - o 2 City of York Council's sheltered housing schemes - advertised to and well-attended by members of the local community, as well as people living in the schemes
  - o 3 private care-home groups (2 weekly, and 1 on an ad-hoc basis rotating between multiple care homes in York)
  - o 3 in partnership with York Medical Group (as we had to move out of their surgeries, York Medical Group has covered the cost of alternative venues nearby)
  - o 2 community choirs
- **4-session** summer project involving members from several of the above groups, culminating in a city-centre busking event
- **37** intergenerational workshops, concerts, and projects, involving **715** children and young people
- **2** collaborative video recordings involving contributions from group members and intergenerational partners, e.g.:
  - o A Summer recording of Reach:  
<https://youtu.be/0sSOBF6TbGE?si=15enRwxFy0eJZ7uH>
  - o A Christmas recording of A Spaceman Came Travelling:  
<https://www.youtube.com/watch?v=SQuIQR039Vc>

- **21** additional community-based events involving a further **280** vulnerable and older adults, such as informal concerts at Age UK day clubs, carol-singing, and formal concerts with other choirs in traditional concert venues e.g., the Joseph Rowntree Theatre

Free transport was provided for anyone who needed it, to enable them to attend both weekly sessions, and additional community-based events.

Alongside the groups, our musicians and volunteers have stayed in touch with group and choir members between sessions, ensuring everybody has had the information and support they have needed to be able to attend sessions, and to identify where extra help may be required.



# 2024/25 AT A GLANCE

Over the course of the year, 359 beneficiaries have taken part in weekly music and singing sessions, plus c.280 additional vulnerable older people who took part in 21 additional, one-off events in the wider community. In addition, 715 children and young people from a local nursery, schools and universities took part in 37 intergenerational activities with beneficiaries. 57 people, who would otherwise have been unable to get involved in community-based creative activities, made use of our offer of free transport.

58 INTERGEN- ERATIONAL/ COMMUNITY SESSIONS ORGANISED		715 CHILDREN AND YOUNG PEOPLE INCLUDED IN THE PROJECT
	339 WEEKLY/ FORTNIGHTLY MUSIC SESSIONS	
639 PEOPLE REACHED DURING SESSIONS AND EVENTS		5,023 ATTENDANCES REGISTERED ACROSS THE WHOLE PROJECT

## SOME HIGHLIGHTS OF THE YEAR

In July 2024, we were delighted to celebrate Musical Connections' 15<sup>th</sup> Anniversary Concert at the National Centre for Early Music. Attended by members from many of our groups, York's Lord Mayor and her entourage, plus friends, family, and project supporters, the evening was filled with Musical Connections



performances, contributions from University of York students, and opportunities to reflect on the digital work that we introduced during Covid-19. Beneficiaries enjoyed interacting and connecting with the wider community, meeting friends from different Musical Connections groups and were clearly uplifted by the sense of purpose and positivity they experienced through participating in such an important celebratory event. As the Lord Mayor said, "it was a wonderful celebration of community music-making, friendships, and the evolution of the MC project over the last 15 years".



Following that, our Project Managers, Abigail Noble Coates and Charlotte Yandell took part in Jane Tomlinson's Run For All York 10K – a high-profile event designed to help raise money for charities both locally and nationwide. With generous donations from group members, project supporters, and friends and family of MC, their fundraising efforts raised over £2,000 – an indication of how important people consider Musical Connections groups and choirs to be in their lives.

# IMPACT ON PARTICIPANT WELLBEING

Feedback from beneficiaries suggests that the work we have done over the last year has had a significant positive impact on their wellbeing.

During two tracking phases (October 2024 and March 2025), 139 beneficiaries completed feedback questionnaires.



-**99%** said coming to Musical Connections **improved their mood** on the day (**9%** said **greatly**):

*No matter how I feel on arrival, I always feel much better when I leave.*

*Since joining a couple of months ago, I find this group very friendly and easy to talk to. I always feel uplifted after I have been.*

*I always feel in a better mood and brighter after each session.*

- **100%** said that weekly sessions make them **feel generally happier and more positive about life** (**84%** said that they **greatly** improve their happiness):

*Our slogan Sing Yourself to Happiness is true! The sun always shines on our group.*

*I lost my partner to COVID, so it is nice to feel joy again.*

*I really enjoy being a member of The Rolling Tones. I love that it's such an inclusive and fun group and the fact that it always feels stress-free.*





- **96%** said that participating in their MC group **improves their confidence/self-esteem (68% said greatly):**

*This choir is the only one I have ever been to where I have not felt nervous or worried about going or been worried about not fitting in.*

*I find singing challenging, but joining the group has really helped my self-esteem.*

*I lost my confidence in singing but since coming to the group it's really coming back.*

*I am part of a community, and this helps so much with my shyness and self-worth.*

- **97%** said that their MC sessions help them to **feel more alert and active:**

*I really enjoy our fun warmups before we start singing.*

*It makes me come alive and feel as though I'm directing my energy in a positive way.*

*It wakes me up and makes me feel more alive!*

- **100%** said that participating in the sessions **gives them a sense of purpose and something to look forward to:**



*I love the positive atmosphere of MC and the Rolling Tones and always look forward to Tuesdays.*

*A date and time in the diary help to keep me going, it's something to look forward to.*

- **99%** said that participating in MC events and sessions gives them an opportunity to make



**increased contact with other people/the wider community.** For many, it is the only regular social and creative activity available to them:

*I'm getting to know more and more of the choir members. It's lovely to feel included.*

*I always enjoy going out and taking part in the busking and other singing events whether it's school, church, community centres... talking to other people about what MC is and the MC community.*



- **98%** said that they have **made new friends** since joining the group:

*I just love coming and being with all my friends. They all look after me and we're all big happy family together.*

*I enjoy being in The Rolling Tones because everyone is so kind and helpful – I'll get by with a little help from my friends.*

*Over the years I've made friends from all different walks of life and life-long friendships too.*

- **98%** said that going to their MC group **improves their overall life satisfaction** and **59%** said it improves **greatly**. Weekly sessions and additional events in the wider community appear to give people who are struggling with loneliness something positive to think about and to draw upon during difficult times.

*I have sung in choirs for most of my life and MC have made it possible for me to keep doing that. My husband is 95 and really appreciates the fact that I can get out and do something for me.*

*Being part of the MC family is a pleasure. The musicians and group members make my life better through the friendship and the happy times we share.*



- **100%** said that MC sessions **improve their overall wellbeing**.

*Having to miss sessions when I was unwell made me realise how important the group is for my wellbeing.*

*I look forward to our choir days and come out walking on air.*

*Lovely group of people. It's the highlight of my week!*

- **94%** believe that participating in sessions **improves their physical health**. The focus and concentration needed to engage fully in session activities helps reduce rumination, anxiety, and stress, giving people a sense of clarity and helping them to feel calmer and more centered:

*I think singing helps with my breathing.*

*I get exercise getting there and singing is good exercise too.*

*It helps my COPD lung function.*



- The work that we did throughout the coronavirus lockdowns had the effect of making our musical community stronger and closer than it was before. This sense of connection has been sustained, with many members continuing to refer affectionately to 'Our Musical

Family'. **100%** said that they continue to **feel a valued member of the MC family** and **65%** said **greatly**.

*It's lovely to feel accepted and valued by other people.*

*I'm always made to feel very welcome, and everyone is very helpful to me. It's a highlight of my week.*

*I feel a valued member of the team; I love that if you miss a week others (and Charlotte) will help you catch up with the music.*

*Abby and Charlotte do a wonderful job at of bringing people together, no matter what age or ability.*



## Social Prescribing

Musical Connections has worked with York Medical Group (YMG) as a social prescribing partner since 2018. No longer able to base ourselves in their surgeries due to post-Covid protocols, we have found alternative venues for these groups in the wider community, with YMG covering the rental costs for us. Despite the loss of contact with patients in the surgeries, the Chief Executive of YMG, Zulf Ali, remains hugely supportive of our work and our strong relationships with YMG and their link-workers continue to ensure a steady stream of referrals.

Over the last 7 years, social prescribing has become a city-wide initiative, with widespread acceptance of its ability to provide patients with legitimate non-medical solutions to their problems. This has helped us to become better connected to NHS link-workers representing other primary care networks and we now receive regular referrals from them. We have also recently joined the Power of Music Learning Network – an online platform supporting organisations who are using music to improve people’s health and wellbeing. Following this, the Operations Director at the National Academy for Social Prescribing, Bev Taylor, expressed her appreciation for our work and later invited us to share our learning at an online webinar in March 2025.

## DIGITAL ACTIVITIES

Whilst our most vulnerable beneficiaries need far more intensive digital support than our small team can provide, we have continued to support those group members who are keen to engage with technology, and have also tried to involve other, more able members of the project. This has proved beneficial, and 57 members of three of our York Medical Group choirs are now using tablets to access song lyrics during their weekly sessions. We have also continued to explore ways in which we can make the digital world slightly more accessible, including regular collaborative video recordings.



# MUSICAL CONNECTIONS' MAGIC INGREDIENTS

Over the 16 years that Musical Connections has been running, including throughout the coronavirus pandemic, we have seen how these ingredients have combined to create a formula which has enabled us to consistently deliver a creative, high-quality, and adaptable project which has become greatly valued in York, both by its beneficiaries and by the wider community, including healthcare professionals.



## IN MORE DEPTH:

### Clear Values and Carefully Considered Working Practices

The following characteristics are cornerstones of our work:

**Continuity:** Our ongoing commitment to providing a continuous programme of sessions, events, and related activities (structured loosely around the academic timetable) ensures that friendships and community connections continue to flourish between members of ‘our musical family’ – a phrase coined during the lockdowns, and which reflects the closeness of the relationships that have developed over the years.

**Inclusivity:** We welcome any older person who wishes to join us, regardless of ability or disability. We do not believe in compartmentalising people and have been told, particularly by people living with dementia, that they prefer not to be pigeon-holed as such, but would rather mix with other members of the community as they would have done before their diagnosis.

We have become known amongst social prescribers and other sign-posters for our flexibility and willingness to provide the support needed to enable people to get involved and to circumvent any obstacles which prevent potential beneficiaries from joining us.

**Avoidance of stereotyping:** We do not make assumptions about participant preferences and invite them to engage with all kinds of musical genres and activities. In concerts and city-centre busking this year, members pulled off fantastic performances of songs by artists such as Adele and Coldplay.

**Providing opportunities to learn and achieve:** Beneficiaries, including those with learning disabilities or dementia, have repeatedly demonstrated that they enjoy and are stimulated by being offered a degree of challenge e.g., learning and composing new songs. Simply re-visiting old favourites can get boring after a while.

**Building on participant skills and interests:** Where participants have shown a particular talent, we have worked hard to celebrate it. Likewise, group/choir members who wish to are invited to perform at our intergenerational and community-linked events.

**Good relationships between the project musicians and carers/staff in care settings:** Our team works hard at developing positive relationships with others who have responsibility for the welfare of our beneficiaries. We aim to develop an understanding of each other’s issues, and to develop mutual respect, which ensures that the project is delivered collaboratively, with a shared focus on how to maximise benefits for participants:

*Heather looks forward to coming to choir and enjoys getting her folder ready on a morning. She is always welcomed in a friendly manner and feels part of the community. It’s been a really positive part of her routine.*

**Ensuring participants are fully involved in evaluation and planning activities:** While most participants tell us that they would rather be making music than discussing the process/project, they appreciate being asked for their opinions about their group, and for guidance on its future development. In an extension of this work, we have included 'MC in Conversation' interludes during weekly sessions, which has helped to provide extra insight and support for the team over the last year.

**Disciplined and focused tracking and evaluation activities:** Involving beneficiaries and volunteers in the following activities has given us great insight into the impact of our work, enabling us to move forwards with confidence and an understanding of what beneficiaries need and value:

- A mix of data-collection approaches i.e.: individual interviews, group sessions and video-making has maximised the extent and type of information gathered. Please follow the link to watch a short video featuring feedback from some of our members:  
<https://www.youtube.com/watch?v=lo59o3fmYEO>
- Where participants have struggled to understand the process, adapting questioning styles to meet the needs of each individual has facilitated their involvement
- To gauge the accuracy of the information gathered by the musicians in their self-evaluation activities, trustees have visited individual groups to observe sessions and talk to participants

Continuous review of the process has optimised participation in it and the usefulness of the information collected.

## **Support Offered to Beneficiaries Between Sessions**

Our musicians and volunteers work incredibly hard to maintain contact with beneficiaries between sessions, helping them to sustain the connections formed within the groups, and identifying the support needed for them to access as many as possible of the numerous musical activities on offer. As a consequence of this additional work, we can say with confidence that we do not just offer participants a weekly creative outlet, but a much more profound social and creative framework which, over time, becomes the bedrock of many beneficiaries' lives, giving them friendship, a sense of belonging and numerous experiences to look forward to and to enjoy together.

## Creative, Skilled and Dedicated Musicians

Our musicians work hard to achieve a balance between accessibility and providing a level of challenge which requires focus and application from group participants. An emphasis on developing musical understanding and offering more complex experiences than traditional singalongs is appreciated by beneficiaries who are keen to use their brains and skills and to embrace an opportunity to learn and experience something new without feeling any pressure.

The musicians provide a welcoming and supportive environment for these activities to take place and fully understand that, while the music gives group members focus and purpose, the groups need to be delivered in a way that maximises relationships with and between everyone involved – the musicians all know that, ultimately, the purpose of the music is to facilitate these relationships and is not an end in itself. This knowledge and understanding are what helps them to deliver our project so effectively – and is also what drives them to stay in contact with some of our most vulnerable members between sessions – they appreciate that ‘our musical family’ extends beyond the boundaries of session times.

The musicians also have considerable digital abilities, which have enabled them to support beneficiaries who have wished to develop their own digital skills.

## A Sizeable Volunteer Team

Over the year, 41 volunteers have supported the project, with 9 of these as regulars, and 27 students who have worked with us on an ad-hoc basis:



Our beneficiaries benefit hugely from the volunteers' contributions:

*When I'm at Musical Connections, Sally always sits next to me and supports me, which I really appreciate. She's lovely and I miss her when she's not here. She makes me feel safe in the group.*

It is apparent that the volunteers enjoy their work with us and benefit just as much as our primary beneficiaries from the social connection and musical participation that the groups offer them. They are also inspired by the opportunities the project presents for them to use their skills and time in support of others.

*It's a lovely project to be a part of. All the things I did over the Christmas period really picked me up – I felt useful, and I had some lovely conversations with members of the group.*

*Speaking on behalf of the University of York's Music Education Group, we've thoroughly enjoyed volunteering with MC. It's so rewarding running the workshops, and lovely seeing people enjoying the activities that we've planned.*



In questionnaires conducted with **17** volunteers, **ALL** said that volunteering for MC **improved their mood** that day):

*I feel better having engaged and participated in helping the local community.*

*It's a great break in the week away from the stresses of university where I can reconnect and take a pause.*

- **ALL** said that it made them feel **generally happier and more positive**:

*I really like being able to share my interest and enjoyment of music with other people. It's great to make music accessible and to see the happiness it brings.*

*It's lovely to speak to a different age group and connect with people in a positive environment. I always leave feeling fulfilled.*

- **ALL** said volunteering had helped to **improve their confidence:**

*Talking with lots of different people from different walks of life has really boosted my communication skills.*

*It has helped me to become more confident in meeting and talking to people.*

- **ALL** said that being a part of the MC volunteering team had **improved their overall satisfaction with life:**

*I've loved being a part of MC. It helps me forget about all my university stress which is really nice. I love seeing how much everyone enjoys coming and being able to be a part of the community feels so rewarding.*

- **16** said that they felt a **valued member of the MC family:**

*I feel hugely valued by the ladies who run MC – they give so much to so many people who need help to interact socially, mental health support or companionship – it's just so enjoyable to be a part of!*

- **ALL** said they were **very happy with the communication and support** from the team.

Alongside our volunteer team, and as an alternative to a beneficiary steering group, we have incorporated informal 'MC in Conversation' interludes into our regular sessions. This has provided useful feedback on the project and helped to guide and support musicians over the last year.

## **Partnership Working**

We receive regular referrals from City of York Council's Local Area Co-ordinators, York Medical Group and other NHS social prescribers. We also have good relationships with other related agencies such as Age UK York, OCAAY (Older Citizens Advocacy York), Dementia Forward and York Cares, who are in a position to promote our work to potential beneficiaries and with whom we occasionally run joint events or projects. Similarly, we benefit from a positive relationship with Make It York, a local authority funded agency working to raise the profile of York's local organisations and connect them with the wider community.

More generally, we benefit from York CVS's excellent support for the voluntary sector in the city, and regularly attend their training and information sessions. We are also members of the Music for Healthy Lives Research and Practice Network steering group, an initiative led by the

University of Leeds, and have recently joined the Power of Music Learning Network – an online platform supporting organisations who are using music to improve health and wellbeing.

After 16 years of successfully delivering and developing our project, we are now embedded within the York community, and our project partners clearly value our ability to work with them to provide tailored solutions to overcoming the barriers that prevent older people from being able to stay involved with their local community. The following comment is from the Chief Executive of York Medical Group:

*‘Musical Connections is an incredible organisation that works with our (older) patients, gets them together, helps them to find their singing voice and fills their hearts (and mine) with joy. While the mode is music, the outcome is healing through the magic of music, and it has been amazing to watch how the project has grown. We want to be able to prescribe music, not pills, and we know Musical Connections can help us to do ‘this’.*



## Free Transport

When Musical Connections began working in community settings, it quickly became apparent that transport was a huge barrier for some potential beneficiaries, who could not use public transport or taxis because of disability or a lack of money. Free transport is now firmly embedded in our offer and continues to make a huge difference for people who would not otherwise be able to get to weekly sessions or additional events in the wider community. 57 participants have used this service over the last year, relying either on volunteer drivers or local taxi firms, who are aware of our beneficiaries’ circumstances and needs, and have provided updated safeguarding policies.

We know that our project partners find the offer of free transport hugely helpful in encouraging and enabling their clients to get involved with us, and we believe that our commitment to providing this service on a bespoke and ongoing basis sets us apart from many local services.

## Ongoing Relationships with Intergenerational Partners

Intergenerational work has always played a key role within our project. Our approach is one of mutuality and an expectation that everyone involved will play an equal and active role, so that all participants, regardless of age, have a sense of purpose and a properly shared and meaningful experience. It delivers immediate and direct benefits to participants, both younger and older, as well as wider sustainable benefits relating to cross-generational understanding.

Its success is built on:

- Providing enjoyable opportunities for interaction and communication between younger and older generations, where the music cuts across age and social stereotypes, and can be accessed and enjoyed by everyone, regardless of age.
- A collaborative approach, whereby the Musical Connections musicians work with teaching staff to devise projects and events which have a benefit, not just for our core beneficiaries, but for the children and young people too. Sometimes this means working with teachers to devise musical activities that link into the



curriculum while at other times, it is simply about using music creatively to help everyone relax, get involved and enjoy each other's company. By working in this way, we have found that educational establishments are much more likely to commit to ongoing collaboration than if we base our approaches to them on a vague notion of public-spiritedness and social conscience.

Over the last year, we have worked with the following:

ACOMB PRIMARY SCHOOL	BURTON GREEN SCHOOL	CLIFTON DAY NURSERY
HEWORTH PRIMARY SCHOOL	POPPLTON ROAD SCHOOL	ST AELRED'S PRIMARY SCHOOL
ST BARNABAS PRIMARY SCHOOL	UNIVERSITY OF YORK	UNIVERSITY OF YORK ST JOHN
VALE OF YORK ACADEMY	WESTFIELD PRIMARY SCHOOL	YORK COLLEGE



The interactive content and the regularity of this work helps isolated older people to get involved or re-involved in the life of their community, and to enjoy positive experiences and connections with other people and generations. The evidence suggests that it is an equally positive experience for younger participants.

The following video features an intergenerational workshop including Musical Connections group members

and students from The University of York's Music Education Group:

<https://youtu.be/Fj7zupCx6pA?si=-q9f3n1-brsJyrBd>

## **Solid Financial Management**

Over the past year, we have continued to work towards creating a sustainable and diverse base of support, securing funding from more than 20 grant givers. We are particularly grateful to the Garfield Weston Foundation, the Postcode Neighbourhood Trust, Feoffees of St Michael's Spurriergate and Awards for All, whose larger grants towards core costs were vital in enabling us to continue our work. Grant funding was complemented by voluntary contributions from participants at weekly sessions (we request £4, though no one is excluded if unwilling or unable to contribute), community fundraising, and additional donations from members and supporters. The profile of unrestricted income shifted compared to last year, with a reduction in donations from organisations and an increase in donations from individuals. Contributions from session participants and care homes remained stable and continued to represent a reliable and important source of income. We are now fully funded for 2025/26 and are actively working to attract the resources required for 2026/27.

## FUTURE PLANS

The next 12 months will see us:

- Continuing to increase the number of people accessing our project – we are aiming to work with at least 365 vulnerable older people at weekly sessions, plus another 335 at additional events in the wider community. We will continue to offer free transport, a major obstacle to older and disabled people’s ability to access community activities
- Continuing to nurture existing partner relationships, whilst making new community connections and delivering an increasing number of taster sessions. We are optimistic that this will encourage greater awareness of the project and lead to more people participating in our work
- Working closely with York Medical Group, the City of York Council’s Local Area Co-ordinators and NHS social prescribers to better understand and improve the referrals process. We hope that this will increase conversion rates and ensure new group members remain involved once their referrer stops attending with them
- Continuing to increase the number of schools involved in intergenerational activities, with the intention of delivering up to 60 events and workshops. We anticipate that this will increase social opportunities for both our beneficiaries and local children and young people, and provide a bigger platform for the breaking down of persistent age-related and social barriers and stereotypes
- Continuing to recruit volunteers – although we have some longstanding regulars, volunteer numbers can fluctuate, and to ensure that our team remains strong, we will be maintaining an ongoing recruitment campaign via local agencies, volunteer websites, local/social media and both of York’s universities
- Increasing our multimedia presence to share our work with as wide an audience as possible, so as to continue to heighten our profile, and hopefully, drive higher levels of community fundraising

# FINANCES

## Income and Expenditure

The total receipts up to 31st March were £89,823, and the total payments were £90,209, which leaves a deficit of -£386 for the financial year. When added to the balance carried forward from 2023/24 (£88,737), this left Musical Connections with a total balance of £88,351 for the end of the financial year.

The total amount of receipts allocated to unrestricted funding was £29,253 and there were payments to the value of £30,100, thus leaving a deficit of -£847 at the end of 2024/25. When added to the balance brought forward at the end of 23/24 (£37,311), this leaves the charity with £36,461 of unrestricted funds.

The total amount of receipts allocated to restricted funding was £60,570, and there were payments to the value of £60,109, thus leaving a surplus balance of £461 in restricted grants to carry forward into the next financial year. When added to the balance of restricted funding brought forward at the end of 23/24 (£51,426), this leaves Musical Connections with £51,890 in restricted funds to carry forward into 25/26.

The total receipts received in 24/25 (£89,823) were made up of grants received £60,570 (67%), followed by session fees and contributions of £17,481 (19%). Donations from organisations (£2,513), community fundraising (£4,087) and individual giving (£5,172) together represented the remaining 13% of the total.

*Note: The percentages are rounded to the nearest whole number. The final three income streams have been grouped together and shown as a combined percentage, so the total does not add up to exactly 100%.*

£67,783 or 75% of the payments (£90,209) can be attributed to people costs for 2024/25. The top five categories of payments and the % of the total they account for were as follows:

Musicians' session fees	- £29,534 (33%)
Project management fees	- £28,512 (32%)
Beneficiary transport	- £14,244 (16%)
Community involvement activities	- £4,392 (5%)
Alternative artistic activities	- £3,915 (4%)

For more details on the accounts, please see the Independent Examiners Report for 2024/2025 on pages 34 – 39.

## Fundraising

Our income comes from 4 main sources:

- grants and organisational donations
- voluntary participant donations at sessions
- individual donations and community fundraising
- direct fee income

**Grants and organisational donations:** Grants from over 20 funders have enabled the project to continue seamlessly throughout the year, as well as providing a strong foundation for the year ahead. The largest individual grants were £10k from The Garfield Weston Foundation and Feoffees of St Michael's Spurriergate, £15k from the Postcode Neighbourhood Trust, and £17,560 from Awards for All. Encouragingly, a significant amount of funding has already been raised to support the project into 2025–26, providing a strong foundation for the year ahead.

**Weekly voluntary donations at sessions:** these have come from participants at our community-based groups. We have continued to suggest a £4 donation per session (the amount suggested has remained unchanged since 2021) - some beneficiaries give more, some less and some nothing at all. While these donations are an important source of income for us, nobody is excluded if they are unable or willing to make a contribution.

**Direct fee income:** this has come primarily from the private care-homes which have paid us directly for regular sessions. Dementia Forward has also paid us for a handful of taster sessions at their day clubs

**Community fundraising and individual donations:** Community fundraising activities have included concerts, busking and carol-singing.

We would like to thank the following funders for their support over the last year:

The Arnold Clark Community Fund

Awards for All (The National Lottery Community Fund)

Charles Hayward Foundation

The Dulverton Trust Fund

D'Oyly Carte Charitable Trust

The Feoffees of St Michael's Spurriergate

Garfield Weston Foundation

The Jack Brunton Charitable Trust

The Liz & Terry Bramall Foundation

Postcode Neighbourhood Trust (*a grant-giving charity funded entirely by players of the People's Postcode Lottery*)

The Postlethwaite Music Foundation

The Power of Music Fund

The Purey Cust Trust

The Schroder Charity Trust

The Shears Foundation

The Sir Cliff Richard Charitable Trust

Sir Jules Thorn Charitable Trust

The Victoria Wood Foundation

The W G Edwards Charitable Foundation

The Ward Budget City Wide Fund – City of York Council

The Wharfedale Foundation

The Woodroffe Benton Foundation

York Community Fund

## Reserves Policy

Musical Connections' Reserves Policy, approved by the Trustees in June 2024, states that the charity should hold a maximum of £52.6K in reserves. This level of reserves was set after careful consideration of all the potential reasons reserves would be needed e.g. to aid cash flow, contingency planning to mitigate against unexpected expenditure, to commit designated funds to expenditure not covered by annual income and finally the closure of the charity. After due consideration of all these potential calls on reserves, trustees took the decision that they needed to protect the beneficiaries in the event of having to cease operation, and therefore considered it prudent to hold in reserves six months of its operating costs plus additional funds to cover any professional services, e.g. legal or financial, required to aid the closure. £52.6K represents 50% of the current annual operational costs of running the project with an additional 10% to go towards paying for any professional services that may need to be employed. This level of reserves would protect the charity's beneficiaries, who are mainly socially isolated and vulnerable adults, and enable it to wind down its operation in a sustainable way, rather than abruptly withdraw its services, which would have a detrimental impact on their quality of life. At the end of 2024/25, the level of reserves held was £36.46K.

# Musical Connections

(Charity Number 1165993)

## Independent examiner's report to the Trustees of Musical Connections

I report on the accounts of: For **Musical Connections**  
the year ended: **31st March 2025**

### Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under Section 145 of the 2011 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 material 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 Trust 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.

K Wood

Karen Wood ACMA  
Outsource Independent Examination Service  
2 Galligap Lane  
Osbaldwick  
York  
YO10 3NR

25/7/2025

Date

## Musical Connections

(Charity Number 1165993)

### Receipts & payments accounts for the year ending: 31st March 2025

	Unrestricted funds	Restricted funds	2025 Total	2024 Total
	£	£	£	£
<b>Receipts</b>				
Session fees & contributions	17,481	-	17,481	16,199
Grants	-	60,570	60,570	69,587
Donations from organisations	2,513	-	2,513	6,350
Donations from individuals	5,172	-	5,172	2,014
Community fundraising & events	4,087	-	4,087	3,411
<b>Total receipts</b>	<b>29,253</b>	<b>60,570</b>	<b>89,823</b>	<b>97,561</b>
 <b>Payments</b>				
Session costs - musicians	7,156	22,378	29,534	27,359
Marketing & website	510	1,124	1,634	1,643
Transport costs (beneficiaries)	5,365	8,879	14,244	11,741
Session & event resources	554	590	1,144	979
Insurance	-	445	445	444
Project management costs	11,553	16,959	28,512	25,920
Administration & office costs	784	688	1,472	1,532
Funding bids & fundraising	340	501	841	3,059
Training costs	186	397	583	1,318
Community involvement activities/ volunteer management – musicians	2,433	5,874	8,307	8,100
Venue costs	725	2,130	2,855	3,188
Independent examination	350	-	350	350
Evaluation	144	144	288	444
<b>Total payments</b>	<b>30,100</b>	<b>60,109</b>	<b>90,209</b>	<b>86,077</b>
<b>Net of receipts/(payments)</b>	<b>(847)</b>	<b>461</b>	<b>(386)</b>	<b>11,484</b>
<b>Transfers between funds</b>	<b>(3)</b>	<b>3</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>37,311</b>	<b>51,426</b>	<b>88,737</b>	<b>77,253</b>
<b>Balance carried forward</b>	<b>36,461</b>	<b>51,890</b>	<b>88,351</b>	<b>88,737</b>

## Musical Connections

(Charity Number 1165993)

### Statement of assets and liabilities at:

31st March 2025

	Unrestricted Funds	Restricted Funds	2025 Total Funds	2024 Total Funds
	£	£	£	£
<b>Assets</b>				
Current bank account	36,404	51,890	88,294	88,533
Petty cash	57	-	57	204
	<b>36,461</b>	<b>51,890</b>	<b>88,351</b>	<b>88,737</b>

	Unrestricted Funds	Restricted Funds	2025 Total Funds	2024 Total Funds
	£	£	£	£
<b>Liabilities</b>				
Independent examination fee	350	-	350	350
	<b>350</b>	<b>-</b>	<b>350</b>	<b>350</b>

# Musical Connections

(Charity Number 1165993)

## Notes to the accounts for the year ended:

31st March 2025

### 1. Basis of accounts

The Trustees have taken advantage of Section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

### 2. Restricted income funds

<b>Fund name</b>	<b>Purpose</b>
Charles Hayward Foundation	For the provision of intergenerational work and activities
D'Oyly Carte Charitable Trust	A grant towards core costs
The Liz & Terry Bramall Foundation	A grant towards core costs
Garfield Weston Foundation	3 <sup>rd</sup> instalment of a 3-year grant towards core costs
Awards for All (The National Lottery Community Fund)	A grant towards core costs and the provision of free beneficiary transport
Postcode Neighbourhood Trust	A grant towards core costs
The Victoria Wood Foundation	Musician fees for Gale Farm Court music groups
The Feoffees of St Michael's Spurriergate	1 <sup>st</sup> instalment of a 2-year grant towards core costs
The Dulverton Trust Fund	A grant towards core costs
The Ward Budget City Wide Fund – City of York Council	A grant towards core costs
The Power of Music Fund	1 <sup>st</sup> instalment of a 3-year grant towards core costs
The W G Edwards Charitable Foundation	Musician fees for Honeysuckle Singers
The Woodroffe Benton Foundation	A grant towards core costs
The Shears Foundation	A grant towards core costs
The Sir Cliff Richard Charitable Trust	A grant towards core costs
Sir Jules Thorn Charitable Trust	A grant towards core costs
The Wharfedale Foundation	A grant towards core costs
The Schroder Charity Trust	A grant towards core costs
The Postlethwaite Music Foundation	A grant towards core costs
The Purey Cust Trust	A grant towards core costs
The Arnold Clark Community Fund	For the provision of free beneficiary transport
Awards for All (The National Lottery Community Fund)	A grant towards core costs

## Musical Connections

(Charity Number 1165993)

The Jack Brunton Charitable Trust

A grant towards core costs

York Community Fund

A grant towards project management

	Balance b/fwd £	Income received £	Resources expended £	Transfer of funds £	Balance c/fwd £
<b>Unrestricted</b>	<b>37,311</b>	<b>29,253</b>	<b>30,100</b>	<b>(3)</b>	<b>36,461</b>
Charles Hayward Foundation	3,055	-	3,055	-	-
D'Oyly Carte Charitable Trust	3,000	-	3,000	-	-
The Liz & Terry Bramall Foundation	1,468	-	1,468	-	-
Garfield Weston Foundation	10,000	-	10,003	3	-
Awards for All (NL Community Fund)	1,663	-	1,663	-	-
Postcode Neighbourhood Trust	15,000	-	15,000	-	-
The Victoria Wood Foundation	2,240	-	2,240	-	-
Feoffees of St Michael's Spurriergate	10,000	-	6,346	-	3,654
The Dulverton Trust Fund	5,000	-	5,000	-	-
Ward Budget City Wide Fund – COYC	-	6,600	6,600	-	-
The Power of Music Fund	-	2,000	2,000	-	-
W G Edwards Charitable Foundation	-	2,160	2,160	-	-
The Woodroffe Benton Foundation	-	500	-	-	500
The Shears Foundation	-	5,750	-	-	5,750
The Sir Cliff Richard Charitable Trust	-	3,000	1,574	-	1,426
Sir Jules Thorn Charitable Trust	-	3,000	-	-	3,000
The Wharfedale Foundation	-	5,000	-	-	5,000
The Schroder Charity Trust	-	3,000	-	-	3,000
The Postlethwaite Music Foundation	-	1,000	-	-	1,000
The Purey Cust Trust	-	4,000	-	-	4,000
The Arnold Clark Community Fund	-	500	-	-	500
Awards for All (NL Community Fund)	-	17,560	-	-	17,560
The Jack Brunton Charitable Trust	-	1,500	-	-	1,500
York Community Fund	-	5,000	-	-	5,000
<b>Total restricted</b>	<b>51,426</b>	<b>60,570</b>	<b>60,109</b>	<b>3</b>	<b>51,890</b>
<b>Total Funds</b>	<b>88,737</b>	<b>89,823</b>	<b>90,209</b>	<b>-</b>	<b>88,351</b>

### Transfer between funds

Funds have been transferred from unrestricted funds to various overspent restricted funds.

## Musical Connections

(Charity Number 1165993)

**Approval of accounts for the year ended:**

**31st March 2025**

The report and accounts were approved at a meeting of the Trustees held on:

16<sup>th</sup> JULY 2025

J Faust

17<sup>th</sup> JULY 2025

**Signed for and on behalf of the trustees**

**Date**

J FARRINGTON

TREASURER

**Print name**

**Position (e.g. Chair etc)**

**MUSICAL CONNECTIONS**

England & Wales - Charity number 1165993

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# Accounts

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*Happier, healthier lives through music*

## **Musical Connections Annual Report and Financial Statement**

31<sup>st</sup> March 2024



Reg. Charity No: 1165993



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**ARTS COUNCIL  
ENGLAND**

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E: [enquiries@musicalconnections.org.uk](mailto:enquiries@musicalconnections.org.uk)

W: [www.musicalconnections.org.uk](http://www.musicalconnections.org.uk)

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# ORGANISATIONAL DETAILS

**Type of Charity:** Musical Connections is a CIO (a Charitable Incorporated Organisation).

**Charity Registration Number:** 1165993

**Date of Registration:** 10th March 2016

**Postal Address:** PO Box 724, York, YO1 0HL

**Trustees:**

- Valerie Sutton (Chair)
- Jo Farrington (Treasurer)
- Chris Bartram
- Hazel Brown
- Richard Frost
- Fiona Chapman

**Bank:**

- NatWest
- City Centre Branch
- 1 Market Street
- York, YO1 8SR

**Accountants:**

- Outsource
- 29 Millfield Road
- York, YO23 1NH

Over the last year, our team has consisted of two Project Managers, who are also musicians, and 2 more self-employed musicians, supported by an active Board of Trustees, which has remained unchanged.

# GOVERNANCE

## **Election of Charity Trustees**

Clause 10.1 of our constitution states that ‘apart from the first charity trustees, every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees’. Clause 10.2 states: ‘In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO’.

## **Additional Governance Information and Organisational Structure**

Musical Connections’ board of trustees is both experienced and active, bringing together a range of skills and expertise. Our Chair was previously Group Manager of Adult Services for City of York Council, and, since 2016, has used her extensive experience in managing and delivering care for York’s older people to inform our work. She has been ably supported by the rest of the trustee board, which includes a retired GP, a former marketing manager, a former senior music lecturer from York St John University, a retired chartered engineer, who is also one of our choir members, and Musical Connections’ former Project Director, who led the project for 13 years and continues to write grant applications in support of the charity. Together the board is well equipped to provide oversight and guidance for the project.

Our Project Managers have been dedicated members of the Musical Connections (MC) team for several years and are much-loved by MC beneficiaries in both care and community settings. They took over from the outgoing Project Director (who continues to mentor them in her role as a trustee) in July 2022, and have led the project with skill and indefatigable enthusiasm ever since. Highly skilled musicians themselves, they provide strong leadership and support to the team’s other musicians, who are also adept in working with vulnerable older people who have a range of needs, interests, and abilities.

Over the year, we have run 10 music sessions in a range of care and community settings (9 weekly and 1 fortnightly), plus numerous intergenerational events and activities. We have also built in some digital activity, informed by our learning and experiences during the pandemic, and continued to build on the strong sense of ‘family’ that we developed with group and choir members during that difficult time.

## **Risk Management**

The Board of Trustees considers that they have complied with their duties to have due regard to the public benefit guidance published by the Charity Commission, and work collectively to review risks, systems, and procedures on a regular basis. One of our trustees has had particular responsibility for Health and Safety, one of the Project Managers is the Designated Safeguarding Lead, and our Chair has been the Deputy Safeguarding Lead.

# BACKGROUND AND OBJECTIVES

## Background

2023-24 has been the first year that has felt 'normal' since the advent of Covid-19. While new protocols have prevented us from resuming groups in GP surgeries (we now run these groups in nearby community venues), we no longer observe social distancing or use CO2 monitors in sessions. With the full support of our beneficiaries, we have also gradually increased the number of larger community-based and intergenerational events. Nonetheless, we have maintained ongoing vigilance about any possible re-emergence of the virus and have urged both beneficiaries and musicians not to attend sessions while suffering symptoms.

## Objectives

The smooth transition in project management has ensured that we have continued to deliver on our charity's objectives i.e.:

- To advance the wellbeing of vulnerable and socially isolated older people
- To relieve isolation and social exclusion amongst vulnerable people
- To provide opportunities to vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

# ACTIVITIES DELIVERED AND BENEFICIARY NUMBERS

Over the course of the year, the following activities were delivered by our team of dedicated musicians:

- **330** music sessions with **298** beneficiaries in care and community settings across York i.e.:
  - o 4 City of York Council's sheltered housing schemes (3 weekly and 1 fortnightly) - advertised to and well-attended by members of the local community, as well as people living in the schemes. Due to difficulties out of our control in one of these schemes (related to a Police Protection Order), we had to terminate one of these groups in July 2023
  - o 2 private care-homes (1 of which replaced the closed sheltered housing group)
  - o 3 in partnership with York Medical Group (as we had to move out of their surgeries, York Medical Group has covered the cost of alternative venues nearby)
  - o 2 community choirs
- **6-session** summer project involving members from several of the above groups, culminating in a city-centre busking event
- **26** intergenerational workshops, concerts, and projects, involving **659** children and young people
- **2** collaborative video recordings involving contributions from group members and intergenerational partners, e.g.:
  - o Thank You For Being a Friend for Music for Dementia:  
[https://youtu.be/7b\\_v9EUosgM?si=i\\_2Oua5Qkl7BaEug](https://youtu.be/7b_v9EUosgM?si=i_2Oua5Qkl7BaEug)
  - o A Christmas recording of Jingle Bell Rock:  
<https://youtu.be/ou2zMa5tBLc?si=62wYTJcxZwBSbkNv>

- **20** additional community-based events involving a further **188** vulnerable and older adults, such as informal concerts at Age UK day clubs, carol-singing, and formal concerts with other choirs in traditional concert venues e.g., the Joseph Rowntree Theatre, and Merchant Adventurers Hall

Free transport was provided for anyone who needed it, to enable them to attend both weekly sessions, and additional community-based events.

Alongside the groups, our musicians and volunteers have stayed in touch with group and choir members between sessions, ensuring everybody has had the information and support they have needed to be able to attend sessions, and to identify where extra help may be required.

*What the team do at Musical Connections is amazing. Music is universal and to be able to bring people together through this medium and create true happiness and positivity are just some of the many reasons I feel so privileged to be an ambassador. I've been lucky enough to witness first-hand the joy that the sessions bring to the lives of those involved, and the more people that can hear about and get on board with the charity, the better.*

(Laura Castle, local radio presenter and Musical Connections ambassador, pictured centre below)



# 2023/24 AT A GLANCE

Over the course of the year, 298 beneficiaries have taken part in weekly music and singing sessions, plus c.188 additional vulnerable older people who took part in 20 additional, one-off events in the wider community. In addition, 659 children and young people from a local nursery, schools and universities took part in 26 intergenerational activities with beneficiaries. 88 people, who would otherwise have been unable to get involved in community-based creative activities, made use of our offer of free transport.



## SOME HIGHLIGHTS OF THE YEAR

Of this year's many highlights, we were particularly proud of our intergenerational celebration of the King's Coronation. This event provided group members with the unique opportunity to make music with the younger generation and enjoy informal performances in a relaxed and supportive setting. Similarly, a Sing for the King rehearsal prior to the event helped the children to feel as comfortable as possible whilst heightening their eagerness to engage. For some beneficiaries, particularly those who had only recently returned to larger, in-person events following the lockdowns, it also provided the much-needed chance to interact and connect with the wider community, allowing them to meet new friends and experience a sense of purpose and positivity through the power of music.

*Just a brief note to say a huge thank you for all you arranged at St Joseph's Church yesterday. Mary and I thoroughly enjoyed being with you, the children and all the singers. It was quite wonderful. Thank you again.*



Most unexpectedly, this was followed, some months later, by an invitation from Buckingham Palace, to attend a reception at Windsor Castle for organisations working to promote and deliver community music in the UK. Due to the King's ill health, the event has understandably been postponed, however, our project managers, Abigail Noble Coates, and Charlotte Yandell alongside Fiona Chapman, project founder and trustee, look forward to receiving this acknowledgment of the impact and importance of our work.

Another big moment was our 'Summer Spectacular', a multi-media concert celebrating the end of a 20-month grant from Arts Council England. Attended by members from many of our groups, plus friends, family and project supporters, the evening was filled with Musical Connections performances, a virtual contribution from St Aelred's School Choir, plenty of free-flowing Prosecco and a delicious cake baked by a group member. Altogether, it felt like a true summary of not just how special our Musical Connections family are, but also how far we've come during the last couple of years.



# IMPACT ON PARTICIPANT WELLBEING

Feedback from beneficiaries suggests that the work we have done over the last year has had a significant positive impact on their wellbeing.

During two tracking phases (October 2023 and March 2024), 118 beneficiaries completed feedback questionnaires.

- **100%** said coming to Musical Connections **improved their mood** on the day (**92%** said **greatly**):



*I find it very uplifting. It reminds me that I'm still alive.*

*Being with the Rolling Tones invariably improves my mood - it is such a friendly, upbeat, and enthusiastic group.*

*The cheerfulness is infectious.*

*It really lifts my mood, especially when the weather is dull.*

- **100%** said that weekly sessions make them **feel generally happier and more positive about life** (**82%** said that they **greatly** improve their happiness):

*It's uplifting to be singing with others and leaving outside issues at the door.*

*One can forget about life's problems for a while.*

*Being a member of the Rolling Tones is an entirely positive experience for me - stimulating, fun and very satisfying - the feel-good factor lasts throughout the week, and even practising at home makes me feel happier and more positive.*



- **96%** said that participating in their MC group **improves their confidence/self-esteem** (**70%** said **greatly**):



*I was always told I couldn't sing and now, in my 70s, I feel very welcome.*

*I think it's such an achievement when we sing something we are learning, and it comes together.*

*I get a great sense of achievement getting it right.*

*I love having the opportunity to perform on a real stage.*

- **99%** said that their MC sessions help them to **feel more alert and active**:

*I'm up early and ready to take part.*

*I always feel lifted, enlivened, and energised after a session.*



- **100%** said that participating in the sessions **gives them a sense of purpose and something to look forward to**:

*Tuesday mornings are such fun and there is always a buzz of anticipation in the hall. I really look forward to it each week.*

*I look forward to choir every week and find the sessions very enjoyable.*

*I always look forward to seeing people, talking to people, laughing with people.*



- **97%** said that participating in MC events and sessions gives them an opportunity to make **increased contact with other people/the wider community**. For many, it is the only regular social and creative activity available to them:

*Living on my own, it gives me the opportunity to feel included.*

*There are opportunities to chat to different people every week, and to new members.*

*Being part of MC and attending sessions at the community centre (where I used to work) gives me the opportunity to pass time with old colleagues.*



- **95%** said that they have **made new friends** since joining the group:

*The group has become close knit and caring.*

*I enjoy being sociable with like-minded people who have now become good friends.*

*I love singing and socialising with other people.*



- **97%** said that going to their MC group **improves their overall life satisfaction** and **63%** said it improves **greatly**. Weekly sessions and additional events in the wider community appear to give people who are struggling with loneliness something positive to think about and to draw upon during difficult times.



*I find music and singing with others very uplifting. It reminds me that I'm still alive.*

*I'm always so very glad to have been with people who can take me as I am. It helps me feel I can cope with the rest of the day.*



- **100%** said that MC sessions **improve their overall wellbeing.**

*It is rewarding to sing as part of a group and to develop skills such as singing harmonies.*

*It is an honour to meet and converse with such lovely people.*

- **92%** believe that participating in sessions **improves their physical health.** The focus and concentration needed to engage fully in session activities helps reduce rumination, anxiety, and stress, giving people a sense of clarity and helping them to feel calmer and more centered:

*The warm-ups with movement are good fun - the more movement the better for all our practice pieces.*

*Being able to move (a little) in time to the music we sing relieves me of tension.*

*The deep breathing involved in singing is good for the heart and lungs.*



- The work that we did throughout the coronavirus lockdowns had the effect of making our musical community stronger and closer than it was before. This sense of connection has been sustained, with many members continuing to refer affectionately to 'Our Musical Family'. **98%** said that they continue to **feel a valued member of the MC family** and **75%** said **greatly.**

*I regard Abby and other group members as another branch of my family.*

*The MC team go to great lengths to be inclusive and friendly with everyone, routinely thanking members for their input, so that everyone can feel 'seen' and valued.*

*Charlotte has the skill of addressing every member by name and responding to individual concerns or questions immediately and with great patience.*

*It's great to feel accepted and not judged.*



## Social Prescribing

Musical Connections has worked with York Medical Group (YMG) as a social prescribing partner since 2018. No longer able to base ourselves in their surgeries because of post-Covid protocols, we have found alternative venues for these groups in the wider community - YMG is covering the rental costs for us, and despite the loss of contact with patients in the surgeries, our strong relationships with YMG and their link-workers continue to ensure a steady stream of referrals.

Over the last 6 years, social prescribing has become a city-wide initiative, with widespread acceptance of its ability to provide patients with legitimate non- medical solutions to their problems. In addition to our close relationship with YMG, we are now well-connected to and receive regular referrals from NHS link-workers representing other primary care networks.

## DIGITAL ACTIVITIES

Following a digital inclusion project completed last year, we have come to the realisation that some of our most vulnerable beneficiaries need much more intensive support than our small team can provide. Nonetheless, we have continued to support those group members who are keen to engage with technology, and have also tried to involve other, more able members of the project – offering them tablets to access song lyrics during their weekly sessions. This has proved beneficial, and 33 members of two of our York Medical Group choirs are now using them in favour of paper. We have also continued to explore ways in which we can make the digital world slightly more accessible, including regular collaborative video recordings.



# MUSICAL CONNECTIONS' MAGIC INGREDIENTS

Over the 15 years that Musical Connections has been running, including throughout the coronavirus pandemic, we have seen how these ingredients have combined to create a formula which has enabled us to consistently deliver a creative, high-quality, and adaptable project which has become greatly valued in York, both by its beneficiaries and by the wider community, including healthcare professionals.



## IN MORE DEPTH:

### Clear Values and Carefully Considered Working Practices

The following characteristics are cornerstones of our work:

**Continuity:** During Covid-19, our determination to maintain the beneficiary friendships and community connections developed prior to the emergence of the virus and to provide a continuous programme of musical and social activities through all levels of restrictions meant that, as we emerged from the pandemic, many of these friendships and connections were even stronger than before. Our ongoing commitment to providing a continuous programme of sessions, events, and related activities (structured loosely around the academic timetable) has ensured that these relationships continue to flourish.

**Inclusivity:** We welcome any older person who wishes to join us, regardless of ability or disability. We do not believe in compartmentalising people and have been told, particularly by people living with dementia, that they prefer not to be pigeon-holed as such, but would rather mix with other members of the community as they would have done before their diagnosis.

We have become known amongst social prescribers and other sign-posters for our flexibility and willingness to provide the support needed to enable people to get involved and to circumvent any obstacles which prevent potential beneficiaries from joining us.

**Avoidance of stereotyping:** We do not make assumptions about participant preferences and invite them to engage with all kinds of musical genres and activities. In concerts and city-centre busking this year, members pulled off fantastic performances of songs by artists such as Walk the Moon and Fleetwood Mac.

**Providing opportunities to learn and achieve:** Beneficiaries, including those with learning disabilities or dementia, have repeatedly demonstrated that they enjoy and are stimulated by being offered a degree of challenge e.g., learning and composing new songs. Simply re-visiting old favourites can get boring after a while.

**Building on participant skills and interests:** Where participants have shown a particular talent, we have worked hard to celebrate it. Group/choir members who wish to are invited to perform solo or with small ensembles, and one member has used her considerable artistic skills to deliver art workshops for members of other groups.

**Good relationships between the project musicians and carers/staff in care settings:** Our team works hard at developing positive relationships with others who have responsibility for the welfare of our beneficiaries. We aim to develop an understanding of each other's issues, and to develop mutual respect, which ensures that the project is delivered collaboratively, with a shared focus on how to maximise benefits for participants:

*Chris and John love coming to the choir – they both like being with people and they have friends here. They really look forward to coming, especially to the events with children.*

**Ensuring participants are fully involved in evaluation and planning activities:** While most participants tell us that they would rather be making music than discussing the process/project, they appreciate being asked for their opinions about their group, and for guidance on its future development. In an extension of this work, we have run steering group sessions with beneficiaries, which has helped to provide extra insight and support for the team over the last year.

**Disciplined and focused tracking and evaluation activities:** Involving beneficiaries and volunteers in the following activities has given us great insight into the impact of our work, enabling us to move forwards with confidence and an understanding of what beneficiaries need and value:

- A mix of data-collection approaches i.e.: individual interviews, group sessions and video-making has maximised the extent and type of information gathered. Please follow the link to watch a Q&A video with Betty, a member of one of our YMG-linked groups: <https://www.youtube.com/watch?v=ovcGFgZezno>
- Where participants have struggled to understand the process, adapting questioning styles to meet the needs of each individual has facilitated their involvement
- To gauge the accuracy of the information gathered by the musicians in their self-evaluation activities, trustees have visited individual groups to observe sessions and talk to participants

Continuous review of the process has optimised participation in it and the usefulness of the information collected. While adjusting to in-person work, it has been very helpful to be able to gauge how beneficiaries have adapted to our 'post-Covid' project, and to understand how re-connecting with their musical family has benefited them.

## **Support Offered to Beneficiaries Between Sessions**

The intensive support we provided to our beneficiaries during the pandemic has left a lasting legacy and, since returning to in-person sessions, our musicians and volunteers have continued to work incredibly hard to maintain contact with beneficiaries between sessions, helping them to sustain the connections formed within the groups, and identifying the support needed for them

to access as many as possible of the numerous musical activities on offer. As a consequence of this additional work, we can say with confidence that we do not just offer participants a weekly creative outlet, but a much more profound social and creative framework which, over time, becomes the bedrock of many beneficiaries' lives, giving them friendship, a sense of belonging and numerous experiences to look forward to and to enjoy together.

## **Creative, Skilled and Dedicated Musicians**

Our musicians work hard to achieve a balance between accessibility and providing a level of challenge which requires focus and application from group participants. An emphasis on developing musical understanding and offering more complex experiences than traditional singalongs is appreciated by beneficiaries who are keen to use their brains and skills and to embrace an opportunity to learn and experience something new without feeling any pressure.

The musicians provide a welcoming and supportive environment for these activities to take place and fully understand that, while the music gives group members focus and purpose, the groups need to be delivered in a way that maximises relationships with and between everyone involved – the musicians all know that, ultimately, the purpose of the music is to facilitate these relationships and is not an end in itself. This knowledge and understanding are what helps them to deliver our project so effectively – and is also what drives them to stay in contact with some of our most vulnerable members between sessions – they appreciate that ‘our musical family’ extends beyond the boundaries of session times.

The musicians also have considerable digital abilities, which have enabled them to support beneficiaries who have wished to develop their own digital skills.

## **A Sizeable Volunteer Team**

Over the year, 25 volunteers have supported the project, with 12 of these as regulars, and 13 students who have worked with us on an ad-hoc basis:



Our beneficiaries benefit hugely from the volunteers' contributions:

*Members of the group are so appreciative, which supports your confidence that you are doing something worthwhile.*

It is apparent that the volunteers enjoy their work with us and benefit just as much as our primary beneficiaries from the social connection and musical participation that the groups offer them. They are also inspired by the opportunities the project presents for them to use their skills and time in support of others.

*I have taken away so much from volunteering with MC – each session was a worthwhile reminder of the importance and influence of friendship, compassion and laughter. Likewise, it was heartwarming to see fabulous people from all walks of life find a common interest in music.*



In questionnaires conducted with **7** volunteers, **ALL** said that volunteering for MC **improved their mood** that day):

*I left every session with a smile and always took something positive away. It's hard not to when the atmosphere is so full of joy!*

- **ALL** said that it made them feel **generally happier and more positive**:

*My mental health benefits enormously from being an active volunteer, having social contact with and contributing to such an upbeat group.*

*It's easier to have a more positive outlook on life after sessions.*

- **ALL** said volunteering had helped to **improve their confidence**:

*My confidence and self-esteem grew with each session, as I was made to feel completely welcome and part of the team.*

- **ALL** said that being a part of the MC volunteering team had **improved their overall satisfaction with life:**

*Volunteering gives vital structure, sociability and focus to life post-retirement, especially when it involves an activity that you love. For me, volunteering with Musical Connections fulfils all these elements. Also, it constantly informs my understanding of other people's lives and challenges.*

- **ALL** said that they felt a **valued member of the MC family:**

*I've always felt valued by the team at Musical Connections. Charlotte never fails to express her appreciation to volunteers.*

- **ALL** said they were **very happy with the communication and support** from the team.

Alongside our volunteer team, we have had an active beneficiary steering group, which has provided useful feedback on the project, and helped to guide and support the musicians over the last year.

## **Partnership Working**

We receive regular referrals from City of York Council's Local Area Co-ordinators, York Medical Group and other NHS social prescribers. We also have good relationships with other related agencies such as Age UK York, OCAY (Older Citizens Advocacy York), Dementia Forward and York Cares, who are in a position to promote our work to potential beneficiaries and with whom we occasionally run joint events or projects. Similarly, we benefit from a positive relationship with Make It York, a local authority funded agency working to raise the profile of York's local organisations and connect them with the wider community.

More generally, we benefit from York CVS's excellent support for the voluntary sector in the city, and regularly attend their training and information sessions. We are also members of the Music for Healthy Lives Research and Practice Network steering group, an initiative led by the University of Leeds.

After 15 years of successfully delivering and developing our project, we are really starting to become embedded within the York community, and our project partners clearly value our ability to work with them to provide tailored solutions to overcoming the barriers that prevent older

people from being able to stay involved with their local community. The following comment is from the Chief Executive of York Medical Group:

*'Musical Connections is an incredible organisation that works with our (older) patients, gets them together, helps them to find their singing voice and fills their hearts (and mine) with joy. While the mode is music, the outcome is healing through the magic of music, and it has been amazing to watch how the project has grown. We want to be able to prescribe music, not pills, and we know Musical Connections can help us to do 'this'.*



## Free Transport

When Musical Connections began working in community settings, it quickly became apparent that transport was a huge barrier for some potential beneficiaries, who could not use public transport or taxis because of disability or a lack of money. Free transport is now firmly embedded in our offer and continues to make a huge difference for people who would not otherwise be able to get to weekly sessions or additional events in the wider community. 88 participants have used this service over the last year, relying either on volunteer drivers or local taxi firms, who are aware of our beneficiaries' circumstances and needs, and have provided updated safeguarding policies.

We know that our project partners find the offer of free transport hugely helpful in encouraging and enabling their clients to get involved with us, and we believe that our commitment to providing this service on a bespoke and ongoing basis sets us apart from many local services.

## Ongoing Relationships with Intergenerational Partners

Intergenerational work has always played a key role within our project. Our approach is one of mutuality and an expectation that everyone involved will play an equal and active role, so that all participants, regardless of age, have a sense of purpose and a properly shared and meaningful experience. It delivers immediate and direct benefits to participants, both younger and older, as well as wider sustainable benefits relating to cross-generational understanding.

Its success is built on:

- Providing enjoyable opportunities for interaction and communication between younger and older generations, where the music cuts across age and social stereotypes, and can be accessed and enjoyed by everyone, regardless of age.
- A collaborative approach, whereby the Musical Connections musicians work with teaching staff to devise projects and events which have a benefit, not just for our core beneficiaries, but for the children and young people too. Sometimes this means working with teachers to devise musical activities that link into the curriculum while at other times, it is simply about using music creatively to help everyone relax, get involved and enjoy each other's company. By working in this way, we have found that educational establishments are much more likely to commit to ongoing collaboration than if we base our approaches to them on a vague notion of public-spiritedness and social conscience.

Over the last year, we have worked with the following:

ACOMB PRIMARY SCHOOL	BURTON GREEN SCHOOL	CLIFTON DAY NURSERY
CLIFTON GREEN SCHOOL	CLIFTON PREP SCHOOL	ST AELRED'S PRIMARY SCHOOL
ST GEORGE'S PRIMARY SCHOOL	WESTFIELD PRIMARY SCHOOL	UNIVERSITIES OF YORK AND YORK ST JOHN AND YORK COLLEGE



The interactive content and the regularity of this work helps isolated older people to get involved or re-involved in the life of their community, and to enjoy positive experiences and connections with other people and generations. The evidence suggests that it is an equally positive experience for younger participants.

The following video spotlights our intergenerational work and includes feedback from both older and younger participants:

<https://www.youtube.com/watch?v=AHdxw5in5ts>

## **Solid Financial Management**

Since emerging from the Covid-19 crisis, we have been focusing on longer-term sustainability. A large grant from Arts Council England, which carried us through the re-instatement of in-person activities, came to an end in July 2023, but the project was able to continue without interruption thanks to several additional grants secured prior to this date. Our unrestricted reserves remain just below the 6-month mark, and a substantial amount of grant funding is in place for the coming year.

Grant funding has been complemented by income from voluntary participant contributions at weekly sessions (we request £4, but do not exclude anyone who is unwilling or unable to contribute), community fundraising and additional donations from members and project supporters.

# FUTURE PLANS

The next 12 months will see us:

- Continuing to increase the number of people accessing our project - we know that there are many more older people in York living with ill health, disability and loneliness who could benefit from our work. We will continue to offer free transport, a major obstacle to older and disabled people's ability to access community activities, and we will be working closely with social prescribers to better understand and improve the referrals process so that we can increase the number of beneficiaries participating regularly
- Continuing to increase the number of schools involved in our intergenerational programme, with the intention of delivering up to 50 outreach sessions and events. This will offer increased social opportunities for both our beneficiaries and local children and young people, and provide a bigger platform for the breaking down of persistent age-related and social barriers and stereotypes
- Continuing to recruit volunteers – although we have some longstanding regulars, volunteer numbers can fluctuate, and to ensure that our team remains strong, we will be maintaining an ongoing recruitment campaign via local agencies, volunteer websites, local/social media and both of York's universities
- Increasing our multimedia presence, including launching a joint project with The University of York in which students will be responsible for developing and maintaining a Musical Connections TikTok profile
- Continuing to embed digital activities alongside the core group work by supporting members who want to use technology to access musical and other resources, and creating collaborative video recordings using contributions from Musical Connections beneficiaries, volunteers, school children, students, and other members of the York community
- Building on the strong sense of family that has developed over recent years to encourage beneficiaries to take more ownership of the project, where possible i.e.:

- Holding beneficiary steering group sessions to garner feedback and ideas which can be used to inform planning and project development
- Asking group members to be part of the recruitment process for new staff
- Including more beneficiaries in conversations with funders

# FINANCES

## Income and Expenditure

The total receipts up to 31st March were £97,561, and the total payments were £86,077, which leaves a surplus of £11,484 for the financial year. When added to the carried forward balance from 2022/23 (£77,253), this left Musical Connections with a total balance of £88,737 for the end of the financial year.

The total amount of receipts allocated to unrestricted funding was £27,974, and there were payments to the value of £30,096, thus leaving a deficit of -£2,122 at the end of 2023/24. When added to the balance brought forward at the end of 22/23 (£39,433), this leaves the charity with £37,311 of unrestricted funds.

The total amount of receipts allocated to restricted funding was £69,587, and there were payments to the value of £55,981, thus leaving a surplus balance of £13,606 in restricted grants to carry forward into the next financial year. When added to the balance of restricted funding brought forward at the end of 22/23 (£37,820), this leaves Musical Connections with £51,426 in restricted funds to carry forward into 24/25.

The total receipts received in 23/24 (£97,561) were made up of grants received £69,587 (71%), followed by session fees and contributions of £16,199 (17%). Donations from organisations (£6,350), community fundraising (£3,411) and individual giving (£2,014) together represented the remaining 12% of the total.

The top five categories of payments and the 90% of the total (£86,077) they accounted for, were as follows:

Musicians' session fees	- £27,359 (32%)
Project management fees	- £25,920 (30%)
Beneficiary transport	- £11,741 (14%)
Community involvement and alternative artistic activities	- £8,100 (9%)
Venue hire costs	- £3,188 (4%)

For more details on the accounts, please see the Independent Examiners Report for 2023/2024 on pages 34 – 39.

## Fundraising

Our income comes from 4 main sources:

- grants and organisational donations
- voluntary participant donations at sessions
- individual donations and community fundraising
- direct fee income

**Grants and organisational donations:** a large grant from Arts Council England, which took us through all of 2022-23 up until July 2023, was followed by other significant grants which ensured the project was able to continue seamlessly through the rest of 2023-24 e.g. £10,000 from both the Garfield Weston Foundation and the Shears Foundation. A significant amount of further grant funding has been raised for 2024-25.

**Weekly voluntary donations at sessions:** these have come from participants at our community-based groups. We have continued to suggest a £4 donation per session (the amount suggested has remained unchanged since 2021) - some beneficiaries give more, some less and some nothing at all. While these donations are an important source of income for us, nobody is excluded if they are unable or willing to make a contribution.

**Direct fee income:** this has come primarily from the private care-homes which have paid us directly for regular sessions. Age UK has also paid us for a handful of taster sessions at their day clubs

**Community fundraising and individual donations:** Community fundraising activities have included concerts, busking and carol-singing.

We would like to thank the following funders for their support over the last year:

Arts Council England

Awards for All (National Lottery)

Barchester's Charitable Foundation

Benenden Health Community Fund

Brelms Trust CIO

Charles Hayward Foundation

The Dulverton Trust Fund

D'Oyly Carte Charitable Trust

The Feoffees of St Michael's Spurriergate

Garfield Weston Foundation

The Headley Trust

The Liz & Terry Bramall Foundation

Postcode Neighbourhood Trust *(a grant-giving charity funded entirely by players of the People's Postcode Lottery)*

The Shears Foundation

The Utley Foundation

The Victoria Wood Foundation

The Whitwam Family Charitable Foundation

## Reserves Policy

Musical Connections' Reserves Policy, approved by the Trustees in May 2023, states that the charity should hold a maximum of £44.44K in reserves. This level of reserves was set after careful consideration of all the potential reasons reserves would be needed e.g. to aid cash flow, contingency planning to mitigate against unexpected expenditure, to commit designated funds to expenditure not covered by annual income and finally the closure of the charity. After due consideration of all these potential calls on reserves, trustees took the decision that they needed to protect the beneficiaries in the event of having to cease operation, and therefore considered it prudent to hold in reserves six months of its operating costs plus additional funds to cover any professional services, e.g. legal or financial, required to aid the closure. £44.4K represents 50% of the current annual operational costs of running the project with an additional 10% to go towards paying for any professional services that may need to be employed. This level of reserves would protect the charity's beneficiaries, who are mainly socially isolated and vulnerable adults, and enable it to wind down its operation in a sustainable way, rather than abruptly withdraw its services, which would have a detrimental impact on their quality of life. At the end of 2023/24, the level of reserves held was £37.32K.

## **Musical Connections**

(Charity Number 1165993)

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### **Independent examiner's report to the Trustees of Musical Connections**

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I report on the accounts of: **Musical Connections**

For the year ended: **31st March 2024**

#### **Responsibilities and basis of report**

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As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under Section 145 of the 2011 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**

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I have completed my examination. I confirm that no material 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 Trust 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.

*K Wood*

Karen Wood ACMA, CGMA  
Outsource independent examination service  
The Hiscox Building  
Peasholme Green  
York YO1 7PR

*14/11/2024*

Date

## Musical Connections

(Charity Number 1165993)

### Receipts & payments accounts for the year ending: 31st March 2024

	Unrestricted funds	Restricted funds	2024 Total	2023 Total
	£	£	£	£
<b>Receipts</b>				
Session fees & contributions	16,199	-	16,199	14,177
Grants	-	69,587	69,587	51,839
Donations from organisations	6,350	-	6,350	2,000
Donations from individuals	2,014	-	2,014	8,485
Community fundraising and events	3,411	-	3,411	4,348
<b>Total receipts</b>	<b>27,974</b>	<b>69,587</b>	<b>97,561</b>	<b>80,849</b>
<b>Payments</b>	£	£	£	£
Session costs - musicians	9,992	17,367	27,359	30,695
Marketing & website	393	1,250	1,643	1,111
Meeting costs	-	-	-	450
Beneficiary transport costs	266	11,475	11,741	8,956
Session and events resources	359	620	979	1,666
Insurance	-	444	444	518
Project management costs	11,587	14,333	25,920	24,836
Administration & office costs	472	1,060	1,532	893
Funding bids & fundraising	2,894	165	3,059	820
Training costs	275	1,043	1,318	1,545
Community involvement and alternative artistic activities	2,670	5,430	8,100	7,398
Venue costs	894	2,294	3,188	4,301
Volunteer costs & DBS checks	-	-	-	12
Independent examination	-	350	350	300
Evaluation	294	150	444	300
<b>Total payments</b>	<b>30,096</b>	<b>55,981</b>	<b>86,077</b>	<b>83,801</b>
<b>Net of payments/receipts</b>	<b>(2,122)</b>	<b>13,606</b>	<b>11,484</b>	<b>(2,952)</b>
<b>Transfers between funds</b>	-	-	-	-
<b>Balance brought forward</b>	<b>39,433</b>	<b>37,820</b>	<b>77,253</b>	<b>80,205</b>
<b>Balance carried forward</b>	<b>37,311</b>	<b>51,426</b>	<b>88,737</b>	<b>77,253</b>

## Musical Connections

(Charity Number 1165993)

### Statement of assets and liabilities at:

31st March 2024

	Unrestricted funds	Restricted funds	2024 total funds	2023 total funds
<b>Assets</b>				
Current bank account	37,107	51,426	88,533	77,144
Petty cash	204	-	204	109
	<b>37,311</b>	<b>51,426</b>	<b>88,737</b>	<b>77,253</b>

	Unrestricted funds	Restricted funds	2024 total funds	2023 total funds
<b>Liabilities</b>				
Independent examination fee	350	-	350	300
	<b>350</b>	<b>-</b>	<b>350</b>	<b>300</b>

# Musical Connections

(Charity Number 1165993)

## Notes to the accounts for the year ended:

31st March 2024

### 1. Basis of accounts

The Trustees have taken advantage of Section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

### 2. Restricted income funds

Fund name	Purpose
Brelms Trust CIO	3rd instalment of a 3-year grant to deliver music groups and intergenerational activities
Charles Hayward Foundation	For the provision of intergenerational work and activities
D'Oyly Carte Charitable Trust	A grant towards core costs
The Liz & Terry Bramall Foundation	A grant towards core costs
Garfield Weston Foundation	3rd instalment of a 3-year grant towards core costs
Awards for All (National Lottery)	A grant towards core costs and the provision of free beneficiary transport
Arts Council England	Second instalment of a grant to support: weekly in-person music groups; the inclusion of digital/online activities; significant organisational development
The Headley Trust	2nd instalment of a 2-year grant towards core costs
Postcode Neighbourhood Trust ( <i>a grant giving charity funded entirely by players of the People's Postcode Lottery</i> )	A grant towards core costs to increase beneficiary numbers
The Shears Foundation	A grant towards core costs
Benenden Health Community Fund	For musician fees for Acomb Singers
The Whitwam Family Charitable Foundation	A grant towards core costs
The Utley Foundation	For a Coronation concert with members of York Medical Group's Tower Court Singers, plus other groups
Barchester's Charitable Foundation	For musician fees for York Medical Group's Tower Court Singers and Monkgate Wellness Choir
The Victoria Wood Foundation	For musician fees for Gale Farm Court
The Feoffees of St Michael's Spurriergate	1st instalment of a 2-year grant towards core costs
The Dulverton Trust Fund	A grant towards core costs

## Musical Connections

(Charity Number 1165993)

**Notes to the accounts for the year ended:**

**31st March 2024**

	Balance b/ fwd £	Income received £	Resources expended £	Transfer of funds £	Balance c/ fwd £
<b>Unrestricted funds</b>	<b>39,433</b>	<b>27,974</b>	<b>30,096</b>	-	<b>37,311</b>
Brelms Trust CIO	3,858	-	3,858	-	-
Charles Hayward Foundation	-	5,000	1,945	-	3,055
D'Oyly Carte Charitable Trust	-	3,000	-	-	3,000
Liz & Terry Bramall Foundation	-	5,000	3,532	-	1,468
Garfield Weston Foundation	10,065	10,000	10,065	-	10,000
Awards for All	-	9,200	7,537	-	1,663
Arts Council England	3,030	3,472	6,502	-	-
Headley Trust	2,917	-	2,917	-	-
Postcode Neighbourhood Trust	-	15,000	-	-	15,000
Shears Foundation	10,000	-	10,000	-	-
Benenden Health Community Fund	1,950	-	1,950	-	-
Whitwam Family Charitable Foundation	5,000	-	5,000	-	-
Utlely Foundation	1,000	-	1,000	-	-
Barchester's Charitable Foundation	-	975	975	-	-
Victoria Wood Foundation	-	2,940	700	-	2,240
Feoffees of St Michael's Spurriergate	-	10,000	-	-	10,000
Dulverton Trust Fund	-	5,000	-	-	5,000
<b>Total Restricted</b>	<b>37,820</b>	<b>69,587</b>	<b>55,981</b>	-	<b>51,426</b>
<b>Total Funds</b>	<b>77,253</b>	<b>97,561</b>	<b>86,077</b>	-	<b>88,737</b>

### Transfer between funds

Funds have been transferred from unrestricted funds to various overspent restricted funds.

# Musical Connections

(Charity Number 1165993)

**Approval of accounts for the year ended:**

**31st March 2024**

The report and accounts were approved at a meeting of the Trustees held on:

24<sup>th</sup> September 2024



30<sup>th</sup> September 2024

**Signed for and on behalf of the trustees**

**Date**

J FARRINGTON

TREASURER & TRUSTEE

**Print name**

**Position (e.g. Chair etc)**

**MUSICAL CONNECTIONS**

England & Wales - Charity number 1165993

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# Accounts

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*Happier, healthier lives through music*

## **Musical Connections Annual Report and Financial Statement**

31<sup>st</sup> March 2023



Reg. Charity No: 1165993



Supported using public funding by  
**ARTS COUNCIL  
ENGLAND**

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# ORGANISATIONAL DETAILS

**Type of Charity:** Musical Connections is a CIO (a Charitable Incorporated Organisation).

**Charity Registration Number:** 1165993

**Date of Registration:** 10th March 2016

**Postal Address:** PO Box 724, York, YO1 0HL

**Trustees:**

- Valerie Sutton (Chair)
- Jo Farrington (Treasurer)
- Chris Bartram
- Hazel Brown
- Richard Frost
- Fiona Chapman

**Bank:**

- NatWest
- City Centre Branch
- 1 Market Street
- York, YO1 8SR

**Accountants:**

- Outsource
- 29 Millfield Road
- York, YO23 1NH

Over the last year, the structure of our project team has changed. In July 2022, our longstanding Project Director handed over day-to-day project management to two of the team's musicians, whom she continues to mentor. Two more self-employed musicians have been heavily involved in delivering the project alongside the new project managers, and our Board of Trustees has continued to play an active role in supporting the team.

# GOVERNANCE

## Election of Charity Trustees

Clause 10.1 of our constitution states that ‘apart from the first charity trustees, every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees’. Clause 10.2 states: ‘In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.

## Additional Governance Information and Organisational Structure

Musical Connections’ board of trustees is stable, experienced, and very active, bringing together a range of skills and expertise. Our Chair was previously Group Manager of Adult Services for City of York Council, and brings extensive experience in managing and delivering care for older people. She is ably supported by the rest of the trustee board, which includes a retired GP, a former marketing manager, a former senior music lecturer from York St John University and a retired chartered engineer, who is also one of our choir members, enriching the board with his experience as a project beneficiary. Our former Project Director has also become a trustee, which has proved invaluable in providing continuity through the change in project management. She continues to write grant applications in support of the project, Together the board is well equipped to provide oversight and guidance for the project.

Our new Project Managers have been dedicated members of the Musical Connections (MC) team for several years, and are much-loved by MC beneficiaries in both care and community settings. They are excellent musicians and, during the lockdowns, took on additional responsibilities and developed new skills - they were key to our ability to cope with the challenges of Covid-19, and are now highly focused on ensuring our charity thrives in the post-pandemic environment. They continue to work as group musicians on the project, while providing strong leadership and overseeing our two other musicians, who are themselves highly trained and experienced in working with vulnerable older people who have a range of needs, interests, and abilities.

By April 2022, following the gradual resumption of in-person sessions in Autumn/Winter 2021-22, we were running 10 music sessions in a range of care and community settings (9 weekly and 1 fortnightly), and beneficiary numbers have grown steadily over the year. We have

retained the strong sense of 'family' that we developed with our group and choir members during Covid, and have also continued some digital activity informed by our learning and experiences during the pandemic.

## **Risk Management**

The Board of Trustees considers that they have complied with their duties to have due regard to the public benefit guidance published by the Charity Commission, and work collectively to review risks, systems, and procedures on a regular basis. One of our trustees has particular responsibility for Health and Safety, one of the Project Managers is the Designated Safeguarding Lead, and our Chair is the Deputy Safeguarding Lead.

# BACKGROUND AND OBJECTIVES

## Background

Following a tumultuous 2 years overshadowed by the Covid-19 pandemic, Musical Connections' musicians and beneficiaries have relished the opportunity to get back to a normal programme of sessions, events, and intergenerational activities. Nonetheless, we continue to make allowances for the risk of Covid i.e.:

- We have continued to use a CO2 monitor at our largest group of 50+ members, and open doors/windows when CO2 levels increase
- By mutual agreement, we have moved the groups we used to run in York Medical Group's GP surgeries into alternative venues nearby
- Members and musicians have been vigilant about testing and behaving safely when experiencing symptoms that could be Covid.

Overall, however, confidence has increased hugely, and almost all beneficiaries have demonstrated a strong desire to get involved, not just in regular group/choir sessions, but in additional events involving school children, students, and other members of the wider community.

## Objectives

The smooth transition in project management has ensured that we have continued to deliver on our charity's objectives i.e.:

- To advance the wellbeing of vulnerable and socially isolated older people
- To relieve isolation and social exclusion amongst vulnerable people
- To provide opportunities to vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

# ACTIVITIES DELIVERED AND BENEFICIARY NUMBERS

## Main Activities Delivered

Over the course of the year, the following activities were delivered by our team of dedicated musicians, all of whom were closely supervised by the Project Director until July, and, from then on, by the new Project Managers (who continue to be closely supported by the former Project Director):

- 339 music sessions with 303 beneficiaries in 10 care and community settings across York:
  - o 4 in City of York Council's sheltered housing schemes (3 weekly and 1 fortnightly) - advertised to and well-attended by members of the local community, as well as people living in the schemes
  - o 1 in a private care-home
  - o 3 in partnership with York Medical Group
  - o 2 community choirs (as we had to move out of their surgeries, York Medical Group has covered the cost of alternative venues nearby)
- 6-session summer project involving members from several of the above groups, culminating in a city-centre busking event
- 26 intergenerational workshops, concerts, and projects, involving 819 children and young people
- 3 collaborative video recordings involving contributions from group members and intergenerational partners, e.g.:
  - o A recording of Waterloo in celebration of the Queen's Jubilee: [https://youtu.be/mxCLOUm3FzY?si=xBN\\_HB0ZpV9hfdqg](https://youtu.be/mxCLOUm3FzY?si=xBN_HB0ZpV9hfdqg)
  - o A Christmas recording of Sleigh Ride: [https://youtu.be/\\_sf0DzzHKOg?si=NG8kYb-XAR4SzEAR](https://youtu.be/_sf0DzzHKOg?si=NG8kYb-XAR4SzEAR)
  - o A Spring recording of Build Me Up Buttercup: [https://youtu.be/OfPcA-FPLIQ?si=3M8wIM-W\\_yL1dcqm](https://youtu.be/OfPcA-FPLIQ?si=3M8wIM-W_yL1dcqm)
- 21 additional community-based events involving a further 200 vulnerable and older adults, such as informal concerts at Age UK day clubs, carol-singing, and formal

concerts with other choirs in traditional concert venues e.g., the Joseph Rowntree Theatre, and York St John University's Creative Centre

Free transport was provided for anyone who needed it, to enable them to attend both weekly sessions, and additional community-based events.

Alongside the groups, our musicians and volunteers have stayed in touch with group and choir members between sessions, ensuring everybody has had the information and support they have needed to be able to attend sessions, and to identify where extra help may be required.

We have also completed a digital inclusion project which we started in January 2021 (see Digital Activities section for further information).

*What the team do at Musical Connections is amazing. Music is universal and to be able to bring people together through this medium and create true happiness and positivity are just some of the many reasons I feel so privileged to be an ambassador. I've been lucky enough to witness first-hand the joy that the sessions bring to the lives of those involved, and the more people that can hear about and get on board with the charity, the better.*

(Laura Castle, local radio presenter and Musical Connections ambassador, pictured centre below)



# 2022/23 AT A GLANCE

Over the course of the year, the number of beneficiaries engaging in weekly/fortnightly music sessions increased from 208 in April 2022 to 303 by the end of March 2023, plus c.200 additional vulnerable older people who took part in 21 additional, one-off events in the wider community. In addition, 819 children and young people from a local nursery, schools and universities took part in intergenerational activities with beneficiaries. 39 people, who would otherwise have been unable to get involved in community-based creative activities, made use of our offer of free transport.

26 INTERGEN-  
ERATIONAL  
SESSIONS  
ORGANISED



819 CHILDREN  
AND YOUNG  
PEOPLE INCLUDED  
IN THE PROJECT



378 IN-PERSON  
SESSIONS  
AND EVENTS  
DELIVERED



500+ PEOPLE  
REACHED DURING  
WEEKLY SESSIONS  
AND 21 ADDITIONAL  
COMMUNITY-  
LINKED EVENTS



4,102 ATTENDANCES  
REGISTERED  
ACROSS THE  
WHOLE PROJECT

# IMPACT ON PARTICIPANT WELLBEING

Feedback from beneficiaries suggests that the work we have done since the easing of restrictions has had a significant positive impact on their wellbeing, enabling them to re-connect fully with their musical family and the wider community.

During two tracking phases (October 2022 and March 2023), 128 beneficiaries completed feedback questionnaires.

- **98%** said going to their MC session **improved their mood** on the day (**89%** said **greatly**):



*It would be almost impossible to feel down after a session with Abby and Tiffany, it's not just the music we make, but the laughter and good humor, they are an absolute pleasure to be with.*

*Always has, and always will have, a positive impact on my mood!*

*Charlotte is so full of energy; it's infectious!*

- **99%** said that weekly sessions make them **feel generally happier and more positive about life** (**78%** said that they **greatly** improve their happiness):

*The positivity and friendliness of the choir and its leaders are great, and there are always plenty of smiles.*





*Everyone goes home with a feeling of content and  
with a big smile on their face.*

*I just feel happy to be here on a Thursday!*

*I think it's good for all of us, we all get together, we all  
have a good time - it's really entertaining too.*

- **96%** said that participating in their MC group **improves their confidence/self-esteem** (65% said **greatly**):

*It builds your confidence because we are just a bunch of friends doing what we love.*

*It gives me a feeling of achieving something that I didn't believe I could – performing in public.*

*Makes me feel I am wanted. Loneliness is a terrible thing, believe you me.*

*Since my husband died, I lost a lot of confidence in myself. If I can sing and get it right, it's a great help to my confidence.*



- **95%** said that their MC sessions help them to **feel more alert and active**:

*We're doing things that we wouldn't normally do on our own in our flats - singing to yourself, playing a horn, we're communicating with each other.*

*It brings back memories of my Mum, and my memory in general.*

*I really appreciate the challenging nature of doing something I'm not good at! Lovely atmosphere, and great to be learning something completely new at 75.*

- **95%** said that participating in the sessions **gives them a sense of purpose and something to look forward to**:

*Coming to choir is one of the highlights of my week, without a doubt.*

*I wouldn't want to stop coming, it gets me motivated and up on a Wednesday morning.*

*It's something to look forward to each week. It has the most wonderful feeling.*

*I do look forward to Tuesday choir. Meeting friends, picking up on the latest gossip and singing, what's not to like!*

*Even when things are bad, I still want to go to the group.*



- **95%** said that participating in MC events and sessions gives them an opportunity to make **increased contact with other people/the wider community**. For many, it is the only regular social and creative activity available to them:

*I wanted to join a group where I could sing, and meet new people, as I was quite isolated at home, caring for my disabled husband.*

*I enjoy being part of this happy choir and the connections from the Big Sings and school events.*

*I enjoy socialising, as I don't usually go anywhere.*

*A wonderful opportunity to be with people.*





- **92%** said that they have **made new friends** since joining the group:

*They're really nice people, and they always have a nice smile - it's just jolly!*

*Friendship. It's lovely coming out and meeting people. It's making me happier. My husband has noticed. I love coming here. It gives me a purpose to get up. It gives me positivity and I hope it continues!*

*The group as a whole - the friendliness of every member.*

- **97%** said that going to their MC group **improves their overall life satisfaction** and **52%** said it improves **greatly**. Weekly sessions and additional events in the wider community appear to give people who are struggling with loneliness something positive to think about and to draw upon during difficult times.



*Mentally I feel that I'm a happier person and enjoy everything I do with MC. That gives me a reason to go on living life to the full.*



*It is just an absolute pleasure to be a part of this very special organisation. Thank you to you all.*

*I just love everything about it, the singing, the leaders, the feeling of success when we get it right, and the friendship. There are no loners, everyone is so friendly.*

*It has been probably one of the best things I have done in recent years. The pleasure and improvement in my health since I joined the various groups has made a great difference to my life. I so look forward to anything that MC is involved with. The feeling of being a part of the MC family is so heart-warming, and I feel very proud and privileged to be involved.*

- **96%** said that MC sessions improve their overall wellbeing.



*I'm telling you; it's made me a greater person since coming here - I've learnt a lot, and I want to carry on - I want to do more.*

*Being part of Musical Connections really enhances my week - concentrating on learning something new, the satisfaction of creating harmonies, being a bit silly with like-minded people, and being with familiar and friendly faces that we can trust. The energy and sense of wellbeing that is released at MC is sustaining and really lifts my mood during the week. I'm proud to be a member.*

*I just love coming every Wednesday. I would miss it terribly if we didn't have it! If I could bottle I would!*

*It's an important time of the week for me, I see friends, enjoy a good sing, and can forget other distractions in my life for a little time.*



- **91%** believe that participating in sessions **improves their physical health**. The focus and concentration needed to engage fully in session activities helps reduce rumination, anxiety, and stress, giving people a sense of clarity and helping them to feel calmer and more centered:

*I just really look forward to Wednesdays. I've been unwell and not been making it as often but today it's lifted my whole body.*

*As someone who suffers from COPD, the singing really does help with my breathing.*

*The physical warmups at the start of choir are fun as well as being good for us.*



- The work that we did throughout the coronavirus lockdowns had the effect of making our musical community stronger and closer than it was before. This sense of connection has been sustained, with many members continuing to refer affectionately to 'Our Musical Family'. **98%** said that they continue to **feel a valued member of the MC family** and **70%** said **greatly**.

*Just love being part of this special family!*

*It is like another family.*

*It gives people the chance to feel worthwhile and be part of a family.*



*The leaders know everyone by name which literally helps members to feel 'recognised'. I think that asking members to help with little jobs also helps individuals to feel valued and gives them opportunities for increased engagement with the group.*

*Charlotte is a very good leader; she knows all our names and is always able to answer any questions.*

*We are always listened to as a group - group led definitely. We feel we have an input, as does Abby to us. It's a two-way street.*

## Social Prescribing

Pre-Covid, Musical Connections was working closely with York Medical Group (YMG), who were leading the development of social prescribing in York at that time. While YMG continues to lead the way, social prescribing has become a city-wide initiative, with widespread acceptance of its ability to provide patients with legitimate non- medical solutions to their problems. We have now worked with YMG for over 5 years as a social prescribing partner. No longer able to base ourselves in their surgeries, we have found alternative venues for these groups in the wider community - YMG is covering the rental costs for us, and despite the loss of contact with patients in the surgeries, our strong relationships with YMG/NHS social prescribing link-workers continue to ensure a steady stream of referrals.



## DIGITAL ACTIVITIES

During the lockdowns, the technology gap became strongly evident; those with internet access were able to participate in our large range of online activities, whereas those without it felt increasingly isolated, despite regular telephone and postal contact. In response, after a small pilot project in two of the council's sheltered housing schemes, we purchased a stock of tablets, and between January and March 2022, conducted a tablet training project with 2 of our music groups (one community-based and one sheltered housing scheme). As most group members had never used a tablet before, we wanted to ensure that they felt as though they were experiencing genuine benefits from having digital access – teaching them how to browse the internet, take pictures, access song lyrics and record parts of the sessions. Some members struggled, citing an inability to understand the digital world, however others were keen to learn, and in feedback questionnaires completed with 11 beneficiaries who had retained their tablet throughout the programme (9 from the community-based group and 2 from the sheltered housing scheme group), it was gratifying to see that the number of people perceiving the benefits of tablet usage had increased, with all having enjoyed the process, and keen to continue using them in the future. One member found digital access so beneficial, both during weekly sessions and at home, that she bought herself her own tablet, and had broadband installed at home.

*'It's made me buy one, so it's definitely done something! I've got the internet too, so it's made me do that – I do find it useful'*

In September 2022, based on the above learning and member experience, we introduced a further 14 tablets to a third (sheltered housing scheme) group, alongside supporting 11 members in the original 2 groups. Whilst most of the group acknowledged that a tablet could potentially be useful in connecting with other people, again, there was some resistance to being involved, with 4 refusing to take a tablet and 3 returning it soon after the programme commenced. In response to this, the group's musician tried to incorporate the tablets in a more relaxed format; encouraging members to take photos or read lyrics that she had already accessed for them online, however, this still triggered feelings of confusion and frustration. Many group members also struggled to remember to charge the tablets or bring them to weekly sessions, making it particularly difficult for the group's musician to assist them, and increasing the divide in skillset within the group. The remaining 6 beneficiaries continued to trial using the

tablet, both at home and during sessions, however, in feedback questionnaires, only 2 reported that they would continue to use it after the culmination of the training programme.

Subsequent to our experiences during the lockdowns and as technology becomes an integral part of our everyday lives, we were hopeful that providing group members with tablets would offer a gateway to a digital world that was previously inaccessible to them; providing maximum opportunity for them to engage with each other, access online creative opportunities, and connect with the wider world. Whilst this was largely successful in the community-based group, with 9 still regularly using their tablet, both at home and during sessions, members in the sheltered housing scheme groups struggled, and even with additional time and resources, made little or no progress. In summary, a desire and commitment to learn is clearly imperative in overcoming the digital divide; some members were keen to do so, and have consequently flourished in a newfound digital world, however others, despite the groups' musicians' efforts, lacked any perceived need or benefit, content without the additional connectedness the tablet might offer.

# MUSICAL CONNECTIONS' MAGIC

## INGREDIENTS

Over the 14 years that Musical Connections has been running, including throughout the coronavirus pandemic, we have seen how these ingredients have combined to create a formula which has enabled us to consistently deliver a creative, high-quality, and adaptable project which has become greatly valued in York, both by its beneficiaries and by the wider community, including healthcare professionals.



### IN MORE DEPTH:

#### Clear Values and Carefully Considered Working Practices

The following characteristics are cornerstones of our work:

**Continuity:** During Covid-19, our determination to maintain the beneficiary friendships and community connections developed prior to the emergence of the virus and to provide a continuous programme of musical and social activities through all levels of restrictions meant that, as we emerged from the pandemic, many of these friendships and connections were even stronger than before. Our ongoing commitment to providing a continuous programme of sessions, events and related activities (structured loosely around the academic timetable) has ensured that these relationships continue to flourish.

**Inclusivity:** We welcome any older person who wishes to join us, regardless of ability or disability. We do not believe in compartmentalising people and have been told, particularly by people living with dementia, that they prefer not to be pigeon-holed as such, but would rather mix with other members of the community as they would have done before their diagnosis. Throughout the pandemic, we received referrals from local agencies seeking support for vulnerable and chronically isolated older people, and we became known for our flexibility and willingness to provide the support needed to enable people to get involved despite the restrictions both we and they were facing. We continue to work hard in our 'new normal' to circumvent any obstacles which prevent potential beneficiaries from joining us.

**Avoidance of stereotyping:** We do not make assumptions about participant preferences and invite them to engage with all kinds of musical genres and activities. In concerts and city-centre busking this year, members pulled off fantastic performances of songs by artists such as Madonna, to rapturous applause.

**Providing opportunities to learn and achieve:** Beneficiaries, including those with learning disabilities or dementia, have repeatedly demonstrated that they enjoy and are stimulated by being offered a degree of challenge e.g., learning and composing new songs. Simply re-visiting old favourites can get boring after a while.

**Building on participant skills and interests:** Where participants have shown a particular talent, we have worked hard to celebrate it. Group/choir members who wish to are invited to perform solo or with small ensembles, while this year, for the first time, two members used their considerable artistic skills to deliver art workshops for members of our sheltered housing groups.

**Good relationships between the project musicians and carers/staff in care settings:** Our team works hard at developing positive relationships with others who have responsibility for the welfare of our beneficiaries. We aim to develop an understanding of each other's issues, and to

develop mutual respect, which ensures that the project is delivered collaboratively, with a shared focus on how to maximise benefits for participants.

*Chris loves coming to the choir, especially when he's up with Charlotte, dancing and teaching us Makaton. He's had a lot of bad experiences with people and lacks confidence, but he's the life and soul of the Rolling Tones, and comes away so happy and confident – it's amazing.*

*(Lisa, Chris' carer)*

**Ensuring participants are fully involved in evaluation and planning activities:** While most participants tell us that they would rather be making music than discussing the process/project, they appreciate being asked for their opinions about their group, and for guidance on its future development. In an extension of this work, a beneficiary steering group was created in early 2022, which has helped to provide extra insight and support for the team over the last year.

**Disciplined and focused tracking and evaluation activities:** Involving beneficiaries and volunteers in the following activities has given us great insight into the impact of our work, enabling us to move forwards with confidence and an understanding of what beneficiaries need and value:

- A mix of data-collection approaches i.e.: individual interviews; group sessions and video-making has maximised the extent and type of information gathered. Please follow the link to watch a Q&A video with a member of one of our sheltered housing groups: <https://youtu.be/TL5oDMpi7NM>
- Where participants have struggled to understand the process, adapting questioning styles to meet the needs of each individual has facilitated their involvement
- To gauge the accuracy of the information gathered by the musicians in their self-evaluation activities, trustees have visited individual groups to observe sessions and talk to participants

Continuous review of the process has optimised participation in it and the usefulness of the information collected. While adjusting to in-person work, it has been very helpful to be able to gauge how beneficiaries have adapted to our 'post-Covid' project, and to understand how re-connecting with their musical family has benefited them.

## **Support Offered to Beneficiaries Between Sessions**

The intensive support we provided to our beneficiaries during the pandemic has left a lasting legacy and, since returning to in-person sessions, our musicians and volunteers have continued

to work incredibly hard to maintain contact with beneficiaries between sessions, helping them to sustain the connections formed within the groups, and identifying the support needed for them to access as many as possible of the numerous musical activities on offer. As a consequence of this additional work, we can say with confidence that we do not just offer participants a weekly creative outlet, but a much more profound social and creative framework which, over time, becomes the bedrock of many beneficiaries' lives, giving them friendship, a sense of belonging and numerous experiences to look forward to and to enjoy together.

## Creative, Skilled and Dedicated Musicians

In the second year of the pandemic, our musicians were light on their feet, adapting constantly to evolving restrictions, and taking advantage of every increase in freedom to generate new opportunities for face-to-face activities with beneficiaries.



It is testament to the excellent relationships they maintained with beneficiaries during the lockdowns that it was a relatively seamless process to reunite the groups indoors in September 2021.

Over the last year, the musicians have continued to re-embrace the established practices of Musical Connections, working hard to achieve a balance between accessibility and providing a level of challenge which requires focus and application from group participants. An emphasis on developing musical understanding and offering more complex experiences than traditional singalongs is appreciated by beneficiaries who are keen to use their brains and skills and to embrace an opportunity to learn and experience something new without feeling any pressure.

The musicians provide a welcoming and supportive environment for these activities to take place and fully understand that, while the music gives group members focus and purpose, the groups need to be delivered in a way that maximises relationships with and between everyone involved – the musicians all know that, ultimately, the purpose of the music is to facilitate these relationships and is not an end in itself. This knowledge and understanding is what helps them to deliver our project so effectively – and is also what drives them to stay in



contact with some of our most vulnerable members between sessions – they appreciate that ‘our musical family’ extends beyond the boundaries of session times.

Alongside traditional music-making, the musicians have embedded digital activity within the project (see above). This has only been possible because of their own excellent digital skills, which they honed out of necessity during the pandemic.

## A Sizeable Volunteer Team

Following the pandemic, we experienced a drop in volunteers and launched a new recruitment drive, which enabled us to replace many of those we had lost. By the end of the year, 22 volunteers had supported the project, with 14 of these as regulars, and 4 students who worked with us on an ad-hoc basis. At the end of March 2023, we had:



Our beneficiaries benefit hugely from the volunteers’ contributions:



*We have a blind gentleman from Bermuda of 91 years old who loves to come and join in with the singing. He lives in the next village to me, so I collect him up en route. He lives in sheltered housing, and his family have entrusted me with his keys. He really appreciates the shared company – we have so much in common and enjoy our afternoon together. In fact, he states that Thursday afternoons are the highlight of his week. He is always dressed and ready to go at 12.30, however, I don’t collect him until 2.30 – that’s how eager he is.*

It is apparent that the volunteers enjoy their work with us and benefit just as much as our primary beneficiaries from the social connection and musical participation that the groups offer

them. They are also inspired by the opportunities the project presents for them to use their skills and time in support of others.

*I get a lot out of being part of Musical Connections - both as a choir member and volunteer. I particularly appreciate being able to volunteer in tandem with other personal responsibilities I have. Finally, a huge shout out to the musicians who lead the groups with such enthusiasm and positivity. Being with them is like plugging into a charging point for a couple of hours - I emerge feeling completely energised!*

*MC shows off the power of music for getting people to smile, learn new songs and ideas, remember a tune they hadn't heard for ages and the memories that accompany it. I'm so glad I started volunteering!*

In questionnaires conducted with 7 volunteers, **ALL** said that volunteering for MC **improved their mood** that day (4 said **greatly**):

*Absolutely LOVE helping at the MC sessions - it's my favourite time of the week!*

*What I enjoy the most about volunteering is seeing how much the participants love the sessions; it gives me a high to be a part of that.*

**ALL** said that it made them feel **generally happier and more positive** (4 said **greatly**):



*It's good to be able to concentrate on helping others to enjoy singing, whilst enjoying myself. I stop thinking about all the negative things going on in the world.*

*What I love most of all about being a volunteer for MC is seeing everyone with a smile on their face and having fun! It's evident that the music and activities you provide for our groups make a huge difference to so many people. Such a positive environment makes me happy!*

*I just love to help those less fortunate than me. I try to bring a smile to their faces.*

*I love volunteering for the Musical Connections session. It has a really positive impact on my own wellbeing each week through the shared fun and*

*friendship. Everyone joins in and there is so much laughter, it is an absolute pleasure to be able to help support the group and feel part of it.*

*Volunteering at MC never felt like a chore; it was a fun chance to spend time with people I wouldn't meet otherwise. What they do at MC is amazing and a great model for all community groups.*

*It is with great happiness that I volunteer at Musical Connections. For me, volunteering heals me when I sing and dance with the elderly, like taking my mind off my current troubles.*

**ALL** said volunteering had helped to **improve their confidence (4 said greatly):**

*I feel confident within the group and it's good to be able to share my skills and interests.*

**ALL** said that being a part of the MC volunteering team had **improved their overall satisfaction with life (5 said greatly):**

*I just love it. If I can crack a joke or say something funny and hear their laughter; it warms my heart.*

*I learnt so much when volunteering with Musical Connections. The sessions are more fun, lively, and welcoming than I ever imagined, and the leaders bring an incredible energy to the sessions. They guarantee laughter every week for people who don't always have lots going on. One of my favourite parts of volunteering was chatting to the members and hearing their interesting stories. It felt like a safe space for them to talk.*



**ALL** said that they felt a **valued member of the MC family (5 said greatly):**

*I am always thanked by the musicians and by the family of the lady I support. She is always pleased to see me and often hugs me goodbye.*

*I know from both members' and team members' comments and reactions, that I am appreciated.*

**ALL** said they were **very happy with the communication and support** from the team.

Alongside our volunteer team, we have an active beneficiary steering group, which has provided useful feedback on the project, and helped to guide and support the musicians over the last year.



## Partnership Working

We receive regular referrals from City of York Council's Local Area Co-Ordinators, York Medical Group and NHS social prescribers. We are also connected to other related agencies such as Age UK York, OCAY (Older Citizens Advocacy York) and York Cares, who are in a position to promote our work to potential beneficiaries and with whom we occasionally run joint events or projects. Similarly, we benefit from a positive relationship with Make It York, a local authority funded agency working to raise the profile of York's local organisations and connect them with the wider community.

More generally, we benefit from York CVS's excellent support for the voluntary sector in the city, and regularly attend their training and information sessions. and we are members of the Music for Healthy Lives Research and Practice Network steering group, an initiative led by the University of Leeds.

After 14 years of successfully delivering and developing our project, we are really starting to become embedded within the York community, and our project partners clearly value our ability to work with them to provide tailored solutions to overcoming the barriers that prevent older people from being able to stay involved with their local community. The following comment is from the Chief Executive of York Medical Group:

*'Musical Connections is an incredible organisation that works with our (older) patients, gets them together, helps them to find their singing voice and fills their hearts (and mine) with joy. While the mode is music, the outcome is healing through the magic of music, and it has been amazing to watch how the project has grown. We want to be able to prescribe music, not pills, and we know Musical Connections can help us to do 'this'.'*



## Free Transport



When Musical Connections began working in community settings, it quickly became apparent that transport was a huge barrier for some potential beneficiaries, who could not use public transport or taxis because of disability or a lack of money. Free transport is now firmly embedded in our offer and continues to make a huge difference for people who would not otherwise be able to get to weekly sessions or additional events in the wider community. 39 participants have used this service over the last year, relying either on volunteer drivers or local taxi firms, who are aware of our beneficiaries' circumstances and needs, and have provided updated safeguarding policies which cover Covid safety. Please use the following link to watch a video which aims to illuminate the role of free transport in the life of our project: <https://youtu.be/sf0DzzHKOg>

We know that our project partners find the offer of free transport hugely helpful in encouraging and enabling their clients to get involved with us, and we believe that our commitment to providing this service on a bespoke and ongoing basis sets us apart from many local services.

## Ongoing Relationships with Intergenerational Partners



Intergenerational work has always played a key role within our project. Our approach is one of mutuality and an expectation that everyone involved will play an equal and active role, so that all participants, regardless of age, have a sense of purpose and a properly shared and meaningful experience. It delivers immediate and direct benefits to participants, both younger and older, as well as wider sustainable benefits relating to cross-generational understanding.

Its success is built on:

- Providing enjoyable opportunities for interaction and communication between younger and older generations, where the music cuts across age and social stereotypes, and can be accessed and enjoyed by everyone, regardless of age.

- A collaborative approach, whereby the Musical Connections musicians work with teaching staff to devise projects and events which have a benefit, not just for our core beneficiaries, but for the children and young people too. Sometimes this means working with teachers to devise musical activities that link into the curriculum while at other times, it is simply about using music creatively to help everyone relax, get involved and enjoy each other's company. By working in this way, we have found that educational establishments are much more likely to commit to ongoing collaboration than if we base our approaches to them on a vague notion of public-spiritedness and social conscience.



Over the last year, we have worked with the following:

BURTON GREEN PRIMARY SCHOOL	CLIFTON DAY NURSERY	CLIFTON PREP SCHOOL
MILLTHORPE SECONDARY SCHOOL	SCARCROFT PRIMARY SCHOOL	ST AELRED'S PRIMARY SCHOOL
WESTFIELD PRIMARY SCHOOL	UNIVERSITIES OF YORK AND YORK ST JOHN	VALE OF YORK ACADEMY

The interactive content and the regularity of this work helps isolated older people to get involved or re-involved in the life of their community, and to enjoy positive experiences and connections with other people and generations. The evidence suggests that it is an equally positive experience for younger participants.

*It was such an incredible experience for the children, and they were raving on the way home about how much they had enjoyed it.*

Scarcroft Primary School Teacher

*The workshop was a brilliant experience for all of us. It was great to see the children interacting together and with adults of different ages. They enjoyed the singing and combining movement/instruments to add meaning to the songs. A highlight was the game at the end of the session where the children and adults worked as a team to achieve a goal.*

Burton Green School Teacher

## **Solid Financial Management**

As the Covid-19 pandemic subsided, our priority was to move out of crisis mode, and to focus on longer-term sustainability. We were delighted that several funders, including Arts Council England, were keen to support us in this. By the end of the year, we had increased our reserves and had significant grant funding in place for the coming year.

The grant funding was complemented by income from voluntary participant contributions at weekly sessions (we request £4, but do not exclude anyone who is unwilling or unable to contribute), community fundraising and additional donations from members and project supporters.

## **Steadfast and Supportive Board of Trustees**

Prior to this year, our Board of Trustees remained unchanged for several years, while this year has seen the addition of our former Project Director, who has stepped down from running the project, while continuing to mentor our new Project Managers, and to write grant applications in support of the charity. Her knowledge and experience are a valuable addition to those of the other trustees: our Chair was previously Group Manager of Adult Services for City of York Council, and our Treasurer is a former marketing manager within Leeds City Council. A retired GP, a former senior lecturer in Music at York St John University and a retired engineer, who is also a Musical Connections choir member, make up the rest of the Board.

## FUTURE PLANS

With 10 groups and choirs now running smoothly once more, and with new Project Managers in place, the next 12 months will see us:

- Continuing to promote and expand our groups and choirs - we expect to work with at least 330 vulnerable older people at weekly sessions, plus another 150-200 at additional events in the wider community
- Continuing to re-build our intergenerational programme alongside other community-linked events, with the intention of delivering up to 50 outreach sessions and events per year
- Embedding digital activities alongside the core group work by continuing to create collaborative recordings and to provide ongoing support to members who are getting to grips with their tablets
- Maintaining an ongoing search for volunteers – although we have some longstanding regulars, and notwithstanding our new recruits, we wish to pre-empt any change in numbers by ensuring that we always have new people coming through
- Working closely with our beneficiary steering group, which we set up in January 2022, and which provides additional insight and guidance for the development of our work
- Continuing to provide close support to our new Project Managers, who are still in the first year of their new role.

# FINANCES

## Income and Expenditure

Table 1 highlights the overall receipts and payments from 1st April 2022 to 31st March 2023, the brought forward balance at the end of 21/22, and the subsequent bank balance.

The total receipts up to 31st March were £80,849, and the total payments were £83,801, which leaves a deficit balance of £2,952 for the financial year. When added to the carried forward balance from 2021/22 (£80,205), this left Musical Connections with a total balance of £77,253 for the end of the financial year.

The total amount of receipts allocated to unrestricted funding was £29,010, and there were payments to the value of £26,031, thus leaving an unrestricted surplus of £2,979 at the end of 2022/23. When added to the balance brought forward at the end of 21/22 (£36,459) and accounting for some minor transfers of funds (£5), this leaves the charity with £39,433 of unrestricted funds.

The total amount of receipts allocated to restricted funding was £51,839, and there were payments to the value of £57,770, thus leaving a deficit balance of £5,931 in restricted grants to carry forward into the next financial year. When added to the balance of restricted funding brought forward at the end of 21/22 (£43,746) and allowing for a small number of transfers between funds, this leaves Musical Connections with £37,820 in restricted funds to carry forward into 23/24.

The total receipts received in 22/23 (£80,849) were made up of grants received £51,839 (64%), followed by session fees and contributions of £14,177 (18%). Donations from organisations (£2,000), community fundraising (£4,348) and individual giving (£8,485) together represented the remaining 18% of the total.

The top five categories of payments and the % of the total (£83,801) they accounted for, were as follows:

Musicians' session fees	- £30,695 (37%)
Project management fees	- £24,836 (30%)
Beneficiary transport	- £8,956 (11%)

Community involvement activities	- £7,398 (9%)
Venue hire costs	- £4,301 (5%)

Table 2 provides a breakdown of receipts and payments for unrestricted funds and each restricted fund. It also provides the current surplus for each fund, the amount brought forward from 21/22 and the funds carried forward at the end of the financial year. This table also shows where payments were made against a brought forward balance from 21/22 rather than a receipt in 22/23 e.g., The Brelms Trust CIO

Table 3 shows the statement of Musial Connections' assets and liabilities on 31st March 2023.

**Table 1: Receipts and Payments for the year ending: 31<sup>st</sup> March 2023**

<b>Musical Connections</b>				
(Charity Number: 1165993)				
<b>Receipts &amp; payments accounts for the year ending:</b>			<b>31st March 2023</b>	
	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>2023 Total funds</b>	<b>2022 Total funds</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Receipts</b>				
Session fees & contributions	14,177	-	14,177	9,018
Grants	-	51,839	51,839	80,045
Donations from organisations	2,000	-	2,000	4,687
Donations from individuals	8,485	-	8,485	2,511
Community fundraising	4,348	-	4,348	4,513
<b>Total receipts</b>	<b>29,010</b>	<b>51,839</b>	<b>80,849</b>	<b>100,774</b>
<b>Payments</b>				
Session costs - musicians	5,840	24,855	30,695	17,596
Marketing & Website	676	435	1,111	1,278
Meeting costs	75	375	450	259
Transport costs	214	8,742	8,956	2,145
Session & event resources	1,437	229	1,666	5,941
Insurance	138	380	518	372
Project management costs	12,476	12,360	24,836	22,140
Administration & office costs	696	197	893	1,085
Funding bids & fundraising	820	-	820	884
Training costs	915	630	1,545	1,786
Community involvement activities/volunteer management - musicians	1,669	5,729	7,398	16,753
Venue costs	613	3,688	4,301	1,722
Volunteer costs & DBS checks	12	-	12	144
Independent examination Evaluation	300	-	300	300
	150	150	300	
Covid self isolation payment	-	-	-	378
Miscellaneous expenses	-	-	-	131
<b>Total payments</b>	<b>26,031</b>	<b>57,770</b>	<b>83,801</b>	<b>72,914</b>
<b>Net of receipts/(payments)</b>	<b>2,979</b>	<b>(5,931)</b>	<b>(2,952)</b>	<b>27,860</b>
<b>Transfers between funds</b>	<b>(5)</b>	<b>5</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>36,459</b>	<b>43,746</b>	<b>80,205</b>	<b>52,345</b>
<b>Balance carried forward</b>	<b>39,433</b>	<b>37,820</b>	<b>77,253</b>	<b>80,205</b>

**Table 2: Unrestricted and Restricted Funds**

	Balance b/fwd £	Income received £	Resources expended £	Transfer of funds £	Balance c/fwd £
Unrestricted	<u>36,459</u>	<u>29,010</u>	<u>26,031</u>	<u>(5)</u>	<u>39,433</u>
Brelms Trust CIO	1,445	5,000	2,587	-	3,858
Wharfedale Foundation	1,360	-	1,360	-	-
Hobson Charity	2,921	-	2,925	4	-
HDH Wills 1965 Charitable Trust	70	-	70	-	-
Ashley Family Foundation	1,570	-	1,570	-	-
Garfield Weston Foundation	7,459	10,000	7,394	-	10,065
Awards for All	3,230	-	3,231	1	-
Arts Council England	17,248	13,889	28,107	-	3,030
Purey Cust Trust	854	-	854	-	-
Headley Trust	2,792	5,000	4,875	-	2,917
Postcode Neighbourhood	4,797	-	4,797	-	-
Shears Foundation	-	10,000	-	-	10,000
Benenden Health Community Fund	-	1,950	-	-	1,950
Whitwam Family Charitable Foundation	-	5,000	-	-	5,000
Utley Foundation	-	1,000	-	-	1,000
<b>Total Restricted</b>	<u><b>43,746</b></u>	<u><b>51,839</b></u>	<u><b>57,770</b></u>	<u><b>5</b></u>	<u><b>37,820</b></u>
<b>Total Funds</b>	<u><b>80,205</b></u>	<u><b>80,849</b></u>	<u><b>83,801</b></u>	<u><b>-</b></u>	<u><b>77,253</b></u>

**Transfer between funds**

Funds have been transferred from unrestricted funds to various overspent restricted funds.

**Table 3: Statements of Assets and Liabilities on 31<sup>st</sup> March 2023**

**Musical Connections**  
(Charity Number: 1165993)

<b>Statement of assets and liabilities at:</b>		<b>31st March 2023</b>			
	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>2023 Total funds</b>	<b>2022 Total funds</b>	
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>	
<b>Assets</b>					
Current bank account	39,324	37,820	77,144	80,061	
Petty Cash	109	-	109	144	
	<b>39,433</b>	<b>37,820</b>	<b>77,253</b>	<b>80,205</b>	
<b>Assets retained for charity's own use</b>	Fund		Cost	Current value	
			£	£	
<b>Details</b>					
45 x tablets	Awards for All		4,455	3,308	
	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>2023 Total funds</b>	<b>2022 Total funds</b>	
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>	
<b>Liabilities</b>					
Independent examination fee	350	-	350	300	
	<b>350</b>	<b>-</b>	<b>350</b>	<b>300</b>	



## Fundraising

Our income comes from 4 main sources:

- grants and organisational donations
- voluntary participant donations at sessions
- individual donations and community fundraising
- direct fee income

**Grants and organisational donations:** in Autumn 2021, we secured a significant amount of grant funding, which secured our work for the whole of 2022-23, and up until October 2023. The most significant of these were from the Garfield Weston Foundation (£30,000 over 3 years) and Arts Council England (£34,722 over 20 months). During 2022-23, we have secured new grant funding for spending in the second half of 2023.

**Weekly voluntary donations at sessions:** these have come from participants at our community-based groups. We suggest a £4 donation per session - some beneficiaries give more, some less and some nothing at all. While these donations are an important source of income for us, nobody is excluded if they are unable or willing to make a contribution.

**Direct fee income:** this has come primarily from a private care-home which has paid us directly for regular sessions. Age UK has also paid us for a handful of taster sessions at their day clubs

**Community fundraising and individual donations:** Community fundraising activities have included concerts, busking and carol-singing. Individual donations were boosted by an unexpectedly large donation of £5,000 from a friend of the project.

We would like to thank the following funders for their support over the last year:

Arts Council England

Ashley Family Foundation

Awards for All (National Lottery)

Benenden Health Community Fund

Brelms Trust CIO

Garfield Weston Foundation

Headley Trust

Hobson Charity

HDH Wills 1965 Charitable Trust

Postcode Neighbourhood Trust *(a grant-giving charity funded entirely by players of the People's Postcode Lottery)*

Purey Cust Trust

The Shears Foundation

The Utley Foundation

The Wharfedale Foundation

The Whitwam Family Charitable Foundation

## Reserves Policy

Musical Connections' Reserves Policy, approved by the Trustees in May 2022, states that the charity should hold a maximum of £42.7k in reserves. This level of reserves was set after careful consideration of all the potential reasons reserves would be needed e.g. to aid cash flow, contingency planning to mitigate against unexpected expenditure, to commit designated funds to expenditure not covered by annual income and finally the closure of the charity. After due consideration of all these potential calls on reserves, trustees took the decision that they needed to protect the beneficiaries in the event of having to cease operation, and therefore considered it prudent to hold in reserves six months of its operating costs plus additional funds to cover any professional services, e.g. legal or financial, required to aid the closure. £42.7k represents 50% of the current annual operational costs of running the project with an additional 10% to go towards paying for any professional services that may need to be employed. This level of reserves would protect the charity's beneficiaries, who are mainly socially isolated and vulnerable adults, and enable it to wind down its operation in a sustainable way, rather than abruptly withdraw its services, which would have a detrimental impact on their quality of life. At the end of 2022/23, the level of reserves held was £39,433.

APPENDIX: INDEPENDENT EXAMINATION AND  
TRUSTEES' ANNUAL REPORT

# **Musical Connections**

(Charity Number: 1165993)

## **Trustees Annual Report & Financial Statements for the year ended**

**31st March 2023**

# **outsourc**

Charity accounts preparation &  
independent examination service

# **Musical Connections**

(Charity Number: 1165993)

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## Trustees' Annual Report

From 1st April 2022

To: 31st March 2023

Charity's full name Musical Connections

Registered Charity number 1165993

### Objectives and activities

#### Summary of the purposes of the charity set out in its governing document

Musical Connections' objects, as set out in the constitution, are as follows:

- To advance the wellbeing of vulnerable and socially isolated people
- To relieve isolation and social exclusion amongst vulnerable people
- To provide opportunities for vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

#### Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts

This has been our first full year of indoor, in-person sessions since the outbreak of Covid-19. Over the course of 2022-23, our team of dedicated musicians, led by two project managers, has provided the following participatory music and related arts activities in a diverse range of venues:

- 4 music groups in City of York Council's sheltered housing schemes
- 1 in a private care home
- 3 singing groups in partnership with York Medical Group, taking place in community venues near their surgeries
- 2 community choirs

In addition to core sessions, members from across all of the groups have been involved in 47 intergenerational and community-based events, including:

- 26 intergenerational workshops, concerts, and projects, where group beneficiaries made music with children and young people from local schools and universities
- 21 community-based events involving group members singing at Age UK day clubs, carol-singing in local supermarkets and at local authority sheltered housing schemes, and performing in formal concerts with other choirs in traditional concert venues

We also delivered a 6-session summer project involving group members, which culminated in a city-centre fundraiser busking event.

Free transport was provided for anyone who needed it.

Our experiences during the Covid-19 lockdowns of 2020-21 highlighted the benefits of including digital and multimedia activities alongside our more traditional group work. In response, we have:

- Continued to create video recordings, including collaborations with intergenerational and community partners
- Included 11 art workshops for sheltered housing scheme group members
- Completed the second half of a 6-month tablet training programme aimed at enabling group members to use tablets during sessions, participate in online musical activities, and contribute to video recordings

The trustees consider that they have complied with their duties to have due regard to the public benefit published by the Charity Commission.

## Achievements and performance

**Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.**

During the financial year 2022-23, we ran a total of 339 in-person weekly (and, in the case of one group, fortnightly) sessions and events involving 300 older, vulnerable, and isolated beneficiaries. We included a further 200 vulnerable older people in the aforementioned additional intergenerational and community-linked events.

By the end of March 2023, we had worked with over 500 vulnerable, older people, and 819 children and young people. 128 beneficiaries completed feedback questionnaires over two tracking phases in October 2022 and March 2023, with the following findings:

- 98% said going to their Musical Connections session improved their mood on the day (89% said greatly)
- 99% said going to their group helped them to feel happier and more positive about life (78% said greatly)
- 96% said that taking part improved their confidence (65% said greatly)
- 91% said their physical wellbeing was improved
- 97% said they felt greater satisfaction with their lives
- 95% said going to their group improved their alertness and activity levels
- 95% said that it gave them a sense of purpose and something to look forward to
- 95% said it enabled them to make increased contact with other people
- 92% said that they had made new friends through their group
- 98% said they considered themselves to be a valued member of the MC family (70% said greatly)
- 96% said their overall wellbeing was improved

We have been aided in our achievements by a total of 22 volunteers who have:

- Worked as 'music buddies' at weekly sessions, supporting group members and musicians
- Provided members with transport to sessions
- Stayed in phone contact between sessions with particularly vulnerable members

Excellent relationships with a number of project partners have also been instrumental to our success. City of York Council's Local Area Coordinators and NHS social prescribers have made regular referrals, and York Medical Group, Age UK York, OCAY (Older Citizens Advocacy York) and York Cares have continued to promote our work to potential beneficiaries. We also benefit from York CVS' voluntary sector support and are members of the Music for Healthy Lives Research and Practice Network steering group, an initiative led by the University of Leeds. Laura Castle, radio presenter and Musical Connections ambassador, has also been a strong advocate for our work throughout the year.

*More details on our achievements and the wider impact of our work may be found in our Annual Report.*

## Financial review

### Review of the charity's financial position at the end of the period

At the end of the 22/23 financial year, Musical Connections had received £80,849 and made payments of £83,801, leaving a deficit balance of £2,952 for the year. This balance can be split into unrestricted and restricted as follows: a £2,979 surplus in unrestricted funding versus a £5,931 deficit in restricted grant income. When these are added to the carried forward balance from 21/22 (£80,205), this leaves Musical Connections with a total balance of £77,253 at the end of the financial year, split into an unrestricted fund of £39,433 and £37,820 in restricted funds.

### Statement explaining the policy for holding reserves stating why they are held

At the end of 22/23, the amount of reserves held was £39.4k. The Reserves Policy states that the maximum reserves held should be £42.7k, which at present reflects 50% of the core operational costs of running the sessions and an additional 10% to go towards paying for professional services that may need to be employed to aid closure. The ratio of reserves to net annual operating costs was 51:49 at the end of the financial year.

### Amount of reserves held

£39,433 of unrestricted reserves.

### Reasons for holding zero reserves

N/A

### Funds materially in deficit

N/A

### Explanation of any uncertainties about the charity continuing as a going concern

N/A

**Structure, governance and management**

Description of the charity's trusts N/A

Type of governing document Constitution

How the charity is constituted Charitable Incorporated Organisation

Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees Clause 10.1 of our constitution states that 'apart from the first charity trustees', every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. Clause 10.2 states 'in selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective management of the CIO'.

**Reference and administration details**

Charity's full name Musical Connections

Other names the charity is known N/A

Charity's principal address PO Box 724  
York  
YO1 0HL

**Names of the trustees who manage the charity**

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Val Sutton	Chair		
Jo Farrington	Treasurer		
Chris Bartram			
Hazel Brown			
Richard Frost			
Fiona Chapman		From 12/7/22	

**Names and addresses of advisers (OPTIONAL)**

Type of adviser	Name	Address
Independent Examiner	Karen Wood ACMA, CGMA	Outsource Accountancy Services & Independent Examinations Hiscox Building, Peasholme Green YO1 7PR
Bankers	Natwest Bank	

Name of chief executive or names of senior staff members  
N/A

**Declaration**

The trustees declare that they have approved the Trustees Annual Report and Accounts

Signed on behalf of the charity's trustees

Signature



Full Name Joanne Maria Farrington  
Position Treasurer  
Date 17/8/23

### Independent examiner's report to the trustees of Musical Connections

I report on the accounts of: **Musical Connections**  
for the year ended: **31st March 2023** which are set out on pages 5 to 8.

#### Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 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 material 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 Trust 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.

*K Wood*

**Karen Wood (ACMA)**  
Outsource independent examination  
service  
The Hiscox Building  
Peasholme Green  
York YO1 7PR

*8/9/23*

**Date:**

**Musical Connections**  
(Charity Number: 1165993)

**Receipts & payments accounts for the year ending: 31st March 2023**

	Unrestricted funds	Restricted funds	2023 Total funds	2022 Total funds
	£	£	£	£
<b>Receipts</b>				
Session fees & contributions	14,177	-	14,177	9,018
Grants	-	51,839	51,839	80,045
Donations from organisations	2,000	-	2,000	4,687
Donations from individuals	8,485	-	8,485	2,511
Community fundraising	4,348	-	4,348	4,513
<b>Total receipts</b>	<b>29,010</b>	<b>51,839</b>	<b>80,849</b>	<b>100,774</b>
<b>Payments</b>				
Session costs - musicians	5,840	24,855	30,695	17,596
Marketing & Website	676	435	1,111	1,278
Meeting costs	75	375	450	259
Transport costs	214	8,742	8,956	2,145
Session & event resources	1,437	229	1,666	5,941
Insurance	138	380	518	372
Project management costs	12,476	12,360	24,836	22,140
Administration & office costs	696	197	893	1,085
Funding bids & fundraising	820	-	820	884
Training costs	915	630	1,545	1,786
Community involvement activities/volunteer management - musicians	1,669	5,729	7,398	16,753
Venue costs	613	3,688	4,301	1,722
Volunteer costs & DBS checks	12	-	12	144
Independent examination	300	-	300	300
Evaluation	150	150	300	
Covid self isolation payment	-	-	-	378
Miscellaneous expenses	-	-	-	131
<b>Total payments</b>	<b>26,031</b>	<b>57,770</b>	<b>83,801</b>	<b>72,914</b>
<b>Net of receipts/(payments)</b>	<b>2,979</b>	<b>(5,931)</b>	<b>(2,952)</b>	<b>27,860</b>
<b>Transfers between funds</b>	<b>(5)</b>	<b>5</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>36,459</b>	<b>43,746</b>	<b>80,205</b>	<b>52,345</b>
<b>Balance carried forward</b>	<b>39,433</b>	<b>37,820</b>	<b>77,253</b>	<b>80,205</b>

**Musical Connections**  
(Charity Number: 1165993)

**Statement of assets and liabilities at: 31st March 2023**

	Unrestricted funds £	Restricted funds £	2023 Total funds £	2022 Total funds £
<b>Assets</b>				
Current bank account	39,324	37,820	77,144	80,061
Petty Cash	109	-	109	144
	<u>39,433</u>	<u>37,820</u>	<u>77,253</u>	<u>80,205</u>

Assets retained for charity's own use	Fund	Cost £	Current value £
<b>Details</b>			
45 x tablets	Awards for All	4,455	3,308

	Unrestricted funds £	Restricted funds £	2023 Total funds £	2022 Total funds £
<b>Liabilities</b>				
Independent examination fee	350	-	350	300
	<u>350</u>	<u>-</u>	<u>350</u>	<u>300</u>

## Musical Connections

(Charity Number: 1165993)

Notes to the accounts for the year ended:

31st March 2023

### 1. Basis of accounts

The Trustees have taken advantage of section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

### 2. Restricted income funds

Where funds were originally granted for face to face work, funders kindly allowed their grants to be re-deployed to support Covid - response activities.

Fund name	Purpose
Brelms Trust CIO	3rd instalment of a 3-year grant to deliver music groups and intergenerational activities
Wharfedale Foundation	For intergenerational work ('Generations in Harmony')
Hobson Charity	For the provision of free beneficiary transport
HDH Wills 1965 Charitable Trust	For the venue hire for Honeysuckle Singers
Ashley Family Foundation	Second instalment of a 2-year grant for core costs
Garfield Weston Foundation	2nd instalment of a 3-year grant towards core costs
Awards for All	For a digital inclusion project aimed at enabling MC members to use tablets during and between sessions
Arts Council England	Second instalment of a grant to support: weekly in-person music groups; the inclusion of digital/online activities; significant organisational development
Purey Cust Trust	For the resumption of Acomb Singers
Headley Trust	2nd instalment of a 2-year grant towards core costs
Postcode Neighbourhood	For the resumption of The Rolling Tones Community Choir
Shears Foundation	A grant towards core costs
Benenden Health Community Fund	For musician fees for Acomb Singers
Whitwam Family Charitable Foundation	A grant towards core costs
Utley Foundation	For a Coronation concert with members of York Medical Group's Tower Court Singers, plus other groups

	Balance b/fwd £	Income received £	Resources expended £	Transfer of funds £	Balance c/fwd £
Unrestricted	36,459	29,010	26,031	(5)	39,433
Brelms Trust CIO	1,445	5,000	2,587	-	3,858
Wharfedale Foundation	1,360	-	1,360	-	-
Hobson Charity	2,921	-	2,925	4	-
HDH Wills 1965 Charitable Trust	70	-	70	-	-
Ashley Family Foundation	1,570	-	1,570	-	-
Garfield Weston Foundation	7,459	10,000	7,394	-	10,065
Awards for All	3,230	-	3,231	1	-
Arts Council England	17,248	13,889	28,107	-	3,030
Purey Cust Trust	854	-	854	-	-
Headley Trust	2,792	5,000	4,875	-	2,917
Postcode Neighbourhood	4,797	-	4,797	-	-
Shears Foundation	-	10,000	-	-	10,000
Benenden Health Community Fund	-	1,950	-	-	1,950
Whitwam Family Charitable	-	-	-	-	-
Foundation	-	5,000	-	-	5,000
Utleby Foundation	-	1,000	-	-	1,000
<b>Total Restricted</b>	<b>43,746</b>	<b>51,839</b>	<b>57,770</b>	<b>5</b>	<b>37,820</b>
<b>Total Funds</b>	<b>80,205</b>	<b>80,849</b>	<b>83,801</b>	<b>-</b>	<b>77,253</b>

#### Transfer between funds

Funds have been transferred from unrestricted funds to various overspent restricted funds.


Approval of accounts for the year ended:

31st March 2023

The report and accounts were approved at a meeting of the  
Trustees held on:

17/8/23

Date



Signed for and on behalf of the trustees

17/8/23

Date

JO FARRINGTON

Print name

TREASURER /  
TRUSTEE

Position (e.g. Chair etc)

# **Musical Connections**

(Charity Number: 1165993)

## **Trustees Annual Report & Financial Statements**

**for the year ended**

**31st March 2023**

# **outsourc**e

Charity accounts preparation &  
independent examination service

# **Musical Connections**

(Charity Number: 1165993)

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# Trustees' Annual Report

From 1st April 2022

To: 31st March 2023

**Charity's full name** Musical Connections

**Registered Charity number** 1165993

## Objectives and activities

### Summary of the purposes of the charity set out in its governing document

Musical Connections' objects, as set out in the constitution, are as follows:

- To advance the wellbeing of vulnerable and socially isolated people
- To relieve isolation and social exclusion amongst vulnerable people
- To provide opportunities for vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

### Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts

This has been our first full year of indoor, in-person sessions since the outbreak of Covid-19. Over the course of 2022-23, our team of dedicated musicians, led by two project managers, has provided the following participatory music and related arts activities in a diverse range of venues:

- 4 music groups in City of York Council's sheltered housing schemes
- 1 in a private care home
- 3 singing groups in partnership with York Medical Group, taking place in community venues near their surgeries
- 2 community choirs

In addition to core sessions, members from across all of the groups have been involved in 47 intergenerational and community-based events, including:

- 26 intergenerational workshops, concerts, and projects, where group beneficiaries made music with children and young people from local schools and universities
- 21 community-based events involving group members singing at Age UK day clubs, carol-singing in local supermarkets and at local authority sheltered housing schemes, and performing in formal concerts with other choirs in traditional concert venues

We also delivered a 6-session summer project involving group members, which culminated in a city-centre fundraiser busking event.

Free transport was provided for anyone who needed it.

Our experiences during the Covid-19 lockdowns of 2020-21 highlighted the benefits of including digital and multimedia activities alongside our more traditional group work. In response, we have:

- Continued to create video recordings, including collaborations with intergenerational and community partners
- Included 11 art workshops for sheltered housing scheme group members
- Completed the second half of a 6-month tablet training programme aimed at enabling group members to use tablets during sessions, participate in online musical activities, and contribute to video recordings

The trustees consider that they have complied with their duties to have due regard to the public benefit published by the Charity Commission.

## Achievements and performance

### Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.

During the financial year 2022-23, we ran a total of 339 in-person weekly (and, in the case of one group, fortnightly) sessions and events involving 300 older, vulnerable, and isolated beneficiaries. We included a further 200 vulnerable older people in the aforementioned additional intergenerational and community-linked events.

By the end of March 2023, we had worked with over 500 vulnerable, older people, and 819 children and young people. 128 beneficiaries completed feedback questionnaires over two tracking phases in October 2022 and March 2023, with the following findings:

- 98% said going to their Musical Connections session improved their mood on the day (89% said greatly)
- 99% said going to their group helped them to feel happier and more positive about life (78% said greatly)
- 96% said that taking part improved their confidence (65% said greatly)
- 91% said their physical wellbeing was improved
- 97% said they felt greater satisfaction with their lives
- 95% said going to their group improved their alertness and activity levels
- 95% said that it gave them a sense of purpose and something to look forward to
- 95% said it enabled them to make increased contact with other people
- 92% said that they had made new friends through their group
- 98% said they considered themselves to be a valued member of the MC family (70% said greatly)
- 96% said their overall wellbeing was improved

We have been aided in our achievements by a total of 22 volunteers who have:

- Worked as 'music buddies' at weekly sessions, supporting group members and musicians
- Provided members with transport to sessions
- Stayed in phone contact between sessions with particularly vulnerable members

Excellent relationships with a number of project partners have also been instrumental to our success. City of York Council's Local Area Coordinators and NHS social prescribers have made regular referrals, and York Medical Group, Age UK York, OCAY (Older Citizens Advocacy York) and York Cares have continued to promote our work to potential beneficiaries. We also benefit from York CVS' voluntary sector support and are members of the Music for Healthy Lives Research and Practice Network steering group, an initiative led by the University of Leeds. Laura Castle, radio presenter and Musical Connections ambassador, has also been a strong advocate for our work throughout the year.

*More details on our achievements and the wider impact of our work may be found in our Annual Report.*

## Financial review

### Review of the charity's financial position at the end of the period

At the end of the 22/23 financial year, Musical Connections had received £80,849 and made payments of £83,801, leaving a deficit balance of £2,952 for the year. This balance can be split into unrestricted and restricted as follows: a £2,979 surplus in unrestricted funding versus a £5,931 deficit in restricted grant income. When these are added to the carried forward balance from 21/22 (£80,205), this leaves Musical Connections with a total balance of £77,253 at the end of the financial year, split into an unrestricted fund of £39,433 and £37,820 in restricted funds.

### Statement explaining the policy for holding reserves stating why they are held

At the end of 22/23, the amount of reserves held was £39.4k. The Reserves Policy states that the maximum reserves held should be £42.7k, which at present reflects 50% of the core operational costs of running the sessions and an additional 10% to go towards paying for professional services that may need to be employed to aid closure. The ratio of reserves to net annual operating costs was 51:49 at the end of the financial year.

### Amount of reserves held

£39,433 of unrestricted reserves.

### Reasons for holding zero reserves

N/A

### Funds materially in deficit

N/A

### Explanation of any uncertainties about the charity continuing as a going concern

N/A

**Structure, governance and management**

**Description of the charity's trusts** N/A

**Type of governing document** Constitution

**How the charity is constituted** Charitable Incorporated Organisation

**Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees** Clause 10.1 of our constitution states that 'apart from the first charity trustees', every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. Clause 10.2 states 'in selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective management of the CIO'.

**Reference and administration details**

**Charity's full name** Musical Connections

**Other names the charity is known** N/A

**Charity's principal address** PO Box 724  
York  
YO1 0HL

**Names of the trustees who manage the charity**

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Val Sutton	Chair		
Jo Farrington	Treasurer		
Chris Bartram			
Hazel Brown			
Richard Frost			
Fiona Chapman		From 12/7/22	

**Names and addresses of advisers (OPTIONAL)**

Type of adviser	Name	Address
<b>Independent Examiner</b>	Karen Wood ACMA,CGMA	Outsource Accountancy Services & Independent Examinations  Hiscox Building, Peasholme Green YO1 7PR
<b>Bankers</b>	Natwest Bank	

**Name of chief executive or names of senior staff members**  
N/A

**Declaration**

**The trustees declare that they have approved the Trustees Annual Report and Accounts**

**Signed on behalf of the charity's trustees**

**Signature** 

**Full Name** Joanne Maria Farrington  
**Position** Treasurer  
**Date** 17/8/23

## Independent examiner's report to the trustees of Musical Connections

I report on the accounts of: **Musical Connections**  
for the year ended: **31st March 2023** which are set out on pages 5 to 8.

### Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 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

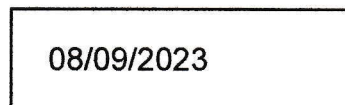
I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the Trust 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.



**Karen Wood (ACMA)**  
Outsource independent examination  
service  
The Hiscox Building  
Peasholme Green  
York YO1 7PR



**Date:**

**Musical Connections**  
(Charity Number: 1165993)

**Receipts & payments accounts for the year ending: 31st March 2023**

	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>2023 Total funds</b>	<b>2022 Total funds</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Receipts</b>				
Session fees & contributions	14,177	-	14,177	9,018
Grants	-	51,839	51,839	80,045
Donations from organisations	2,000	-	2,000	4,687
Donations from individuals	8,485	-	8,485	2,511
Community fundraising	4,348	-	4,348	4,513
<b>Total receipts</b>	<b>29,010</b>	<b>51,839</b>	<b>80,849</b>	<b>100,774</b>
<b>Payments</b>				
Session costs - musicians	5,840	24,855	30,695	17,596
Marketing & Website	676	435	1,111	1,278
Meeting costs	75	375	450	259
Transport costs	214	8,742	8,956	2,145
Session & event resources	1,437	229	1,666	5,941
Insurance	138	380	518	372
Project management costs	12,476	12,360	24,836	22,140
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Funding bids & fundraising	820	-	820	884
Training costs	915	630	1,545	1,786
Community involvement activities/volunteer management - musicians	1,669	5,729	7,398	16,753
Venue costs	613	3,688	4,301	1,722
Volunteer costs & DBS checks	12	-	12	144
Independent examination	300	-	300	300
Evaluation	150	150	300	
Covid self isolation payment	-	-	-	378
Miscellaneous expenses	-	-	-	131
<b>Total payments</b>	<b>26,031</b>	<b>57,770</b>	<b>83,801</b>	<b>72,914</b>
<b>Net of receipts/(payments)</b>	<b>2,979</b>	<b>(5,931)</b>	<b>(2,952)</b>	<b>27,860</b>
<b>Transfers between funds</b>	<b>(5)</b>	<b>5</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>36,459</b>	<b>43,746</b>	<b>80,205</b>	<b>52,345</b>
<b>Balance carried forward</b>	<b>39,433</b>	<b>37,820</b>	<b>77,253</b>	<b>80,205</b>

**Musical Connections**  
(Charity Number: 1165993)

**Statement of assets and liabilities at: 31st March 2023**

	Unrestricted funds	Restricted funds	2023 Total funds	2022 Total funds
	£	£	£	£
<b>Assets</b>				
Current bank account	39,324	37,820	77,144	80,061
Petty Cash	109	-	109	144
	<u>39,433</u>	<u>37,820</u>	<u>77,253</u>	<u>80,205</u>

Assets retained for charity's own use	Fund	Cost £	Current value £
<b>Details</b>			
45 x tablets	Awards for All	4,455	3,308

	Unrestricted funds	Restricted funds	2023 Total funds	2022 Total funds
	£	£	£	£
<b>Liabilities</b>				
Independent examination fee	350	-	350	300
	<u>350</u>	<u>-</u>	<u>350</u>	<u>300</u>

# Musical Connections

(Charity Number: 1165993)

Notes to the accounts for the year ended:

31st March 2023

## 1. Basis of accounts

The Trustees have taken advantage of section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

## 2. Restricted income funds

Where funds were originally granted for face to face work, funders kindly allowed their grants to be re-deployed to support Covid - response activities.

<b>Fund name</b>	<b>Purpose</b>
Brelms Trust CIO	3rd instalment of a 3-year grant to deliver music groups and intergenerational activities
Wharfedale Foundation	For intergenerational work ('Generations in Harmony')
Hobson Charity	For the provision of free beneficiary transport
HDH Wills 1965 Charitable Trust	For the venue hire for Honeysuckle Singers
Ashley Family Foundation	Second instalment of a 2-year grant for core costs
Garfield Weston Foundation	2nd instalment of a 3-year grant towards core costs
Awards for All	For a digital inclusion project aimed at enabling MC members to use tablets during and between sessions
Arts Council England	Second instalment of a grant to support: weekly in-person music groups; the inclusion of digital/online activities; significant organisational development
Purey Cust Trust	For the resumption of Acomb Singers
Headley Trust	2nd instalment of a 2-year grant towards core costs
Postcode Neighbourhood	For the resumption of The Rolling Tones Community Choir
Shears Foundation	A grant towards core costs
Benenden Health Community Fund	For musician fees for Acomb Singers
Whitwam Family Charitable Foundation	A grant towards core costs
Utleby Foundation	For a Coronation concert with members of York Medical Group's Tower Court Singers, plus other groups

	Balance b/fwd £	Income received £	Resources expended £	Transfer of funds £	Balance c/fwd £
Unrestricted	36,459	29,010	26,031	(5)	39,433
Brelms Trust CIO	1,445	5,000	2,587	-	3,858
Wharfedale Foundation	1,360	-	1,360	-	-
Hobson Charity	2,921	-	2,925	4	-
HDH Wills 1965 Charitable Trust	70	-	70	-	-
Ashley Family Foundation	1,570	-	1,570	-	-
Garfield Weston Foundation	7,459	10,000	7,394	-	10,065
Awards for All	3,230	-	3,231	1	-
Arts Council England	17,248	13,889	28,107	-	3,030
Purey Cust Trust	854	-	854	-	-
Headley Trust	2,792	5,000	4,875	-	2,917
Postcode Neighbourhood	4,797	-	4,797	-	-
Shears Foundation	-	10,000	-	-	10,000
Benenden Health Community Fund	-	1,950	-	-	1,950
Whitwam Family Charitable	-	-	-	-	-
Foundation	-	5,000	-	-	5,000
Utlely Foundation	-	1,000	-	-	1,000
<b>Total Restricted</b>	<b>43,746</b>	<b>51,839</b>	<b>57,770</b>	<b>5</b>	<b>37,820</b>
<b>Total Funds</b>	<b>80,205</b>	<b>80,849</b>	<b>83,801</b>	<b>-</b>	<b>77,253</b>

#### Transfer between funds

Funds have been transferred from unrestricted funds to various overspent restricted funds.

Approval of accounts for the year ended:

31st March 2023

The report and accounts were approved at a meeting of the  
Trustees held on:

17/8/23

Date



Signed for and on behalf of the trustees

17/8/23

Date

JO FARRINGTON

Print name

TREASURER /  
TRUSTEE

Position (e.g. Chair etc)

# **Musical Connections**

(Charity Number: 1165993)

## **Trustees Annual Report & Financial Statements**

**for the year ended**

**31st March 2023**

# **outsourc**e

Charity accounts preparation &  
independent examination service

# **Musical Connections**

(Charity Number: 1165993)

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# Trustees' Annual Report

From 1st April 2022

To: 31st March 2023

**Charity's full name** Musical Connections

**Registered Charity number** 1165993

## Objectives and activities

### Summary of the purposes of the charity set out in its governing document

Musical Connections' objects, as set out in the constitution, are as follows:

- To advance the wellbeing of vulnerable and socially isolated people
- To relieve isolation and social exclusion amongst vulnerable people
- To provide opportunities for vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

### Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts

This has been our first full year of indoor, in-person sessions since the outbreak of Covid-19. Over the course of 2022-23, our team of dedicated musicians, led by two project managers, has provided the following participatory music and related arts activities in a diverse range of venues:

- 4 music groups in City of York Council's sheltered housing schemes
- 1 in a private care home
- 3 singing groups in partnership with York Medical Group, taking place in community venues near their surgeries
- 2 community choirs

In addition to core sessions, members from across all of the groups have been involved in 47 intergenerational and community-based events, including:

- 26 intergenerational workshops, concerts, and projects, where group beneficiaries made music with children and young people from local schools and universities
- 21 community-based events involving group members singing at Age UK day clubs, carol-singing in local supermarkets and at local authority sheltered housing schemes, and performing in formal concerts with other choirs in traditional concert venues

We also delivered a 6-session summer project involving group members, which culminated in a city-centre fundraiser busking event.

Free transport was provided for anyone who needed it.

Our experiences during the Covid-19 lockdowns of 2020-21 highlighted the benefits of including digital and multimedia activities alongside our more traditional group work. In response, we have:

- Continued to create video recordings, including collaborations with intergenerational and community partners
- Included 11 art workshops for sheltered housing scheme group members
- Completed the second half of a 6-month tablet training programme aimed at enabling group members to use tablets during sessions, participate in online musical activities, and contribute to video recordings

The trustees consider that they have complied with their duties to have due regard to the public benefit published by the Charity Commission.

## Achievements and performance

### Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.

During the financial year 2022-23, we ran a total of 339 in-person weekly (and, in the case of one group, fortnightly) sessions and events involving 300 older, vulnerable, and isolated beneficiaries. We included a further 200 vulnerable older people in the aforementioned additional intergenerational and community-linked events.

By the end of March 2023, we had worked with over 500 vulnerable, older people, and 819 children and young people. 128 beneficiaries completed feedback questionnaires over two tracking phases in October 2022 and March 2023, with the following findings:

- 98% said going to their Musical Connections session improved their mood on the day (89% said greatly)
- 99% said going to their group helped them to feel happier and more positive about life (78% said greatly)
- 96% said that taking part improved their confidence (65% said greatly)
- 91% said their physical wellbeing was improved
- 97% said they felt greater satisfaction with their lives
- 95% said going to their group improved their alertness and activity levels
- 95% said that it gave them a sense of purpose and something to look forward to
- 95% said it enabled them to make increased contact with other people
- 92% said that they had made new friends through their group
- 98% said they considered themselves to be a valued member of the MC family (70% said greatly)
- 96% said their overall wellbeing was improved

We have been aided in our achievements by a total of 22 volunteers who have:

- Worked as 'music buddies' at weekly sessions, supporting group members and musicians
- Provided members with transport to sessions
- Stayed in phone contact between sessions with particularly vulnerable members

Excellent relationships with a number of project partners have also been instrumental to our success. City of York Council's Local Area Coordinators and NHS social prescribers have made regular referrals, and York Medical Group, Age UK York, OCAY (Older Citizens Advocacy York) and York Cares have continued to promote our work to potential beneficiaries. We also benefit from York CVS' voluntary sector support and are members of the Music for Healthy Lives Research and Practice Network steering group, an initiative led by the University of Leeds. Laura Castle, radio presenter and Musical Connections ambassador, has also been a strong advocate for our work throughout the year.

*More details on our achievements and the wider impact of our work may be found in our Annual Report.*

## Financial review

### Review of the charity's financial position at the end of the period

At the end of the 22/23 financial year, Musical Connections had received £80,849 and made payments of £83,801, leaving a deficit balance of £2,952 for the year. This balance can be split into unrestricted and restricted as follows: a £2,979 surplus in unrestricted funding versus a £5,931 deficit in restricted grant income. When these are added to the carried forward balance from 21/22 (£80,205), this leaves Musical Connections with a total balance of £77,253 at the end of the financial year, split into an unrestricted fund of £39,433 and £37,820 in restricted funds.

### Statement explaining the policy for holding reserves stating why they are held

At the end of 22/23, the amount of reserves held was £39.4k. The Reserves Policy states that the maximum reserves held should be £42.7k, which at present reflects 50% of the core operational costs of running the sessions and an additional 10% to go towards paying for professional services that may need to be employed to aid closure. The ratio of reserves to net annual operating costs was 51:49 at the end of the financial year.

### Amount of reserves held

£39,433 of unrestricted reserves.

### Reasons for holding zero reserves

N/A

### Funds materially in deficit

N/A

### Explanation of any uncertainties about the charity continuing as a going concern

N/A

**Structure, governance and management**

**Description of the charity's trusts** N/A

**Type of governing document** Constitution

**How the charity is constituted** Charitable Incorporated Organisation

**Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees** Clause 10.1 of our constitution states that 'apart from the first charity trustees', every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. Clause 10.2 states 'in selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective management of the CIO'.

**Reference and administration details**

**Charity's full name** Musical Connections

**Other names the charity is known** N/A

**Charity's principal address** PO Box 724  
York  
YO1 0HL

**Names of the trustees who manage the charity**

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Val Sutton	Chair		
Jo Farrington	Treasurer		
Chris Bartram			
Hazel Brown			
Richard Frost			
Fiona Chapman		From 12/7/22	

**Names and addresses of advisers (OPTIONAL)**

Type of adviser	Name	Address
<b>Independent Examiner</b>	Karen Wood ACMA,CGMA	Outsource Accountancy Services & Independent Examinations  Hiscox Building, Peasholme Green YO1 7PR
<b>Bankers</b>	Natwest Bank	

**Name of chief executive or names of senior staff members**  
N/A

**Declaration**

**The trustees declare that they have approved the Trustees Annual Report and Accounts**

**Signed on behalf of the charity's trustees**

**Signature**  


**Full Name** Joanne Maria Farrington  
**Position** Treasurer  
**Date** 17/8/23

## Independent examiner's report to the trustees of Musical Connections

I report on the accounts of: **Musical Connections**  
for the year ended: **31st March 2023** which are set out on pages 5 to 8.

### Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 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

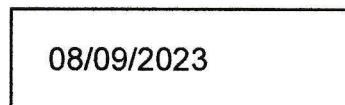
I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the Trust 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.



**Karen Wood (ACMA)**  
Outsource independent examination  
service  
The Hiscox Building  
Peasholme Green  
York YO1 7PR



**Date:**

**Musical Connections**  
(Charity Number: 1165993)

**Receipts & payments accounts for the year ending: 31st March 2023**

	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>2023 Total funds</b>	<b>2022 Total funds</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Receipts</b>				
Session fees & contributions	14,177	-	14,177	9,018
Grants	-	51,839	51,839	80,045
Donations from organisations	2,000	-	2,000	4,687
Donations from individuals	8,485	-	8,485	2,511
Community fundraising	4,348	-	4,348	4,513
<b>Total receipts</b>	<b>29,010</b>	<b>51,839</b>	<b>80,849</b>	<b>100,774</b>
<b>Payments</b>				
Session costs - musicians	5,840	24,855	30,695	17,596
Marketing & Website	676	435	1,111	1,278
Meeting costs	75	375	450	259
Transport costs	214	8,742	8,956	2,145
Session & event resources	1,437	229	1,666	5,941
Insurance	138	380	518	372
Project management costs	12,476	12,360	24,836	22,140
Administration & office costs	696	197	893	1,085
Funding bids & fundraising	820	-	820	884
Training costs	915	630	1,545	1,786
Community involvement activities/volunteer management - musicians	1,669	5,729	7,398	16,753
Venue costs	613	3,688	4,301	1,722
Volunteer costs & DBS checks	12	-	12	144
Independent examination	300	-	300	300
Evaluation	150	150	300	
Covid self isolation payment	-	-	-	378
Miscellaneous expenses	-	-	-	131
<b>Total payments</b>	<b>26,031</b>	<b>57,770</b>	<b>83,801</b>	<b>72,914</b>
<b>Net of receipts/(payments)</b>	<b>2,979</b>	<b>(5,931)</b>	<b>(2,952)</b>	<b>27,860</b>
<b>Transfers between funds</b>	<b>(5)</b>	<b>5</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>36,459</b>	<b>43,746</b>	<b>80,205</b>	<b>52,345</b>
<b>Balance carried forward</b>	<b>39,433</b>	<b>37,820</b>	<b>77,253</b>	<b>80,205</b>

**Musical Connections**  
(Charity Number: 1165993)

**Statement of assets and liabilities at: 31st March 2023**

	Unrestricted funds	Restricted funds	2023 Total funds	2022 Total funds
	£	£	£	£
<b>Assets</b>				
Current bank account	39,324	37,820	77,144	80,061
Petty Cash	109	-	109	144
	<u>39,433</u>	<u>37,820</u>	<u>77,253</u>	<u>80,205</u>

Assets retained for charity's own use	Fund	Cost £	Current value £
<b>Details</b>			
45 x tablets	Awards for All	4,455	3,308

	Unrestricted funds	Restricted funds	2023 Total funds	2022 Total funds
	£	£	£	£
<b>Liabilities</b>				
Independent examination fee	350	-	350	300
	<u>350</u>	<u>-</u>	<u>350</u>	<u>300</u>

# Musical Connections

(Charity Number: 1165993)

Notes to the accounts for the year ended:

31st March 2023

## 1. Basis of accounts

The Trustees have taken advantage of section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

## 2. Restricted income funds

Where funds were originally granted for face to face work, funders kindly allowed their grants to be re-deployed to support Covid - response activities.

<b>Fund name</b>	<b>Purpose</b>
Brelms Trust CIO	3rd instalment of a 3-year grant to deliver music groups and intergenerational activities
Wharfedale Foundation	For intergenerational work ('Generations in Harmony')
Hobson Charity	For the provision of free beneficiary transport
HDH Wills 1965 Charitable Trust	For the venue hire for Honeysuckle Singers
Ashley Family Foundation	Second instalment of a 2-year grant for core costs
Garfield Weston Foundation	2nd instalment of a 3-year grant towards core costs
Awards for All	For a digital inclusion project aimed at enabling MC members to use tablets during and between sessions
Arts Council England	Second instalment of a grant to support: weekly in-person music groups; the inclusion of digital/online activities; significant organisational development
Purey Cust Trust	For the resumption of Acomb Singers
Headley Trust	2nd instalment of a 2-year grant towards core costs
Postcode Neighbourhood	For the resumption of The Rolling Tones Community Choir
Shears Foundation	A grant towards core costs
Benenden Health Community Fund	For musician fees for Acomb Singers
Whitwam Family Charitable Foundation	A grant towards core costs
Utleby Foundation	For a Coronation concert with members of York Medical Group's Tower Court Singers, plus other groups

	Balance b/fwd £	Income received £	Resources expended £	Transfer of funds £	Balance c/fwd £
Unrestricted	36,459	29,010	26,031	(5)	39,433
Brelms Trust CIO	1,445	5,000	2,587	-	3,858
Wharfedale Foundation	1,360	-	1,360	-	-
Hobson Charity	2,921	-	2,925	4	-
HDH Wills 1965 Charitable Trust	70	-	70	-	-
Ashley Family Foundation	1,570	-	1,570	-	-
Garfield Weston Foundation	7,459	10,000	7,394	-	10,065
Awards for All	3,230	-	3,231	1	-
Arts Council England	17,248	13,889	28,107	-	3,030
Purey Cust Trust	854	-	854	-	-
Headley Trust	2,792	5,000	4,875	-	2,917
Postcode Neighbourhood	4,797	-	4,797	-	-
Shears Foundation	-	10,000	-	-	10,000
Benenden Health Community Fund	-	1,950	-	-	1,950
Whitwam Family Charitable	-	-	-	-	-
Foundation	-	5,000	-	-	5,000
Utlely Foundation	-	1,000	-	-	1,000
<b>Total Restricted</b>	<b>43,746</b>	<b>51,839</b>	<b>57,770</b>	<b>5</b>	<b>37,820</b>
<b>Total Funds</b>	<b>80,205</b>	<b>80,849</b>	<b>83,801</b>	<b>-</b>	<b>77,253</b>

#### Transfer between funds

Funds have been transferred from unrestricted funds to various overspent restricted funds.

Approval of accounts for the year ended:

31st March 2023

The report and accounts were approved at a meeting of the  
Trustees held on:

17/8/23

Date



Signed for and on behalf of the trustees

17/8/23

Date

JO FARRINGTON

Print name

TREASURER /  
TRUSTEE

Position (e.g. Chair etc)

**MUSICAL CONNECTIONS**

England & Wales - Charity number 1165993

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# Accounts

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# Report of the Trustees and Unaudited Financial Statements

31<sup>st</sup> March 2022

Reg. Charity No: 1165993

T: 01904 373011

E: [enquiries@musicalconnections.org.uk](mailto:enquiries@musicalconnections.org.uk)

W: [www.musicalconnections.org.uk](http://www.musicalconnections.org.uk)



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## ORGANISATIONAL DETAILS

**Type of Charity:** Musical Connections is a CIO (a Charitable Incorporated Organisation).

**Charity Registration Number:** 1165993

**Date of Registration:** 10<sup>th</sup> March 2016

**Postal Address:** PO Box 724, York, YO1 0HL

**Trustees:**

- Valerie Sutton (Chair)
- Jo Farrington (Treasurer)
- Chris Bartram
- Hazel Brown
- Richard Frost

**Bank:**

- NatWest
- City Centre Branch
- 1 Market Street
- York YO1 8SR

**Accountants:**

- Outsource
- 29 Millfield Road
- York, YO23 1NH

Over the last year, our project team has consisted of a Project Director, who is also a musician, and 3 more self-employed musicians, supported by an active Board of Trustees.

# GOVERNANCE

## **Election of Charity Trustees**

Clause 10.1 of our constitution states that ‘apart from the first charity trustees, every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees’. Clause 10.2 states: ‘In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO’.

## **Additional Governance Information and Organisational Structure**

Musical Connections’ board of trustees is stable, experienced, and very active, bringing together a range of skills and expertise. Our Chair was previously Group Manager of Adult Services for City of York Council, and brings extensive experience in managing and delivering care for older people. She is ably supported by the rest of the trustee board, which includes a retired GP, a former marketing manager, a former senior music lecturer from York St John University and a retired chartered engineer, who is also one of our choir members, enriching the board with his experience as a project beneficiary. Together the board is well equipped to provide oversight and guidance for the project.

Our Project Director/Lead Musician has led the Musical Connections project since its inception and has over 15 years’ experience of leading participatory music in care and community settings. She leads a small team of self-employed musicians who are highly trained and experienced in working with vulnerable older people who have a range of needs, interests and abilities.

As our work has gradually returned to near-normal this year, the team has built on the wealth of experience, skills and ideas they acquired during the pandemic, enabling us to resume face-to-face work quickly and effectively, and to deliver a project that, while very similar to our pre-Covid work, has become more multi-faceted, perhaps most noticeably in relation to digital activity and the strong sense of connection – ‘family’ – that now exists across the different groups and choirs that make up our project.

## **Risk Management**

The Board of Trustees considers that they have complied with their duties to have due regard to the public benefit guidance published by the Charity Commission, and work collectively to review risks, systems, and procedures on a regular basis. One of our trustees has particular responsibility for Health and Safety and our Chair is the named person responsible for safeguarding.

# BACKGROUND AND OBJECTIVES

## Background

Following a year which turned the world upside down, and the work of Musical Connections with it, we emerged from the long winter lockdown of early 2021 with cautious optimism that a return to some degree of normality would become possible during the year ahead. With this aim in mind, we took advantage of every change in the rules to advance towards an eventual return to indoor, in-person groups.

Between April and September 2021, we ran a hybrid service, which involved bringing group members together outdoors where possible, while also staying in telephone, postal and email contact with people who were too vulnerable to be in contact with others, or who were living in residential care settings where strict restrictions persisted.

On the 6<sup>th</sup> September, we eventually moved back indoors, gradually resuming our core group work across a range of care and community settings, while also incorporating new skills, ideas and activities developed during the pandemic. Although the emergence of the Omicron variant proved an unwelcome bump in the road, the worst of it coincided fortuitously with a planned break in sessions over Christmas, which meant there was minimum disruption to our activities – wherever possible, we simply moved our pre-Christmas carolling and events outdoors. After Christmas, City of York Council guidance allowed us to resume indoor sessions and, in February, we moved back into a care-home, which had been closed to the general public for almost 2 years. At the same time, we expanded our project by beginning a new group in a sheltered housing scheme where we had not previously worked.

## Objectives

Funders continued to be fully supportive of our strategy, which enabled us to keep delivering on our charity's objectives i.e.:

- To advance the wellbeing of vulnerable and socially isolated older people
- To relieve isolation and social exclusion amongst vulnerable people

- To provide opportunities to vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

# ACTIVITIES DELIVERED AND BENEFICIARY NUMBERS

## Main Activities Delivered

Over the course of the year, the following activities were delivered by our team of dedicated musicians, all of whom were closely supervised by the Project Director:

### 1. In-Person Group Work

- On 12<sup>th</sup> April, when we were allowed to meet in groups of 6, our musicians went out 'on the road', as they had done during the lockdowns of the previous 12 months, but this time, instead of just visiting one person at a time, they arranged for 3 or 4 people to sing together in gardens and public spaces. This was the first time in over a year that these individuals had seen other members of their Musical Connections group/choir in person.
- On 21<sup>st</sup> May, when up to 30 were allowed to meet in groups outside, we began running 3 weekly sessions in outdoor community venues. Beneficiaries from across the project sang together in different York locations – a church garden, a community centre sports pitch, and a garden attached to one of York Medical Group's GP surgeries. Please follow the link for a short video based in the surgery garden: <https://youtu.be/mEKkdYFY32s>. This was hugely exciting for everyone involved, although some of our most vulnerable members felt unable to cope with the unpredictable weather and uneven garden terrain, and so continued to stay in touch from a distance while awaiting the return to indoor sessions.
- We live-streamed several of the above sessions for people with online access to watch from home.
- On 6<sup>th</sup> September, with permission from City of York Council, we were finally able to resume 3 sheltered housing scheme groups indoors, and reinstated an additional 4 groups in community venues.
- Between November 2021 and February 2022, a further three music groups commenced.

As a result of these efforts, by the end of March 2022, we were running the following 10 weekly groups:

- 4 in City of York Council's sheltered housing schemes
- 1 in a private care-home
- 3 in partnership with York Medical Group (as we were no longer able to run these groups in YMG surgeries, we found alternative venues for them in the wider community)
- 2 community choirs

In addition to the core sessions, members from across all of the groups took part in a number of additional activities in the wider community, some of which were intergenerational.

Free transport was provided for anyone who needed it, to enable them to attend both weekly sessions, and additional community-based events.

## **2. Digital Inclusion Activities**

While it was highly gratifying that we were able to return to such a high volume of face-to-face work over the course of the year, our experience of working under lockdown had opened our eyes to the possibilities presented by including digital activities alongside traditional group work. It was clear that members with online access enjoyed taking part in collaborative recordings with students and members of other Musical Connections groups, and we had seen how much they enjoyed accessing Musical Connections material in their own homes. We therefore:

- Continued to create video recordings, including collaborations with our intergenerational partners
- Secured funding from the National Lottery's Awards for All programme to purchase a stock of tablets for use by members, and to run a 6-month training programme aimed at enabling them to participate in recordings and online activities, and to access a bank of Musical Connections online material (see below for more detail on the progress of this project to date)

## **3. Intergenerational Sessions and Events**

During the lockdowns, we managed to stay in touch with several intergenerational partners, which meant that local schoolchildren and students were able to participate in online sessions, virtual concerts, and collaborative recordings – something which was extremely rewarding for

everyone involved whilst other options for social connection and music-making were so limited. However, as with all of our other work, there has been a strong desire to bring younger and older people together in person and so, gradually, and cautiously, we have instigated an increasing amount of face-to-face intergenerational work. By the end of March 2022, we had managed to run 10 face-to-face intergenerational sessions/events, and had included 253 children and young people across our in-person and online activities.

#### 4. Radio Sessions

Our musicians have nurtured strong relationships with two local radio stations, YorkMix and YO1 Radio, which have enabled us to enjoy a strong radio presence across the city. Both stations have promoted the work of Musical Connections to their listeners, and YO1 Radio have invited group members to perform in the studio on a number of occasions. The station also created a feature about Musical Connections, which involved them visiting and broadcasting the work of our sheltered housing groups.



We are delighted that Laura Castle from YorkMix has recently accepted the role of 'Musical Connections ambassador'.

*'What the team do at Musical Connections is amazing. Music is universal and to be able to bring people together through this medium and create true happiness and positivity are just some of the many reasons I feel so privileged to be an ambassador. I've been lucky enough*

*to witness first-hand the joy that the sessions bring to the lives of those involved, and the more people that can hear about and get on board with the charity, the better'*

## 2021/22 AT A GLANCE

Over the course of the year, the number of beneficiaries actively engaging in face-to-face work increased from **less than 20** in April 2021 to **213** by the end of March 2022, plus 60 additional vulnerable older people who took part in additional, one-off events in the wider community. We also continued to support **18** members with regular phone calls between sessions – some had been unable to return to their group/choir because of increasing frailty, while others, despite coming back to sessions, had got used to their phone calls and didn't want to lose contact with the volunteers who were ringing them.

In addition, **253** children and young people from local schools and universities took part in intergenerational activities with members.



**35**  
outdoor sessions  
including  
'MC on the Road'  
which included  
70 beneficiaries



**219**  
indoor in-person  
sessions and  
events  
delivered

**253**  
children and  
young people  
included within  
the project



**10**  
face-to-face  
intergenerational  
sessions  
organised



**273**  
older, vulnerable  
and isolated  
people reached  
in sessions



**2,200+**  
attendances  
registered  
across the  
whole project

## IMPACT ON PARTICIPANT WELLBEING

Feedback from beneficiaries suggests that the work we have done to support them through another difficult year has had a significant positive impact on their wellbeing, helping to reduce the effects of prolonged restrictions and enabling them to re-connect with their community as restrictions have gradually eased.

During two tracking phases (October 2021 and March 2022), **111 beneficiaries** completed feedback questionnaires.



**99%** said that going to their MC group improves their overall mood that day and **94%** said that it greatly improves it:

*'I felt a bit under the weather on Wednesday morning but after one and a half hours with delightful Abby and the rest of the members, I danced out of the hall! Not quite literally, but I really felt so much better after that lovely session.'*

*'We are a very happy group. If you're a bit fed up when you come in, you won't be when you go out! Amy is a joy to be with.'*

*'The best feeling ever is when it all comes together, we get it right and the sound is great!'*

**100%** said that weekly sessions make them feel generally **happier and more positive about life** (**84%** said that they **greatly improve their happiness**):



*'Even when I don't feel like going, it's a great boost to my day – very positive'*

*'I wish I could do it every day because all my troubles seem smaller after choir'*

*'MC has been a hugely positive impact on my life, for which I am very grateful. The consistent enthusiasm and cheerfulness of the musicians is such a lift from daily news and a reminder to engage with others as a distraction. I ALWAYS enjoying coming to MC'*

**95%** said that participating in their MC group **improves their confidence/self-esteem** (**60%** said greatly):

*'I used to be a very quiet shy person but singing and theatre has brought me out of my shell.'*

*'Fiona and Charlotte both teach in a positive manner, which makes a great difference to how the choir responds - everyone feels confident'*

*'Normally I'm fairly quiet but here I can let my hair down like the rest of the gang.'*



*'I'm not very self-confident, but as I've got to know people, it's helped me to feel better about myself and speak up'*

**98%** said that their MC sessions help them to feel **more alert and active**:

*'I'm going down a little rabbit hole with my memory, but sessions do make me feel better'*

*'A fabulous, lively start to the week and a great wake-up after the weekend!'*

*'I love the dancing/body percussion as part of the warm-up. Also, the present fundraiser to 'Walk 500 Miles' is an excellent way of improving physical well-being'*



**98%** said that participating in the sessions gives them a **sense of purpose and something to look forward to:**

*'I was sitting at home doing nothing and now I'm blossoming'*

*'I think it's great. I get a lot of buzz out of it and look forward to it every Monday. I just love it. Best thing I do is come to this group.'*

*'Look forward to Tuesday mornings, it's good to sing and meet other people whom I wouldn't normally have contact with - just an enjoyable couple of hours.'*



**95%** said that participating in MC events and sessions gives them an **opportunity to make increased contact with other people/the wider community**. For many, it is the only regular social and creative activity available to them:

*'It is just a joy to be a part of it and to have met such special people, not only the team but many of the others who are connected to it.'*

*'I just want to thank everyone in the music group - they are all my good friends'*

*'MC has been a major contribution to my ability to deal with Covid-19 and all the lockdown problems during the last eighteen months. I would have found it more of struggle without this community'*



**96%** said that they have **made new friends** since joining the group:



*'I enjoy coming and meeting people - making friends out of strangers!'*

*'It's lovely to have an extra circle of friends'*

*'I've made some lovely friends and always feel uplifted after the sessions'*

**99%** said that going to their MC group **improves their overall life satisfaction** and **55%** said it **improves greatly**. Weekly sessions and additional events in the wider community appear to give people who are struggling with loneliness something positive to think about and to draw upon during difficult times:

*'I leave with a feeling of satisfaction knowing that I have perhaps increased my life for another day and dread a time when I can no longer join'*

*'It's been the best decision I've made this year'*

*'Just so vital that this marvellous small team keeps*



*going with what they are doing. So marvellously committed to each session and such a pleasure to hear such lovely singing voices being expressed with joy, enthusiasm, and love for the moment that we are all in. And they carry us along with them, which is always the miracle that is achieved at these Musical Connections sessions!*

**95%** said that MC sessions improve their **overall wellbeing** and **62%** said **greatly**.

*'Always go home with a smile on your face'*

*'We always have such a lot of fun and lots of laughs.  
Always come out cheerful and happy'*

*'I know it will be fun and full of laughter'*

*'It always lifts my spirits – I come away with a smile on my face'*



**89%** believe that participating in sessions **improves their physical health**. The focus and concentration needed to engage fully in session activities helps reduce rumination, anxiety, and stress, giving people a sense of clarity and helping them to feel calmer and more centred:

*'The songs with movement have got to be beneficial for our old bones!'*



*'It helps massively with my health, it helps me to breathe easier, and mentally it goes a long way to help me to enjoy what I have.'*

*'I get so much from attending the three Musical Connection groups. They have helped me so much through some very difficult times health-wise that I dread to think what I would do if they didn't exist'*

*'With COPD and other medical conditions, singing helps with my breathing'*

The work that we did throughout the coronavirus lockdowns had the effect of making our musical community stronger and closer than it was before, with many members now referring affectionately to 'Our Musical Family'. **100%** said that they continue to **feel a valued member of the MC family** and **60%** said **greatly**.

*'I am referred to by my name which makes me feel valued, and Fiona and Charlotte have a lot of names to remember! They always have a warm welcome and a smile.'*

*'It's like once seen - never forgotten'*

*'We are all made to feel so special by every one of you in the team'*



## Social Prescribing

Social prescribing is becoming increasingly accepted as a way of providing patients with legitimate non-medical solutions to their problems, and York Medical Group (YMG) is keen to bring the benefits cited above to their patients. We have worked with YMG for over 4 years as a social prescribing partner and, prior to Covid, were running singing groups in two of their GP surgeries. No longer able to base ourselves in their surgeries, we have found alternative venues for these groups in the wider community - YMG is covering the rental costs for us. In November, we set



up a third YMG-supported group, which is now based on campus at York St John University. Our aim is to create an intergenerational choir involving York St John students, YMG patients and other older members of the wider York community – so far, 17 older people and 3 students have participated in the group, and we continue to work on building numbers.

## DIGITAL ACTIVITIES

The pandemic illuminated the technology gap between ‘the haves’ and ‘the have nots’, with the benefits of technology never previously so apparent to our beneficiaries. During the lockdowns, those with internet access were able to participate in our large range of online



activities, while those without access felt particularly isolated and left behind, despite having telephone and postal contact with us. We tried to address this problem by borrowing tablets from another local charity and running a small pilot project in a couple of the council’s sheltered housing schemes. However, the lack of resources available within the scheme to support novice

users meant that little progress was made. With this in mind, we made a successful application to the National Lottery’s Awards for All grant programme, which enabled us to purchase tablets for members of three of our groups and provide them with appropriate training in how to use the tablets to access Musical Connections resources and to connect with friends from their group between sessions.

Based on feedback from the pilot project, we developed 2 consecutive 12-week training programmes which aimed to ensure that tablet users experienced genuine benefits from having digital access. The first of these programmes took place between January and March 2022, during which we handed out 18 tablets across 2 of our groups (one community-based and one sheltered housing scheme). Given that most members had never used a tablet before, we originally planned to focus on tablet functionality before introducing Wi-Fi access, however, in practice, it was easier to do both concurrently. After connecting them to the internet via personal hotspots and City of York Council Wi-Fi, a couple of volunteer ‘tech-buddies’ assisted the groups’ musicians in helping members to browse the internet, take pictures, and record parts of



the weekly sessions – this content was then uploaded to two shared Google Drives, ‘TC family’ and ‘Gale Farm family’, which could be accessed by members at any time. Both Google Drives also included song lyrics used during the weekly sessions, MC group recordings and a regularly updated ‘group chat’ using Google Docs. In addition, some members used their newfound digital skills to discover family history, look up contact details for paying bills and catch up with their favourite television shows.

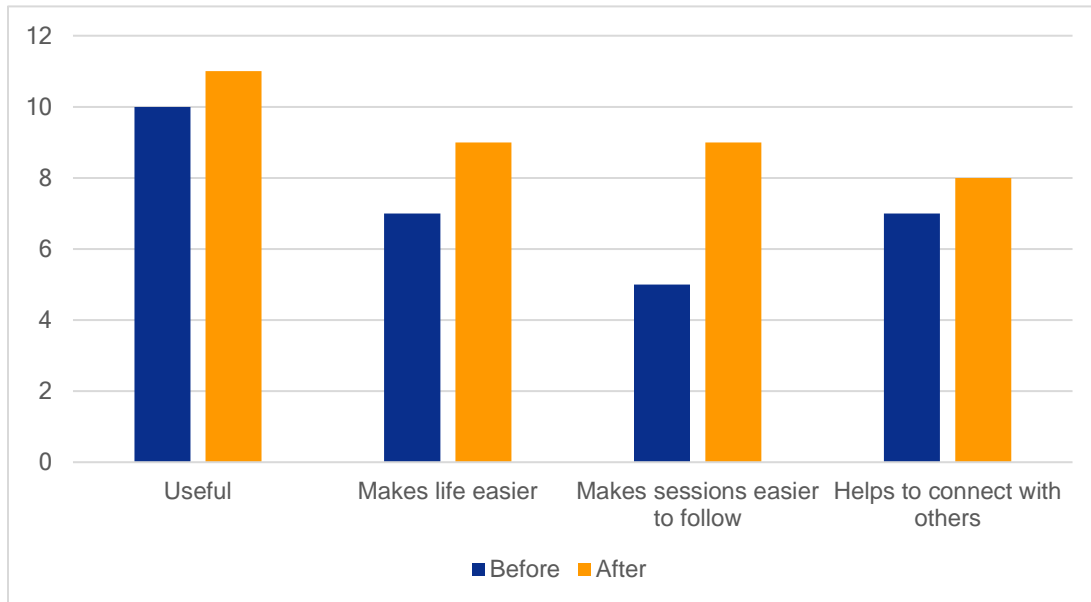
*‘I’ve been using it on and off at home - I took a picture of Susie (the cat) yesterday, and Caroline (her carer) took a couple of me with her. I’ve got some of Charlene (another carer) too. Caroline has been helping me at home with it, and I’ve been finding Musical Connections songs on the internet, and also my own as well. I’ve found YouTube and things on there...my next thing is to try and do a video call.’*

Of the 18 beneficiaries who were given tablets in January, all of the community-based group members (9) were keen to utilise them during sessions, but 5 of the sheltered housing scheme group members either returned their tablet soon after the programme began or refused to take one in the first place. 3 had tablets of their own at home, 1 felt they did not understand the digital world and were unwilling to learn and 1 had a visual impairment which prevented them from using a tablet effectively. 2 group members also missed the majority of Stage 1 due to health-related issues; 1 was in hospital and 1 was struggling with the after-effects of Covid-19. Despite this, the remaining 2 sheltered housing scheme group members learnt quickly and are now confidently using the tablet, both at home and during sessions.

*‘I find it useful for watching shows because I can’t get Coronation Street and Emmerdale on my television. I’ve been using it to take photographs too, and then I can show them to my neighbour – show her the things we’ve been doing in the sessions’*

*‘I’ve enjoyed it – at first I was just interested in looking up the York news, but now I’ve found that I can watch things on YouTube and that’s really good – I like to be informed about things and this is helping’*

**11 beneficiaries** across the two groups completed entry and exit questionnaires. This enabled us to compare their initial perceptions of the digital world with their experience having accessed it and it was gratifying to see that the number of people perceiving the benefits of tablet usage had increased by the end of the first training programme.



Of the **11 beneficiaries** who used a tablet throughout the programme:

- **ALL** enjoyed **learning to do so** (5 said **greatly**)
- **ALL** felt that they had **made progress** using the tablet (6 felt it was **significant progress**)
- **10** felt **confident using it** (3 said **very**)
- **10** are now **using the tablet regularly during sessions** to access lyrics and songs

One member has found the tablet so beneficial, both during weekly sessions and at home, that she has bought herself a tablet and had broadband installed at home.

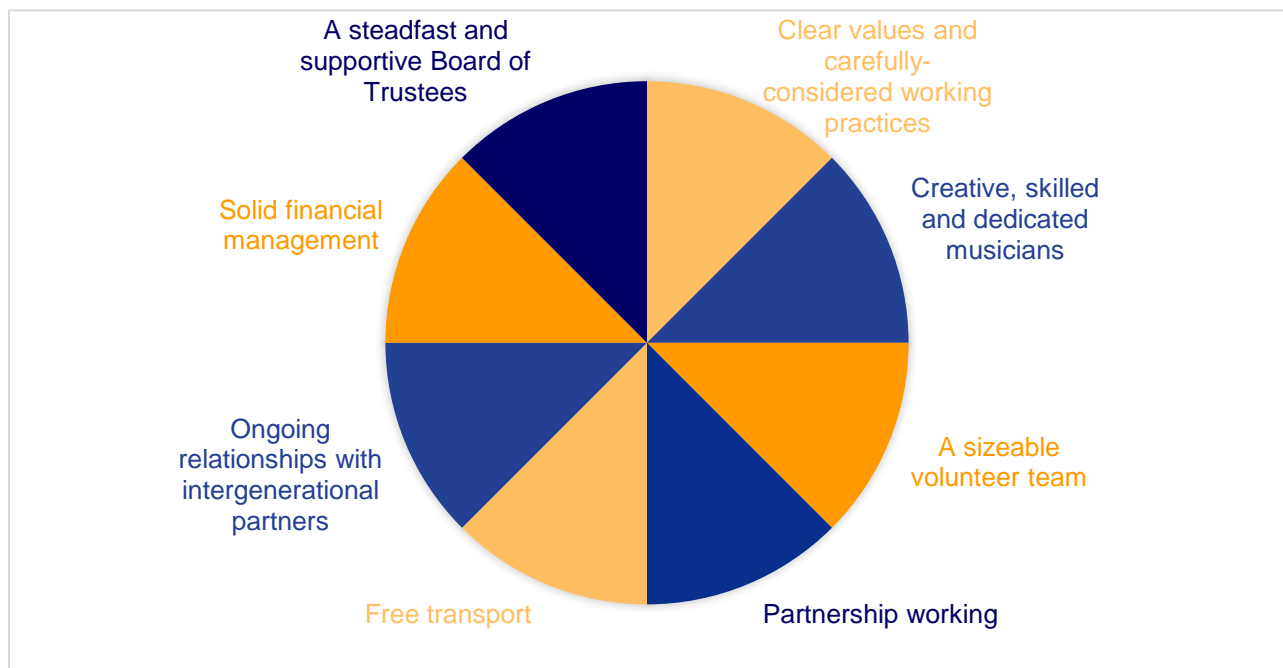
*'It's made me buy one, so it's definitely done something! I've just got the internet too, so it's made me do that – I do find it useful'*

Building on learning and member experience during Stage 1, we will shortly be rolling out the tablet training to a third group (in a sheltered housing scheme) for another 12-week period and will also continue supporting members in the original two groups. We hope that this will

provide maximum opportunity for our members to engage with each other, access online creative opportunities, and connect with the wider world.

# MUSICAL CONNECTIONS' MAGIC INGREDIENTS

Over the 13 years that Musical Connections has been running, including throughout the coronavirus pandemic, we have seen how the following ingredients have combined to create a formula which has enabled us to consistently deliver a creative, high-quality, and adaptable project which has become greatly valued in York, both by its beneficiaries and by the wider community.



## IN MORE DEPTH:

### Clear Values and Carefully Considered Working Practices

The following characteristics are cornerstones of our work, which have remained constant through the challenges of the pandemic:

**Continuity:** in pre-Covid times, our commitment to providing a continuous programme of weekly sessions (structured loosely round the academic timetable) enabled participants to build self-confidence and to develop meaningful relationships with other members of the

Musical Connections family. Our determination to maintain these relationships and to provide a continuous programme of musical and social activities through all levels of restrictions has meant that, as we have emerged from the pandemic, many of these relationships are now even stronger than before.

**Inclusivity:** we welcome any older person who wishes to join us, regardless of ability or disability. We do not believe in compartmentalising people and have been told, particularly by people living with dementia, that they prefer not to be pigeon-holed as such, but would rather mix with other members of the community as they would have done before their diagnosis. Throughout the pandemic, we have continued to receive referrals from local agencies seeking support for vulnerable and chronically isolated older people.

**Avoidance of stereotyping:** we do not make assumptions about participant preferences and invite them to engage with all kinds of musical genres and activities. At a recent choir festival in March, our large community choir, The Rolling Tones, brought the house down with their energetic performance of Proud Mary (Rolling on the River), a Tina Turner classic.

**Providing opportunities to learn and achieve:** beneficiaries, including those with learning disabilities or dementia, have repeatedly demonstrated that they enjoy and are stimulated by being offered a degree of challenge e.g., learning and composing new songs. Simply re-visiting old favourites can get boring after a while.

**Building on participant skills and interests:** where participants have shown a particular talent, we have worked hard to celebrate it. While we have only just been able to resume in-person performances and concerts, the last year has seen us produce a host of recordings and videos to which interested beneficiaries have been encouraged to contribute. In addition, a couple of members who are passionate about their music, plus one of our musicians and a volunteer, have created a band which has performed several times on local radio.

**Good relationships between the project musicians and carers/staff in care settings:** our team works hard at developing positive relationships with others who have responsibility for the welfare of our beneficiaries. We aim to develop an understanding of each other's issues, and to develop mutual respect, which ensures that the project is delivered collaboratively, with a shared focus on how to maximise benefits for participants.

**Ensuring participants are fully involved in evaluation and planning activities:** while most participants tell us that they would rather be making music than discussing the process/project, they appreciate being asked for their opinions about their group, and for guidance on its future development. In an extension of this work, a beneficiary steering group was created in early 2022, which we hope will provide extra insight and support for the team.

**Disciplined and focussed tracking and evaluation activities:** involving beneficiaries and volunteers in the following activities has given us great insight into the impact of our work, enabling us to move forwards with confidence and an understanding of what beneficiaries need and value:

- a) A mix of data-collection approaches i.e.: individual interviews; group sessions and video-making has maximised the extent and type of information gathered. Please follow the link to watch a Q&A video with a member of one of our sheltered housing groups: <https://youtu.be/u-mKgNR4Pd0>
- b) Where participants have struggled to understand the process, adapting questioning styles to meet the needs of each individual has facilitated their involvement
- c) To gauge the accuracy of the information gathered by the musicians in their self-evaluation activities, trustees have visited individual groups to observe sessions and talk to participants

Continuous review of the process has optimised participation in it and the usefulness of the information collected. This has been particularly important while we have been moving through the different phases of the pandemic and its restrictions – it has enabled us to assess people’s confidence about returning to sessions and to establish the approach needed to enable them to feel safe while re-connecting with their group.

## Creative, Skilled and Dedicated Musicians

The Musical Connections musicians demonstrated huge resilience and professionalism throughout the strict Covid-19 lockdowns of 2020-21, which, despite the challenges presented, illuminated the musicians’ dedication, creativity, and skill. These attributes were also in evidence in the second year of the pandemic, as they constantly adapted to evolving restrictions, taking advantage of every increase in freedom to generate new opportunities for face-to-face activities with beneficiaries. Finding suitable outdoor venues and delivering

sessions in changeable weather with difficult acoustics can be challenging, but, as with everything else, they greeted the task with determination and ingenuity, and it is testament to the excellent relationships they maintained with beneficiaries during the lockdowns that it was a relatively seamless process to reunite the groups indoors in September.



With a return to indoor sessions, the musicians have re-embraced the established practices of Musical Connections, continuing to work hard to achieve a balance between accessibility and providing a level of challenge which requires focus and application from group participants. An emphasis on developing musical understanding and offering more complex experiences than traditional singalongs is appreciated by beneficiaries who are keen to use their brains and skills and to embrace an opportunity to learn and experience something new without feeling any pressure.

The musicians provide a welcoming and supportive environment for these activities to take place and fully understand that, while the music gives group members focus and purpose, the groups need to be delivered in a way that maximises relationships with and between everyone involved – the musicians all know that, ultimately, the purpose of the music is to facilitate these relationships and is not an end in itself. This knowledge and understanding is what helps them to deliver our project so effectively – and is also what drives them to stay in contact with some of our most vulnerable members between sessions – they appreciate that ‘our musical family’ extends beyond the boundaries of session times.

Alongside traditional music-making, the musicians are now embedding digital activity within the project (see above). This has only been possible because of their own excellent digital skills, which they honed out of necessity during the pandemic.

## A Sizeable Volunteer Team

During 2020-21, our volunteer team expanded significantly, benefiting from a large influx of young people under the age of 30 who were looking to do something useful during lockdown restrictions. Once restrictions started to ease, however, these volunteers quickly fell away, presumably taking advantage of their new freedoms and, by July 2021, only 3 of the original 19 were still with us. In response, we launched a multi-pronged recruitment campaign. We:

- Attended forums/meetings with local agencies working with volunteers: York CVS, OCAY (Older Citizens Advocacy York) and York Cares
- Connected with staff and students at both of York's universities
- Posted advertisements on various websites: Live Well York; Do-It.org; York CVS and Musical Connections' own website
- Advertised volunteering opportunities on Facebook, Twitter, and York CVS's newsletters.

These efforts resulted in 10 new volunteers under the age of 30, plus the 3 who stayed on after lockdown restrictions ended, and the 6 older volunteers who stayed with us throughout. Across the year, we had a total of 38 volunteers working for the charity for varying amounts of time, in a number of different roles. At the end of March 2022, we had:



Working as 'music buddies' at weekly sessions, supporting members/musicians



Providing members with transport to sessions



Staying in phone contact between sessions with vulnerable members

Our beneficiaries benefit hugely from the volunteers' contributions:



*“Our volunteer, Tiffany, is an excellent aid to the group, she fits in like a hand fits in a glove. She’s so helpful and makes the group flow smoothly every week’*

*‘I am always in touch with my volunteers and team leaders, they all need five stars in my mind, or better still medals saying, ‘We care’.’*

It is apparent that the volunteers enjoy their work with us and benefit just as much as our primary beneficiaries from the social connection and musical participation that the groups afford them. They are also inspired by the opportunities the project presents for them to use their skills and time in support of others.

*‘Seeing the impact MC has on the lives of its members motivates me to help out whether it’s a small or large contribution of time and resources.’*

In questionnaires conducted with 15 volunteers, **ALL** said that volunteering for MC **greatly improved their mood** that day (13 said greatly):

*‘Absolutely adore helping out within sessions - they’re the highlight of my week.’*

*‘I always feel happier after attending and helping out with a session! The volunteers and Charlotte are all fantastic to be around.’*

*It puts me in a good mood as I walk out of the door, having seen smiles on people’s faces that perhaps looked lonely at the start.’*

**ALL** said that it made them feel **generally happier and more positive** (10 said **greatly**):



*'Caring for, and helping people, makes me happy - it gives me a purpose and makes me feel valued.'*

*'I've absolutely loved volunteering with Musical Connections so far - every session is different and has provided me with the opportunity to enjoy new experiences.'*

**ALL** said volunteering had helped to **improve their confidence** (9 said **greatly**):

*'It's improved my self-awareness, self-confidence, and self-esteem, all contributing to a healthier well-being.'*

**ALL** said that being a part of the MC volunteering team had improved their overall satisfaction with life (8 said **greatly**):

*'Seeing the impact that the sessions have on residents and attendees first-hand is such a humbling experience and being a part of that is a great feeling.'*

*'It helps to put my thoughts and feelings into perspective.'*



**ALL** said that they felt a valued member of the MC family (8 said **greatly**):

*'I feel very involved and welcomed by MC – they're incredibly inclusive.'*

*'I am regularly thanked for what I do'*

**ALL** said they were **very happy with the communication and support** from the team.

Towards the end of the year, we added to our volunteer team by setting up a beneficiary steering group, which we hope will provide useful feedback, and help to guide and support the team as we continue to move forwards.

## Partnership Working

With the resumption of face-to-face sessions, we have relied heavily on our partnerships with local agencies, venue providers, social prescribers, and York Medical Group. All of our regular venue providers preserved our weekly slots free of charge throughout the pandemic, and, before we were able to move indoors, we were able to hold outdoor sessions in the gardens of a York Medical Group surgery and a local church, as well as the sports court of a community centre.



Since re-starting the groups indoors, we have received a steady stream of referrals. The key partners who identify and signpost vulnerable and isolated older people to us are City of York Council's community teams, York Medical Group, NHS Primary Care Link Workers, York CVS's Ways to Wellbeing social prescribing team and Age UK York. We are also connected to other related agencies such as OCAY (Older Citizens Advocacy York) and York Neighbours, who are in a position to promote our work to potential beneficiaries.

More generally, we benefit from York CVS's excellent support for the voluntary sector in the city, and regularly attend their training and information sessions. We have also worked closely with York Cares in our search for volunteers and our efforts to improve digital inclusion, and are members of the Music for Healthy Lives Research and Practice Network steering group, an initiative led by the University of Leeds.

## Free Transport

When Musical Connections began working in community settings, it quickly became apparent that transport was a huge barrier for some potential beneficiaries, who could not use public

transport or taxis because of disability or a lack of money. Pre-Covid, we had already embedded free transport within our offer, and, since resuming in-person work, it continues to make a huge difference for people who would not otherwise be able to get to weekly sessions or additional events in the wider community. 17 participants have used this service over the last year, relying either on volunteer drivers or local taxi firms, who are aware of our beneficiaries' circumstances and needs, and have provided updated safeguarding policies which cover Covid safety.

We know that our project partners find the offer of free transport hugely helpful in encouraging and enabling their clients to get involved with us, and we believe that our commitment to providing this service on a bespoke and ongoing basis sets us apart from many local services.

## Ongoing Relationships with Intergenerational Partners

Prior to the onset of Covid-19, we were running 50+ intergenerational sessions and events per year. During the lockdowns, we stayed in contact with many of our intergenerational partners, who were keen to contribute to collaborative recordings and other online activities, such as Zoom sessions and online concerts. With restrictions still in place at the start of the year, digital activities gave both younger and older participants a rare opportunity to make music with others, to connect with the wider community, and to feel a sense of purpose and positivity at a time when their options were limited. Please follow the links to watch some of the intergenerational recordings we have made over the last year:

- Stand By Me: <https://youtu.be/RSGTXSTMNYw>
- Merry Christmas Everyone: <https://youtu.be/Q0XYE-F80CM>
- 500 Miles: <https://youtu.be/LBtk8Bcs3M8>



While continuing to deliver digital activities, the easing of restrictions over the course of the year has enabled us to gradually start re-introducing in-person intergenerational work with local schools and universities. It was with a sense of great excitement that students from both of York's universities began to join us in November, working as group 'music

buddies' and delivering instrumental and vocal workshops, and, in December, local primary schools visited sheltered housing groups for Christmas carols and workshop activities - with the rise of the Omicron variant, the children stayed outside the housing schemes, while beneficiaries stayed inside, participating alongside their younger counterparts through open doors and windows. After Christmas, once concerns about the Omicron variant had begun to subside, we set about creating a timetable of indoor intergenerational workshops, and even managed to take beneficiaries into a local nursery and primary school for a couple of 'Little Sings'.

Intergenerational work has always played a key role within our project. Our approach is one of mutuality and an expectation that everyone involved will play an equal and active role, so that all participants, regardless of age, have a sense of purpose and a properly shared and meaningful experience. It delivers immediate and direct benefits to participants, both younger and older, as well as wider sustainable benefits relating to cross-generational understanding.



Its success is built on:

- Providing enjoyable opportunities for interaction and communication between younger and older generations, where the music cuts across age and social stereotypes, and can be accessed and enjoyed by everyone, regardless of age.
- A collaborative approach, whereby the Musical Connections musicians work with teaching staff to devise projects and events which have a benefit, not just for our core beneficiaries, but for the children and young people too. Sometimes this means working with teachers to devise musical activities that link into the curriculum while at other times, it is simply about using music creatively to help everyone relax, get

involved and enjoy each other's company. By working in this way, we have found that educational establishments are much more likely to commit to ongoing collaboration than if we base our approaches to them on a vague notion of public-spiritedness and social conscience.

Over the last year, we have worked with the following:

University of York	St Aelred's Primary School	Westfield Primary School	Fulford Secondary School
University of York St John	Scarcroft Primary School	St George's Primary School	Clifton Day Nursery

The interactive content and the regularity of this work helps isolated older people to get involved or re-involved in the life of their community, and to enjoy positive experiences and connections with other people and generations. The evidence suggests that it is an equally positive experience for younger participants:

*'It was a pleasure for us, a treat for the children. I know the children enjoyed it equally as much as the choir'*



## Solid Financial Management

During 2020-21, funders were very supportive of a re-deployment of their grants towards Covid-response activities, and a significant amount of covid-related funding was made available for charities working to reduce isolation amongst older people. The challenge for 2021-22 was to secure funding which not only continued to facilitate Covid-response activities where needed, but also enabled us to work towards a resumption of in-person work. Our priority was to move out of crisis mode, and to focus once more on longer-term sustainability, and we were delighted that several funders, including Arts Council England were keen to support us in this. Unlike many other charities, we were in an excellent financial position at

the end of the year, with our reserves intact and significant grant funding in place for the next 16 months.

The grant funding was complemented by income from voluntary participant contributions at weekly sessions (we request £4, but do not exclude anyone who is unwilling or unable to contribute), community fundraising and additional donations from members and project supporters.

## Steadfast and Supportive Board of Trustees

Throughout the two years of the pandemic, our musicians have been supported by an unchanging Board of Trustees, all of whom have demonstrated the same flexibility and dedication as the musicians. As the project has returned to near-normal, the trustees have been closely involved every step of the way, providing guidance, encouragement, and careful thinking in the face of the complexities raised by evolving Covid restrictions and a move from laws to guidance.

The trustees bring a range of skills to the charity; our Chair was previously Group Manager of Adult Services for City of York Council, and our Treasurer is a former marketing manager within Leeds City Council. The other trustees are a retired GP, a former senior lecturer in Music at York St John University and a retired engineer, who is also a Musical Connections choir member.

## FUTURE PLANS

We are looking to the next year with optimism, and hope that the road back to normality will now be relatively smooth. Over the next 12 months, we will be:

- Continuing to promote and expand our groups and choirs so that we will soon be back working with 300+ beneficiaries
- Continuing to re-build our intergenerational programme, with the intention of delivering up to 50 sessions and events per year
- Embedding digital activities alongside the core group work by continuing to create collaborative recordings and to provide ongoing support to members who are getting to grips with their tablets
- Maintaining an ongoing search for volunteers – although we have some longstanding regulars, and notwithstanding our new recruits, we wish to pre-empt any change in numbers by ensuring that we always have new people coming through
- Developing our fledgling steering group
- Implementing significant organisational development: our current Project Director has led Musical Connections for 13 years and will be stepping down in July to become a trustee, writing grant applications for the charity on a voluntary basis. She will be replaced by two existing members of the team who have shown dedication and commitment to the work of Musical Connections throughout the challenges of Covid-19, as well as taking on new responsibilities and developing new skills which are now helping the work of the charity to evolve and grow in a post-pandemic world. They have been receiving intensive project management training from the outgoing Project Director, who will continue to provide them with close support in her new role as a trustee of the charity.

# FINANCES

## Income and Expenditure

Table 1 highlights the overall receipts and payments from 1<sup>st</sup> April 2021 to 31<sup>st</sup> March 2022, the brought forward balance at the end of 20/21, and the subsequent bank balance.

The total receipts up to 31<sup>st</sup> March were £100,774, and the total payments were £72,914, which leaves a balance of £27,860 for the financial year. When added to the carried forward balance from 2020/21 (£52,345), this left Musical Connections with a total balance of £80,205 for the end of the financial year.

The total amount of receipts allocated to unrestricted funding was £19,729, and there were payments to the value of £10,775, thus leaving an unrestricted surplus of £8,954 at the end of 2021/22. When added to the balance brought forward at the end of 20/21 (£27,539) and accounting for some minor transfers of funds (£34), this leaves the charity with £36,459 of unrestricted funds.

The total amount of receipts allocated to restricted funding was £81,045, and there were payments to the value of £62,139, thus leaving a balance of £18,906 in restricted grants to carry forward into the next financial year. When added to the balance of restricted funding brought forward at the end of 20/21 (£24,806) and allowing for a small number of transfers between funds, this leaves Musical Connections with £43,746 in restricted funds to carry forward into 22/23.

The total receipts received in 21/22 (£100,774) were made up of grants received £80,045 (79%), followed by session fees and contributions of £9,018 (9%). Donations from organisations (£4,687), community fundraising (£4,513) and individual giving (£2,511) together represented the remaining 12% of the total.

The payments (£72,914) comprised the overall people costs (81%) at £58,912. The top five categories of payments and the % of the total they accounted for, were as follows:

Project management fees	- £22,140 (30%)
Musicians' session fees	- £17,596 (24%)
Community involvement activities	- £16,753 (23%)
Equipment	- £5,372 (7%)
Beneficiary Travel and Transport	- £2,145 (3%)

Table 2 provides a breakdown of receipts and payments for unrestricted funds and each restricted fund. It also provides the current surplus for each fund, the amount brought forward from 20/21 and the funds carried forward at the end of the financial year. This table also shows where payments were made against a brought forward balance from 20/21 rather than a receipt in 21/22 e.g., Wharfedale Foundation.

Table 3 shows the statement of Musial Connections' assets and liabilities on 31<sup>st</sup> March 2022.

Table 1: Receipts & payments for the year ending: 31<sup>st</sup> March 2022

			2022	2021
	Unrestricted funds	Restricted funds	Total funds	Total funds
	£	£	£	£
<b>Receipts</b>				
Session fees & contributions	9,018	-	9,018	1,071
Grants	-	80,045	80,045	42,290
Donations from organisations	3,687	1,000	4,687	1,812
Donations from individuals	2,511	-	2,511	6,093
Community fundraising	4,513	-	4,513	6,540
Events & training	-	-	-	-
<b>Total receipts</b>	<b>19,729</b>	<b>81,045</b>	<b>100,774</b>	<b>57,806</b>
<b>Payments</b>				
Session costs - musicians	3,190	14,406	17,596	-
Marketing & website	31	1,247	1,278	433
Meeting costs	58	201	259	352
Travel costs	41	2,104	2,145	315
Musical equipment & music	261	5,111	5,372	1,699
Insurance	-	372	372	372
Project management costs	3,240	18,900	22,140	25,065
Stationery, printing & office costs	316	769	1,085	1,236
Funding bids & fundraising	884	-	884	823
Training costs	280	1,506	1,786	60
Community involvement activities	1,176	15,577	16,753	37,578
Venue costs	396	1,326	1,722	51
Volunteer costs & DBS checks	48	96	144	92
COVID self-isolation payment	378	-	378	-
Consumables, repairs & renewals	115	454	569	-
Independent examination	300	-	300	-
Self-evaluation	-	-	-	352
Miscellaneous expenses	61	70	131	313
<b>Total payments</b>	<b>10,775</b>	<b>62,139</b>	<b>72,914</b>	<b>68,741</b>
<b>Net of receipts/(payments)</b>	<b>8,954</b>	<b>18,906</b>	<b>27,860</b>	<b>-10,935</b>
<b>Transfers between funds</b>	<b>-34</b>	<b>34</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>27,539</b>	<b>24,806</b>	<b>52,345</b>	<b>63,280</b>
<b>Balance carried forward</b>	<b>36,459</b>	<b>43,746</b>	<b>80,205</b>	<b>52,345</b>

Table 2 - Unrestricted and Restricted Funds

	Balance b/fwd	Income received	Resources expended	Transfer of funds	Balance c/fwd
	£	£	£	£	£
<b>Unrestricted</b>	27,539	19,729	10,775	-34	36,459
<b>Restricted</b>					
Derwenthorpe Community Fund	293	-	293	-	-
Wharfedale Foundation	2,000	-	640	-	1,360
Masonic Charitable Foundation	2,795	3,594	6,389	-	-
Jack Brunton Charitable Trust	2,000	-	2,000	-	-
HDH Wills 1965 Charitable Trust	500	-	430	-	70
Ashley Family Foundation	5,000	5,000	8,430	-	1,570
Liz and Terry Bramwell	5,000	-	5,001	1	-
Ways to Wellbeing York CVS	2,218	-	2,219	1	-
Whitwam Family Charitable Trust	5,000	-	5,001	1	-
Brelms Trust CIO	-	5,000	3,555	-	1,445
Awards for All	-	9,990	6,760	-	3,230
Betty's and Taylor's	-	5,000	5,000	-	-
Magic Little Grants	-	500	500	-	-
Westfield Ward	-	500	500	-	-
Hobson Charity	-	5,000	2,079	-	2,921
Headley Trust	-	1,000	1,031	31	-
Evan Cornish Foundation	-	5,000	5,000	-	-
Garfield Weston Foundation	-	10,000	2,541	-	7,459
Arts Council	-	17,361	113	-	17,248
Purey Cust Trust	-	1,684	830	-	854
Headley Trust (2)	-	5,000	2,208	-	2,792
Postcode Neighbourhood	-	6,416	1,619	-	4,797
<b>Total Restricted</b>	<b>24,806</b>	<b>81,045</b>	<b>62,139</b>	<b>34</b>	<b>43,746</b>
<b>Total Funds</b>	<b>52,345</b>	<b>100,774</b>	<b>72,914</b>	<b>-</b>	<b>80,205</b>

Table 3 - Statement of Assets and Liabilities on 31<sup>st</sup> March 2022

			2021/22	2020/21
	Unrestricted funds	Restricted funds	Total funds	Total funds
	£	£	£	£
<b>Assets</b>				
Current bank account	36,315	43,746	80,061	52,340
Petty cash	144	-	144	5
	<b>36,459</b>	<b>43,746</b>	<b>80,205</b>	<b>52,345</b>
<b>Assets retained for the charity's own use</b>	<b>Fund</b>	<b>Cost</b>	<b>Current Value</b>	
<b>Details</b>		£	£	
3 x keyboard	Unrestricted	300	150	
1 x keyboard	Life Less Lonely	155	50	
Large amp	Unrestricted	150	50	
Portable amp	Robert McAlpine	160	50	
Portable amp	Life Less Lonely	149	50	
3 x iPod touch	Freemasons	597	150	
Loop station	Unrestricted	135	20	
Chime bars	Freemasons	260	100	
Chime bars	Unrestricted	260	100	
Chime bars	Micklegate Ward	127	100	
Projector & case	Unrestricted	612	50	
Portable speaker	Unrestricted	160	50	
2 x camera	Unrestricted	379	100	
Notebook	Freemasons	299	150	
2 x tablet	Unrestricted	200	160	
45 x tablets	Awards for All	4,455	4,455	
			2022	2021
	Unrestricted funds	Restricted funds	Total funds	Total funds
	£	£	£	£
<b>Liabilities</b>				
Independent examination fee	300	-	300	300
	<b>300</b>	<b>-</b>	<b>300</b>	<b>300</b>

## Fundraising

Having had to adjust our fundraising strategy during Covid to take account of the loss of income from face-to-face sessions, this year has seen us once again generating income from direct fee income and participant donations at sessions, as well as from grants, individual/corporate donations and community fundraising:

**Grants and organisational donations:** having applied for and received a considerable amount of Covid-response funding in 2020-21, our focus over the last year has been to generate new grants/donations aimed at stabilising and sustaining us during and beyond the transition out of crisis mode. We have been successful in securing a number of multi-year grants, the most significant coming from the Garfield Weston Foundation (£30,000 over 3 years) and Arts Council England (£34,722 over 20 months)

**Weekly voluntary donations at sessions:** these have come from participants at our community-based groups. This year, we increased our suggested donation to £4 (we had planned to do so in April 2020, following 5 years of £3 donations) – in reality, some beneficiaries have donated more, and some have given less. While these donations are an important source of income for us, nobody is excluded if they are unable or willing to make a contribution

**Direct fee income:** this has come from a private care-home which has paid us directly for sessions

**Community fundraising and individual donations:** during the lockdowns, we worked hard to increase income from these sources, and our efforts continue to pay off, with income from these sources continuing to be considerably higher than it was in the year before the pandemic. With the closure of Virgin Money Giving, we have switched to Invest My Community for online fundraising, while community fundraising activities have included a bric-a-brac fair, concerts, carol-singing and sponsored events - the most notable of these was based on The Proclaimers' song '500 Miles' – we challenged our musicians and members to walk 500 miles to raise £500 and actually raised £1,331.

We would like to thank the following funders for their support over the last year:

Arts Council England  
 Ashley Family Foundation  
 Bettys & Taylor's Coronavirus Community Fund  
 Brelms Trust CIO  
 Derwenthorpe Community Fund  
 Evan Cornish Foundation  
 Garfield Weston Foundation  
 Headley Trust  
 Hobson Charity  
 HDH Wills 1965 Charitable Trust  
 Jack Brunton Charitable Trust  
 Liz & Terry Bramall Foundation  
 Magic Little Grants  
 Masonic Charitable Foundation  
 Postcode Neighbourhood Trust (*a grant-giving charity funded entirely by players of the People's Postcode Lottery*)  
 Purey Cust Trust  
 Ways to Wellbeing York CVS  
 City of York Council's Westfield Ward  
 Whitwam Family Charitable Trust

## **Reserves Policy**

Musical Connections' Reserves Policy, approved by the Trustees in July 2021, states that the charity should hold a maximum of £40k in reserves. This level of reserves was set after careful consideration of all the potential reasons reserves would be needed e.g. to aid cash flow, contingency planning to mitigate against unexpected expenditure, to commit designated funds to expenditure not covered by annual income and finally the closure of the charity. After due consideration of all these potential calls on reserves, it was determined that Musical Connections would need to hold a range of reserves between £9.5k and £40k. The trustees took the decision that they needed to protect the beneficiaries in the event of having to cease its operation and therefore the figure of £40k was agreed, as being 50% of the current operational costs of running the project with an additional 10% to go towards paying for any

professional services that may need to be employed to aid closure. This level of reserves would protect the charity's beneficiaries, who are mainly socially isolated and vulnerable adults, and enable it to wind down its operation in a sustainable way, rather than abruptly withdraw its services, which would have a detrimental impact on their quality of life. At the end of 2021/22, the level of reserves held was £36, 459.

# **APPENDIX**

Independent Examination and Trustees Annual Report

# **Musical Connections**

(Charity Number: 1165993)

## **Trustees Annual Report & Financial Statements for the year ended**

**31st March 2022**

# **outsourc**

Charity accounts preparation &  
independent examination service

# Musical Connections

(Charity Number: 1165993)

## Contents

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<b>Statement of assets and liabilities</b>	<b>7</b>
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## Trustees' Annual Report

**From:** 1st April 2021

**To:** 31st March 2022

**Charity's full name** Musical Connections

**Registered Charity number** 1165993

### Objectives and activities

#### Summary of the purposes of the charity set out in its governing document

Musical Connections' objects, as set out in the constitution, are as follows:

- To advance the wellbeing of vulnerable and socially isolated people
- To relieve isolation and social exclusion amongst vulnerable people
- To provide opportunities for vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

#### Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts

During the year, we took advantage of every change in Covid-19 rules to advance towards an eventual return to indoor, in-person groups. Over the course of 2021-22, the following activities were delivered by our team of dedicated musicians, all of whom were closely supervised by the Project Director:

- On 12th April, when we were allowed to meet in groups of 6, our musicians went out 'on the road', arranging for 3 or 4 people to sing together in gardens and public spaces. This was the first time in over a year that these individuals had seen other members of their Musical Connections group/choir in person.
- On 21st May, when up to 30 were allowed to meet in groups outside, we began running 3 weekly sessions in outdoor community venues. Beneficiaries from across the project sang together in different York locations – a church garden, a community centre sports pitch, and a garden attached to one of York Medical Group's GP surgeries.
- We live-streamed several of the above sessions for people with online access to watch at home.
- On 6th September, with permission from the City of York Council, we were finally able to resume 3 sheltered housing scheme groups (indoors) and reinstated an additional 4 groups in community venues.
- Between November 2021 and February 2022, a further three groups commenced.

As a result of these efforts, by the end of March 2022, we were running the following 10 weekly groups:

- 4 in City of York Council's sheltered housing schemes
- 1 in a private care-home
- 3 in partnership with York Medical Group - as we were no longer able to run these groups in YMG surgeries, we found alternative venues for them in the wider community
- 2 community choirs

As the year wore on, members from across all of the groups also took part in an increasing number of intergenerational and community-based events. Free transport was provided for anyone who needed it.

In addition, and building on learning from the pandemic, we included digital and online activities alongside the re-instated in-person work. We:

- Created video recordings, some of which were intergenerational collaborations.
- Secured funding from the National Lottery's Awards for All programme to purchase a stock of tablets for use by members and to run a 6-month training programme aimed at enabling them to participate in recordings and online activities and to access a bank of Musical Connections online material.

The trustees consider that they have complied with their duties to have due regard to the public benefit published by the Charity Commission.

### **Achievements and performance**

**Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.**

In the first half of the financial year 2021-22, we managed to run 35 outdoor and 'on the road' sessions (some of which were live-streamed to a wider audience) with 70 beneficiaries. Between September 2021 and March 2022, we ran a total of 219 in-person sessions and events involving 213 older, vulnerable and isolated beneficiaries who totalled over 2,200 attendances between them. Of these activities:

- 10 were intergenerational workshops, events and concerts where group beneficiaries made music with children and young people from local schools and universities
- 6 were community-based events involving members singing at a local market, a supermarket, a city centre fundraiser and events involving an additional 60 people from an Age UK day club and several local authority housing schemes
- 4 were radio sessions

By the end of the year, we had worked with a total of 273 older, vulnerable and isolated people, and over 250 children and young people.

111 beneficiaries completed feedback questionnaires over two tracking phases in October 2021 and March 2022, with the following findings:

- 99% said going to their Musical Connections session improved their mood on the day (94% said greatly)
- 100% said going to their group helped them to feel happier and more positive about life (84% said greatly)
- 95% said that taking part improved their confidence (60% said greatly)
- 89% said their physical wellbeing was improved
- 99% said they felt greater satisfaction with their lives
- 98% said going to their group improved their alertness and activity levels
- 98% said it gave them a sense of purpose and something to look forward to
- 95% said it enabled them to make increased contact with other people
- 96% said they had made new friends through their group
- 100% said they considered themselves to be a valued member of the MC Family (60% said greatly)
- 95% said their overall wellbeing was improved

We have been aided in our achievements by a total of 38 volunteers who have:

- worked as 'music buddies' at weekly sessions, supporting group members and musicians
- provided members with transport to sessions
- stayed in phone contact between sessions with especially vulnerable members

Excellent relationships with many project partners have also been instrumental to our success. NHS social prescribers and the council's community teams have made regular referrals, and York Medical Group has continued to promote our work to their patients. Two local radio stations, Yorkmix and YO1 Radio, have enabled us to enjoy a strong radio presence across the city, and we are delighted that a Yorkmix presenter has formally accepted the role of 'Musical Connections ambassador'.

More details on our achievements and the wider impact of our work may be found in our Annual Report.

## Financial review

### Review of the charity's financial position at the end of the period

At the end of the 2021/22 financial year, Musical Connections had been in receipt of £100,774 and made payments of £72,914 leaving a surplus balance of £27,860 for the year. This balance can be split into unrestricted and restricted as follows: a £8,954 surplus in unrestricted versus a £18,906 surplus in restricted grant income. When this surplus is added to the carried forward balance from 2020/21 (£52,345), this leaves Musical Connections with a total balance of £80,205 at the end of the financial year, split into an unrestricted fund of £36,459 and £43,746 restricted funds.

### Statement explaining the policy for holding reserves stating why they are held

Musical Connection's Reserves Policy, approved by Trustees in July 2021, states that the charity should hold a maximum of £40k in reserves. This level of reserves was set after careful consideration of all the potential reasons reserves would be needed e.g. to aid cash flow, contingency planning to mitigate against unexpected expenditure, to commit designated funds to expenditure not covered by annual income and finally the closure of the charity. After due consideration of all these potential calls on reserves, it was determined that Musical Connections would need to hold a range of reserves between £9.5k and £40k. The trustees took the decision that they needed to protect the beneficiaries in the event of it having to cease its operation and therefore the figure of £40k was agreed upon. This level of reserves would protect the charity's beneficiaries, who are the most socially isolated and vulnerable adults and enable it to wind down its operation in a sustainable way, rather than abruptly withdraw its services which would have a detrimental impact on their quality of life.

### Amount of reserves held

At the end of 2021/22, the amount of reserves held was £36.5k. The Reserves Policy states that the maximum reserves held should be £40k, which at present reflects 50% of the core operational costs of running the sessions and an additional 10% to go towards paying for professional services that may need to be employed to aid closure. The ratio of reserves to net annual operating costs was 45:55 at the end of the financial year.

### Reasons for holding zero reserves

N/A

### Funds materially in deficit

N/A

### Explanation of any uncertainties about the charity continuing as a going concern

N/A

## Structure, governance and management

<b>Description of the charity's trusts</b>	N/A
<b>Type of governing document</b>	Constitution
<b>How the charity is constituted</b>	Charitable Incorporated Organisation
<b>Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees</b>	Clause 10.1 of our constitution states that 'apart from the first charity trustees', every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. Clause 10.2 states 'in selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective management of the CIO'.

**Reference and administration details**

Charity's full name Musical Connections

Other names the charity is known by N/A

Charity's principal address PO Box 724  
York  
YO1 0HL**Names of the trustees who manage the charity**

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Val Sutton	Chair		
Jo Farrington	Treasurer		
Chris Bartram			
Hazel Brown			
Richard Frost			

**Name of trustees holding title to property belonging to the charity**

Trustee name	Dates acted if not for whole year
N/A	N/A

**Names and addresses of advisers (OPTIONAL)**

Type of adviser	Name	Address
Independent Examiner	Karen Wood ACMA, CGMA	Outsource Accountancy Services & Independent Examinations Hiscox Building, Peasholme Green YO1 7PR

Bankers Natwest Bank

Name of chief executive or names of senior staff members  
N/A**Declaration**

The trustees declare that they have approved the Trustees Annual Report and Accounts

Signed on behalf of the charity's trustees

Signature



Full Name Joanne Maria Farrington

Position Treasurer

Date 29/7/22

<b>Independent examiner's report to the trustees of Musical Connections</b>
---

I report on the accounts of: **Musical Connections**  
 for the year ended: **31st March 2022** which are set out on pages 6 to 9.

**Responsibilities and basis of report**

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 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 material 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 Trust 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.

K Wood
--------

**Karen Wood (ACMA)**  
 Outsource independent examination  
 service  
 The Hiscox Building  
 Peasholme Green  
 York YO1 7PR

9/9/22
--------

**Date:**

**Musical Connections**  
(Charity Number: 1165993)

<b>Receipts &amp; payments accounts for the year ending:</b>	<b>31st March 2022</b>			
	<b>Unrestricted</b>	<b>Restricted</b>	<b>2022</b>	<b>2021</b>
	<b>funds</b>	<b>funds</b>	<b>Total</b>	<b>Total</b>
	<b>£</b>	<b>£</b>	<b>funds</b>	<b>funds</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Receipts</b>				
Session fees & contributions	9,018	-	9,018	1,071
Grants	-	80,045	80,045	42,290
Donations from organisations	3,687	1,000	4,687	1,812
Donations from individuals	2,511	-	2,511	6,093
Community fundraising	4,513	-	4,513	6,540
Events & training	-	-	-	-
<b>Total receipts</b>	<b>19,729</b>	<b>81,045</b>	<b>100,774</b>	<b>57,806</b>
<b>Payments</b>				
Session costs - musicians	3,190	14,406	17,596	-
Marketing & Website	31	1,247	1,278	433
Meeting costs	58	201	259	352
Travel costs	41	2,104	2,145	315
Musical equipment & music	261	5,111	5,372	1,699
Insurance	-	372	372	372
Project management costs	3,240	18,900	22,140	25,065
Stationery, printing & office costs	316	769	1,085	1,236
Funding bids & fundraising	884	-	884	823
Training costs	280	1,506	1,786	60
Community involvement activities/volunteer management - musicians	1,176	15,577	16,753	37,578
Venue costs	396	1,326	1,722	51
Volunteer costs & DBS checks	48	96	144	92
Covid self isolation payment	378	-	378	-
Consumables, repairs & renewals	115	454	569	-
Independent examination	300	-	300	-
Self evaluation	-	-	-	352
Miscellaneous expenses	61	70	131	313
<b>Total payments</b>	<b>10,775</b>	<b>62,139</b>	<b>72,914</b>	<b>68,741</b>
<b>Net of receipts/(payments)</b>	<b>8,954</b>	<b>18,906</b>	<b>27,860</b>	<b>(10,935)</b>
<b>Transfers between funds</b>	<b>(34)</b>	<b>34</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>27,539</b>	<b>24,806</b>	<b>52,345</b>	<b>63,280</b>
<b>Balance carried forward</b>	<b>36,459</b>	<b>43,746</b>	<b>80,205</b>	<b>52,345</b>

**Musical Connections**  
(Charity Number: 1165993)

<b>Statement of assets and liabilities at:</b>	<b>31st March 2022</b>
--	------------------------

	Unrestricted funds	Restricted funds	2022 Total funds	2021 Total funds
	£	£	£	£
<b>Assets</b>				
Current bank account	36,315	43,746	80,061	52,340
Petty Cash	144	-	144	5
	<b>36,459</b>	<b>43,746</b>	<b>80,205</b>	<b>52,345</b>

Assets retained for charity's own use	Fund	Cost	Current value
		£	£
<b>Details</b>			
3 x Keyboard	Unrestricted	300	150
1 x Keyboard	Life Less Lonely	155	50
Large amp	Unrestricted	150	50
Portable amp	Robert McAlpine	160	50
Portable amp	Life Less Lonely	149	50
3 x ipod touch	Freemasons	597	150
Loop station	Unrestricted	135	20
Chime bars	Freemasons	260	100
Chime bars	Unrestricted	260	100
Chime bars	Micklegate Ward	127	100
Projector & case	Unrestricted	612	50
Portable speaker	Unrestricted	160	50
2 x camera	Unrestricted	379	100
Notebook	Freemasons	299	150
2 x tablet	Unrestricted	200	160
45 x tablets	Awards for All	4,455	4,455

	Unrestricted funds	Restricted funds	2022 Total funds	2021 Total funds
	£	£	£	£
<b>Liabilities</b>				
Independent examination fee	300	-	300	300
	<b>300</b>	<b>-</b>	<b>300</b>	<b>300</b>

**Musical Connections**  
(Charity Number: 1165993)

**Notes to the accounts for the year ended:**

**31st March 2022**

**1. Basis of accounts**

The Trustees have taken advantage of section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

**2. Restricted income funds**

Where funds were originally granted for face to face work, funders kindly allowed their grants to be re-deployed to support Covid - response activities.

Fund name	Purpose
Derwenthorpe Community Fund	For hire of a venue for the Rolling Tones
Wharfedale Foundation	For intergenerational work ('Generations in Harmony')
Masonic Charitable Foundation	Final instalment of a 3-year grant to help sustain and develop our work. The grant comes with a strong focus on active co-operation, with a view to increasing and sharing learning
Jack Brunton Charitable Trust	A grant towards core costs
HDH Wills 1965 Charitable Trust	Funding towards venue hire for Honeysuckle Singers
Ashley Family Foundation	Second instalment of a 2-year grant towards core costs for 'Communities in Harmony'
Liz & Terry Bramwell	Grant supporting post-Covid resumption of in-person activities
Ways to Wellbeing York CVS	A grant to aid the start-up of a new music group linked to York Medical Group's Monkgate surgery
Whitwam Family Charitable Trust	Grant towards core costs
Brelms Trust	Second instalment of a 3-year grant to deliver music groups and intergenerational activities
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Westfield Ward	A grant towards re-starting in-person sessions at Gale Farm Court independent living community
Hobson Charity	Funding to enable us to provide free beneficiary transport
Headley Trust	Grant towards core costs
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Arts Council England	First instalment of a grant to support: the resumption of weekly, in-person music groups and intergenerational activities; the inclusion of digital/online activities; significant organisational development
Purey Cust Trust	Funding for the resumption of Acomb Singers' in-person sessions
Headley Trust (2)	Grant towards core costs
Postcode Neighbourhood Trust	Grant towards resumption of The Rolling Tones Community Choir

	Balance b/fwd £	Income received £	Resources expended £	Transfer of funds £	Balance c/fwd £
<b>Total Unrestricted</b>	<b>27,539</b>	<b>19,729</b>	<b>10,775</b>	<b>(34)</b>	<b>36,459</b>
Derwenthorpe Community Fund	293	-	293	-	-
Wharfedale Foundation	2,000	-	640	-	1,360
Masonic Charitable Foundation	2,795	3,594	6,389	-	-
Jack Brunton Charitable Trust	2,000	-	2,000	-	-
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Liz & Terry Bramwell	5,000	-	5,001	1	-
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Brelms Trust	-	5,000	3,555	-	1,445
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Westfield Ward		500	500	-	-
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<b>Total Funds</b>	<b>52,345</b>	<b>100,774</b>	<b>72,914</b>	<b>-</b>	<b>80,205</b>

**Transfer between funds**

Funds have been transferred from unrestricted funds to various overspent restricted funds,

**Approval of accounts for the year ended:**

**31st March 2022**

The report and accounts were approved at a meeting of the Trustees held  
on:

27/7/22

Date

J F - st

Signed for and on behalf of the trustees

27/7/22

Date

J FARRINGTON

Print name

TREASURER

Position (e.g. Chair etc)

# **Musical Connections**

(Charity Number: 1165993)

## **Trustees Annual Report & Financial Statements for the year ended**

**31st March 2022**

# **outsourcE**

Charity accounts preparation &  
independent examination service

# **Musical Connections**

(Charity Number: 1165993)

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# Trustees' Annual Report

**From:** 1st April 2021

**To:** 31st March 2022

**Charity's full name** Musical Connections

**Registered Charity number** 1165993

## Objectives and activities

### Summary of the purposes of the charity set out in its governing document

Musical Connections' objects, as set out in the constitution, are as follows:

- To advance the wellbeing of vulnerable and socially isolated people
- To relieve isolation and social exclusion amongst vulnerable people
- To provide opportunities for vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

### Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts

During the year, we took advantage of every change in Covid-19 rules to advance towards an eventual return to indoor, in-person groups. Over the course of 2021-22, the following activities were delivered by our team of dedicated musicians, all of whom were closely supervised by the Project Director:

- On 12th April, when we were allowed to meet in groups of 6, our musicians went out 'on the road', arranging for 3 or 4 people to sing together in gardens and public spaces. This was the first time in over a year that these individuals had seen other members of their Musical Connections group/choir in person.
- On 21st May, when up to 30 were allowed to meet in groups outside, we began running 3 weekly sessions in outdoor community venues. Beneficiaries from across the project sang together in different York locations – a church garden, a community centre sports pitch, and a garden attached to one of York Medical Group's GP surgeries.
- We live-streamed several of the above sessions for people with online access to watch at home.
- On 6th September, with permission from the City of York Council, we were finally able to resume 3 sheltered housing scheme groups (indoors) and reinstated an additional 4 groups in community venues.
- Between November 2021 and February 2022, a further three groups commenced.

As a result of these efforts, by the end of March 2022, we were running the following 10 weekly groups:

- 4 in City of York Council's sheltered housing schemes
- 1 in a private care-home
- 3 in partnership with York Medical Group - as we were no longer able to run these groups in YMG surgeries, we found alternative venues for them in the wider community
- 2 community choirs

As the year wore on, members from across all of the groups also took part in an increasing number of intergenerational and community-based events. Free transport was provided for anyone who needed it.

In addition, and building on learning from the pandemic, we included digital and online activities alongside the re-instated in-person work. We:

- Created video recordings, some of which were intergenerational collaborations.
- Secured funding from the National Lottery's Awards for All programme to purchase a stock of tablets for use by members and to run a 6-month training programme aimed at enabling them to participate in recordings and online activities and to access a bank of Musical Connections online material.

The trustees consider that they have complied with their duties to have due regard to the public benefit published by the Charity Commission.

## **Achievements and performance**

### **Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.**

In the first half of the financial year 2021-22, we managed to run 35 outdoor and 'on the road' sessions (some of which were live-streamed to a wider audience) with 70 beneficiaries. Between September 2021 and March 2022, we ran a total of 219 in-person sessions and events involving 213 older, vulnerable and isolated beneficiaries who totalled over 2,200 attendances between them. Of these activities:

- 10 were intergenerational workshops, events and concerts where group beneficiaries made music with children and young people from local schools and universities
- 6 were community-based events involving members singing at a local market, a supermarket, a city centre fundraiser and events involving an additional 60 people from an Age UK day club and several local authority housing schemes
- 4 were radio sessions

By the end of the year, we had worked with a total of 273 older, vulnerable and isolated people, and over 250 children and young people.

111 beneficiaries completed feedback questionnaires over two tracking phases in October 2021 and March 2022, with the following findings:

- 99% said going to their Musical Connections session improved their mood on the day (94% said greatly)
- 100% said going to their group helped them to feel happier and more positive about life (84% said greatly)
- 95% said that taking part improved their confidence (60% said greatly)
- 89% said their physical wellbeing was improved
- 99% said they felt greater satisfaction with their lives
- 98% said going to their group improved their alertness and activity levels
- 98% said it gave them a sense of purpose and something to look forward to
- 95% said it enabled them to make increased contact with other people
- 96% said they had made new friends through their group
- 100% said they considered themselves to be a valued member of the MC Family (60% said greatly)
- 95% said their overall wellbeing was improved

We have been aided in our achievements by a total of 38 volunteers who have:

- worked as 'music buddies' at weekly sessions, supporting group members and musicians
- provided members with transport to sessions
- stayed in phone contact between sessions with especially vulnerable members

Excellent relationships with many project partners have also been instrumental to our success. NHS social prescribers and the council's community teams have made regular referrals, and York Medical Group has continued to promote our work to their patients. Two local radio stations, Yorkmix and YO1 Radio, have enabled us to enjoy a strong radio presence across the city, and we are delighted that a Yorkmix presenter has formally accepted the role of 'Musical Connections ambassador'.

More details on our achievements and the wider impact of our work may be found in our Annual Report.

## Financial review

### Review of the charity's financial position at the end of the period

At the end of the 2021/22 financial year, Musical Connections had been in receipt of £100,774 and made payments of £72,914 leaving a surplus balance of £27,860 for the year. This balance can be split into unrestricted and restricted as follows: a £8,954 surplus in unrestricted versus a £18,906 surplus in restricted grant income. When this surplus is added to the carried forward balance from 2020/21 (£52,345), this leaves Musical Connections with a total balance of £80,205 at the end of the financial year, split into an unrestricted fund of £36,459 and £43,746 restricted funds.

### Statement explaining the policy for holding reserves stating why they are held

Musical Connection's Reserves Policy, approved by Trustees in July 2021, states that the charity should hold a maximum of £40k in reserves. This level of reserves was set after careful consideration of all the potential reasons reserves would be needed e.g. to aid cash flow, contingency planning to mitigate against unexpected expenditure, to commit designated funds to expenditure not covered by annual income and finally the closure of the charity. After due consideration of all these potential calls on reserves, it was determined that Musical Connections would need to hold a range of reserves between £9.5k and £40k. The trustees took the decision that they needed to protect the beneficiaries in the event of it having to cease its operation and therefore the figure of £40k was agreed upon. This level of reserves would protect the charity's beneficiaries, who are the most socially isolated and vulnerable adults and enable it to wind down its operation in a sustainable way, rather than abruptly withdraw its services which would have a detrimental impact on their quality of life.

### Amount of reserves held

At the end of 2021/22, the amount of reserves held was £36.5k. The Reserves Policy states that the maximum reserves held should be £40k, which at present reflects 50% of the core operational costs of running the sessions and an additional 10% to go towards paying for professional services that may need to be employed to aid closure. The ratio of reserves to net annual operating costs was 45:55 at the end of the financial year.

### Reasons for holding zero reserves

N/A

### Funds materially in deficit

N/A

### Explanation of any uncertainties about the charity continuing as a going concern

N/A

## Structure, governance and management

### Description of the charity's trusts

N/A

### Type of governing document

Constitution

### How the charity is constituted

Charitable Incorporated Organisation

### Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees

Clause 10.1 of our constitution states that 'apart from the first charity trustees', every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. Clause 10.2 states 'in selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective management of the CIO'.

**Reference and administration details**

Charity's full name Musical Connections

Other names the charity is known by N/A

Charity's principal address PO Box 724  
York  
YO1 0HL

**Names of the trustees who manage the charity**

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Val Sutton	Chair		
Jo Farrington	Treasurer		
Chris Bartram			
Hazel Brown			
Richard Frost			

**Name of trustees holding title to property belonging to the charity**

Trustee name	Dates acted if not for whole year
N/A	N/A

**Names and addresses of advisers (OPTIONAL)**

Type of adviser	Name	Address
Independent Examiner	Karen Wood ACMA, CGMA	Outsource Accountancy Services & Independent Examinations Hiscox Building, Peasholme Green YO1 7PR

Bankers Natwest Bank

**Name of chief executive or names of senior staff members**

N/A

**Declaration**

The trustees declare that they have approved the Trustees Annual Report and Accounts

Signed on behalf of the charity's trustees

Signature



Full Name Joanne Maria Farrington

Position Treasurer

Date 29/7/22

**Independent examiner's report to the trustees of Musical Connections**

I report on the accounts of: **Musical Connections**  
for the year ended: **31st March 2022** which are set out on pages 6 to 9.

**Responsibilities and basis of report**

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 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 material 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 Trust 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.

*K Wood*

**Karen Wood (ACMA)**  
Outsource independent examination  
service  
The Hiscox Building  
Peasholme Green  
York YO1 7PR

*9/9/22*

**Date:**

**Musical Connections**  
(Charity Number: 1165993)

<b>Receipts &amp; payments accounts for the year ending:</b>		<b>31st March 2022</b>		
	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>2022 Total funds</b>	<b>2021 Total funds</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Receipts</b>				
Session fees & contributions	9,018	-	9,018	1,071
Grants	-	80,045	80,045	42,290
Donations from organisations	3,687	1,000	4,687	1,812
Donations from individuals	2,511	-	2,511	6,093
Community fundraising	4,513	-	4,513	6,540
Events & training	-	-	-	-
<b>Total receipts</b>	<b>19,729</b>	<b>81,045</b>	<b>100,774</b>	<b>57,806</b>
<b>Payments</b>				
Session costs - musicians	3,190	14,406	17,596	-
Marketing & Website	31	1,247	1,278	433
Meeting costs	58	201	259	352
Travel costs	41	2,104	2,145	315
Musical equipment & music	261	5,111	5,372	1,699
Insurance	-	372	372	372
Project management costs	3,240	18,900	22,140	25,065
Stationery, printing & office costs	316	769	1,085	1,236
Funding bids & fundraising	884	-	884	823
Training costs	280	1,506	1,786	60
Community involvement activities/volunteer management musicians	1,176	15,577	16,753	37,578
Venue costs	396	1,326	1,722	51
Volunteer costs & DBS checks	48	96	144	92
Covid self isolation payment	378	-	378	-
Consumables, repairs & renewals	115	454	569	-
Independent examination	300	-	300	-
Self evaluation	-	-	-	352
Miscellaneous expenses	61	70	131	313
<b>Total payments</b>	<b>10,775</b>	<b>62,139</b>	<b>72,914</b>	<b>68,741</b>
<b>Net of receipts/(payments)</b>	<b>8,954</b>	<b>18,906</b>	<b>27,860</b>	<b>(10,935)</b>
<b>Transfers between funds</b>	<b>(34)</b>	<b>34</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>27,539</b>	<b>24,806</b>	<b>52,345</b>	<b>63,280</b>
<b>Balance carried forward</b>	<b>36,459</b>	<b>43,746</b>	<b>80,205</b>	<b>52,345</b>

**Musical Connections**  
(Charity Number: 1165993)

<b>Statement of assets and liabilities at:</b>	<b>31st March 2022</b>
--	------------------------

	Unrestricted funds £	Restricted funds £	2022 Total funds £	2021 Total funds £
<b>Assets</b>				
Current bank account	36,315	43,746	80,061	52,340
Petty Cash	144	-	144	5
	<u>36,459</u>	<u>43,746</u>	<u>80,205</u>	<u>52,345</u>

	Fund	Cost £	Current value £
<b>Assets retained for charity's own use</b>			
<b>Details</b>			
3 x Keyboard	Unrestricted	300	150
1 x Keyboard	Life Less Lonely	155	50
Large amp	Unrestricted	150	50
Portable amp	Robert McAlpine	160	50
Portable amp	Life Less Lonely	149	50
3 x ipod touch	Freemasons	597	150
Loop station	Unrestricted	135	20
Chime bars	Freemasons	260	100
Chime bars	Unrestricted	260	100
Chime bars	Micklegate Ward	127	100
Projector & case	Unrestricted	612	50
Portable speaker	Unrestricted	160	50
2 x camera	Unrestricted	379	100
Notebook	Freemasons	299	150
2 x tablet	Unrestricted	200	160
45 x tablets	Awards for All	4,455	4,455

	Unrestricted funds £	Restricted funds £	2022 Total funds £	2021 Total funds £
<b>Liabilities</b>				
Independent examination fee	300	-	300	300
	<u>300</u>	<u>-</u>	<u>300</u>	<u>300</u>

**Musical Connections**  
(Charity Number: 1165993)

**Notes to the accounts for the year ended:**

**31st March 2022**

**1. Basis of accounts**

The Trustees have taken advantage of section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

**2. Restricted income funds**

Where funds were originally granted for face to face work, funders kindly allowed their grants to be re-deployed to support Covid - response activities.

<b>Fund name</b>	<b>Purpose</b>
Derwenthorpe Community Fund	For hire of a venue for the Rolling Tones
Wharfedale Foundation	For intergenerational work ('Generations in Harmony')
Masonic Charitable Foundation	Final instalment of a 3-year grant to help sustain and develop our work. The grant comes with a strong focus on active co-operation, with a view to increasing and sharing learning
Jack Brunton Charitable Trust	A grant towards core costs
HDH Wills 1965 Charitable Trust	Funding towards venue hire for Honeysuckle Singers
Ashley Family Foundation	Second instalment of a 2-year grant towards core costs for 'Communities in Harmony'
Liz & Terry Bramwell	Grant supporting post-Covid resumption of in-person activities
Ways to Wellbeing York CVS	A grant to aid the start-up of a new music group linked to York Medical Group's Monkgate surgery
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The report and accounts were approved at a meeting of the Trustees held on:

27/7/22  
Date

JF — st  
Signed for and on behalf of the trustees

27/7/22  
Date

J FARRINGTON  
Print name

TREASURER  
Position (e.g. Chair etc)

# **Musical Connections**

(Charity Number: 1165993)

## **Trustees Annual Report & Financial Statements for the year ended**

**31st March 2022**

# **outsourc**e

Charity accounts preparation &  
independent examination service

# **Musical Connections**

(Charity Number: 1165993)

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# Trustees' Annual Report

**From:** 1st April 2021

**To:** 31st March 2022

**Charity's full name** Musical Connections

**Registered Charity number** 1165993

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- 4 in City of York Council's sheltered housing schemes
- 1 in a private care-home
- 3 in partnership with York Medical Group - as we were no longer able to run these groups in YMG surgeries, we found alternative venues for them in the wider community
- 2 community choirs

As the year wore on, members from across all of the groups also took part in an increasing number of intergenerational and community-based events. Free transport was provided for anyone who needed it.

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- Created video recordings, some of which were intergenerational collaborations.
- Secured funding from the National Lottery's Awards for All programme to purchase a stock of tablets for use by members and to run a 6-month training programme aimed at enabling them to participate in recordings and online activities and to access a bank of Musical Connections online material.

The trustees consider that they have complied with their duties to have due regard to the public benefit published by the Charity Commission.

## **Achievements and performance**

### **Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.**

In the first half of the financial year 2021-22, we managed to run 35 outdoor and 'on the road' sessions (some of which were live-streamed to a wider audience) with 70 beneficiaries. Between September 2021 and March 2022, we ran a total of 219 in-person sessions and events involving 213 older, vulnerable and isolated beneficiaries who totalled over 2,200 attendances between them. Of these activities:

- 10 were intergenerational workshops, events and concerts where group beneficiaries made music with children and young people from local schools and universities
- 6 were community-based events involving members singing at a local market, a supermarket, a city centre fundraiser and events involving an additional 60 people from an Age UK day club and several local authority housing schemes
- 4 were radio sessions

By the end of the year, we had worked with a total of 273 older, vulnerable and isolated people, and over 250 children and young people.

111 beneficiaries completed feedback questionnaires over two tracking phases in October 2021 and March 2022, with the following findings:

- 99% said going to their Musical Connections session improved their mood on the day (94% said greatly)
- 100% said going to their group helped them to feel happier and more positive about life (84% said greatly)
- 95% said that taking part improved their confidence (60% said greatly)
- 89% said their physical wellbeing was improved
- 99% said they felt greater satisfaction with their lives
- 98% said going to their group improved their alertness and activity levels
- 98% said it gave them a sense of purpose and something to look forward to
- 95% said it enabled them to make increased contact with other people
- 96% said they had made new friends through their group
- 100% said they considered themselves to be a valued member of the MC Family (60% said greatly)
- 95% said their overall wellbeing was improved

We have been aided in our achievements by a total of 38 volunteers who have:

- worked as 'music buddies' at weekly sessions, supporting group members and musicians
- provided members with transport to sessions
- stayed in phone contact between sessions with especially vulnerable members

Excellent relationships with many project partners have also been instrumental to our success. NHS social prescribers and the council's community teams have made regular referrals, and York Medical Group has continued to promote our work to their patients. Two local radio stations, Yorkmix and YO1 Radio, have enabled us to enjoy a strong radio presence across the city, and we are delighted that a Yorkmix presenter has formally accepted the role of 'Musical Connections ambassador'.

More details on our achievements and the wider impact of our work may be found in our Annual Report.

## Financial review

### Review of the charity's financial position at the end of the period

At the end of the 2021/22 financial year, Musical Connections had been in receipt of £100,774 and made payments of £72,914 leaving a surplus balance of £27,860 for the year. This balance can be split into unrestricted and restricted as follows: a £8,954 surplus in unrestricted versus a £18,906 surplus in restricted grant income. When this surplus is added to the carried forward balance from 2020/21 (£52,345), this leaves Musical Connections with a total balance of £80,205 at the end of the financial year, split into an unrestricted fund of £36,459 and £43,746 restricted funds.

### Statement explaining the policy for holding reserves stating why they are held

Musical Connection's Reserves Policy, approved by Trustees in July 2021, states that the charity should hold a maximum of £40k in reserves. This level of reserves was set after careful consideration of all the potential reasons reserves would be needed e.g. to aid cash flow, contingency planning to mitigate against unexpected expenditure, to commit designated funds to expenditure not covered by annual income and finally the closure of the charity. After due consideration of all these potential calls on reserves, it was determined that Musical Connections would need to hold a range of reserves between £9.5k and £40k. The trustees took the decision that they needed to protect the beneficiaries in the event of it having to cease its operation and therefore the figure of £40k was agreed upon. This level of reserves would protect the charity's beneficiaries, who are the most socially isolated and vulnerable adults and enable it to wind down its operation in a sustainable way, rather than abruptly withdraw its services which would have a detrimental impact on their quality of life.

### Amount of reserves held

At the end of 2021/22, the amount of reserves held was £36.5k. The Reserves Policy states that the maximum reserves held should be £40k, which at present reflects 50% of the core operational costs of running the sessions and an additional 10% to go towards paying for professional services that may need to be employed to aid closure. The ratio of reserves to net annual operating costs was 45:55 at the end of the financial year.

### Reasons for holding zero reserves

N/A

### Funds materially in deficit

N/A

### Explanation of any uncertainties about the charity continuing as a going concern

N/A

## Structure, governance and management

<b>Description of the charity's trusts</b>	N/A
<b>Type of governing document</b>	Constitution
<b>How the charity is constituted</b>	Charitable Incorporated Organisation
<b>Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees</b>	Clause 10.1 of our constitution states that 'apart from the first charity trustees', every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. Clause 10.2 states 'in selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective management of the CIO'.

**Reference and administration details**

Charity's full name Musical Connections

Other names the charity is known by N/A

Charity's principal address PO Box 724  
York  
YO1 0HL

**Names of the trustees who manage the charity**

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Val Sutton	Chair		
Jo Farrington	Treasurer		
Chris Bartram			
Hazel Brown			
Richard Frost			

**Name of trustees holding title to property belonging to the charity**

Trustee name	Dates acted if not for whole year
N/A	N/A

**Names and addresses of advisers (OPTIONAL)**

Type of adviser	Name	Address
Independent Examiner	Karen Wood ACMA, CGMA	Outsource Accountancy Services & Independent Examinations Hiscox Building, Peasholme Green YO1 7PR

Bankers Natwest Bank

**Name of chief executive or names of senior staff members**

N/A

**Declaration**

The trustees declare that they have approved the Trustees Annual Report and Accounts

Signed on behalf of the charity's trustees

Signature



Full Name Joanne Maria Farrington

Position Treasurer

Date 29/7/22

**Independent examiner's report to the trustees of Musical Connections**

I report on the accounts of: **Musical Connections**  
for the year ended: **31st March 2022** which are set out on pages 6 to 9.

**Responsibilities and basis of report**

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 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 material 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 Trust 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.

*K Wood*

**Karen Wood (ACMA)**  
Outsource independent examination  
service  
The Hiscox Building  
Peasholme Green  
York YO1 7PR

*9/9/22*

**Date:**

**Musical Connections**  
(Charity Number: 1165993)

<b>Receipts &amp; payments accounts for the year ending:</b>		<b>31st March 2022</b>		
	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>2022 Total funds</b>	<b>2021 Total funds</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Receipts</b>				
Session fees & contributions	9,018	-	9,018	1,071
Grants	-	80,045	80,045	42,290
Donations from organisations	3,687	1,000	4,687	1,812
Donations from individuals	2,511	-	2,511	6,093
Community fundraising	4,513	-	4,513	6,540
Events & training	-	-	-	-
<b>Total receipts</b>	<b>19,729</b>	<b>81,045</b>	<b>100,774</b>	<b>57,806</b>
<b>Payments</b>				
Session costs - musicians	3,190	14,406	17,596	-
Marketing & Website	31	1,247	1,278	433
Meeting costs	58	201	259	352
Travel costs	41	2,104	2,145	315
Musical equipment & music	261	5,111	5,372	1,699
Insurance	-	372	372	372
Project management costs	3,240	18,900	22,140	25,065
Stationery, printing & office costs	316	769	1,085	1,236
Funding bids & fundraising	884	-	884	823
Training costs	280	1,506	1,786	60
Community involvement activities/volunteer management musicians	1,176	15,577	16,753	37,578
Venue costs	396	1,326	1,722	51
Volunteer costs & DBS checks	48	96	144	92
Covid self isolation payment	378	-	378	-
Consumables, repairs & renewals	115	454	569	-
Independent examination	300	-	300	-
Self evaluation	-	-	-	352
Miscellaneous expenses	61	70	131	313
<b>Total payments</b>	<b>10,775</b>	<b>62,139</b>	<b>72,914</b>	<b>68,741</b>
<b>Net of receipts/(payments)</b>	<b>8,954</b>	<b>18,906</b>	<b>27,860</b>	<b>(10,935)</b>
<b>Transfers between funds</b>	<b>(34)</b>	<b>34</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>27,539</b>	<b>24,806</b>	<b>52,345</b>	<b>63,280</b>
<b>Balance carried forward</b>	<b>36,459</b>	<b>43,746</b>	<b>80,205</b>	<b>52,345</b>

**Musical Connections**  
(Charity Number: 1165993)

<b>Statement of assets and liabilities at:</b>	<b>31st March 2022</b>
--	------------------------

	Unrestricted funds £	Restricted funds £	2022 Total funds £	2021 Total funds £
<b>Assets</b>				
Current bank account	36,315	43,746	80,061	52,340
Petty Cash	144	-	144	5
	<u>36,459</u>	<u>43,746</u>	<u>80,205</u>	<u>52,345</u>

	Fund	Cost £	Current value £
<b>Assets retained for charity's own use</b>			
<b>Details</b>			
3 x Keyboard	Unrestricted	300	150
1 x Keyboard	Life Less Lonely	155	50
Large amp	Unrestricted	150	50
Portable amp	Robert McAlpine	160	50
Portable amp	Life Less Lonely	149	50
3 x ipod touch	Freemasons	597	150
Loop station	Unrestricted	135	20
Chime bars	Freemasons	260	100
Chime bars	Unrestricted	260	100
Chime bars	Micklegate Ward	127	100
Projector & case	Unrestricted	612	50
Portable speaker	Unrestricted	160	50
2 x camera	Unrestricted	379	100
Notebook	Freemasons	299	150
2 x tablet	Unrestricted	200	160
45 x tablets	Awards for All	4,455	4,455

	Unrestricted funds £	Restricted funds £	2022 Total funds £	2021 Total funds £
<b>Liabilities</b>				
Independent examination fee	300	-	300	300
	<u>300</u>	<u>-</u>	<u>300</u>	<u>300</u>

**Musical Connections**  
(Charity Number: 1165993)

**Notes to the accounts for the year ended:**

**31st March 2022**

**1. Basis of accounts**

The Trustees have taken advantage of section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

**2. Restricted income funds**

Where funds were originally granted for face to face work, funders kindly allowed their grants to be re-deployed to support Covid - response activities.

<b>Fund name</b>	<b>Purpose</b>
Derwenthorpe Community Fund	For hire of a venue for the Rolling Tones
Wharfedale Foundation	For intergenerational work ('Generations in Harmony')
Masonic Charitable Foundation	Final instalment of a 3-year grant to help sustain and develop our work. The grant comes with a strong focus on active co-operation, with a view to increasing and sharing learning
Jack Brunton Charitable Trust	A grant towards core costs
HDH Wills 1965 Charitable Trust	Funding towards venue hire for Honeysuckle Singers
Ashley Family Foundation	Second instalment of a 2-year grant towards core costs for 'Communities in Harmony'
Liz & Terry Bramwell	Grant supporting post-Covid resumption of in-person activities
Ways to Wellbeing York CVS	A grant to aid the start-up of a new music group linked to York Medical Group's Monkgate surgery
Whitwam Family Charitable Trust	Grant towards core costs
Brelms Trust	Second instalment of a 3-year grant to deliver music groups and intergenerational activities
Awards for All	Grant for a digital inclusion project aimed at enabling MC members to use tablets during and between weekly music sessions
Betty's & Taylor's Group	Funding to enable a 'step change' towards increased sustainability for MC by supporting volunteer recruitment, expanded online provision and project management training
Coronavirus Community Fund issued by Two Ridings Community Foundation	
Magic Little Grants	Funding for outdoor music sessions during Summer 2021
Westfield Ward	A grant towards re-starting in-person sessions at Gale Farm Court independent living community
Hobson Charity	Funding to enable us to provide free beneficiary transport
Headley Trust	Grant towards core costs
Evan Cornish Foundation	Grant towards core costs
Garfield Western Foundation	First year of a (second) 3-year grant towards core costs
Arts Council England	First instalment of a grant to support: the resumption of weekly, in-person music groups and intergenerational activities; the inclusion of digital/online activities; significant organisational development
Purey Cust Trust	Funding for the resumption of Acomb Singers' in-person sessions
Headley Trust (2)	Grant towards core costs
Postcode Neighbourhood Trust	Grant towards resumption of The Rolling Tones Community Choir

	Balance b/fwd £	Income received £	Resources expended £	Transfer of funds £	Balance c/fwd £
<b>Total Unrestricted</b>	<u>27,539</u>	<u>19,729</u>	<u>10,775</u>	<u>(34)</u>	<u>36,459</u>
Derwenthorpe Community Fund	293	-	293	-	-
Wharfedale Foundation	2,000	-	640	-	1,360
Masonic Charitable Foundation	2,795	3,594	6,389	-	-
Jack Brunton Charitable Trust	2,000	-	2,000	-	-
HDH Wills 1965 Charitable Trust	500	-	430	-	70
Ashley Family Foundation	5,000	5,000	8,430	-	1,570
Liz & Terry Bramwell	5,000	-	5,001	1	-
Ways to Wellbeing York CVS	2,218	-	2,219	1	-
Whitwam Family Charitable Trust	5,000	-	5,001	1	-
Brelms Trust	-	5,000	3,555	-	1,445
Awards for All	-	9,990	6,760	-	3,230
Betty's & Taylor's Group Coronavirus Community Fund issued by Two Ridings Community Foundation		5,000	5,000	-	-
Magic Little Grants		500	500	-	-
Westfield Ward		500	500	-	-
Hobson Charity		5,000	2,079	-	2,921
Headley Trust		1,000	1,031	31	-
Evan Cornish Foundation		5,000	5,000	-	-
Garfield Western Foundation		10,000	2,541	-	7,459
Arts Council England		17,361	113	-	17,248
Purey Cust Trust		1,684	830	-	854
Headley Trust (2)		5,000	2,208	-	2,792
Postcode Neighbourhood Trust		6,416	1,619	-	4,797
<b>Total Restricted</b>	<u>24,806</u>	<u>81,045</u>	<u>62,139</u>	<u>34</u>	<u>43,746</u>
<b>Total Funds</b>	<u>52,345</u>	<u>100,774</u>	<u>72,914</u>	<u>-</u>	<u>80,205</u>

#### Transfer between funds

Funds have been transferred from unrestricted funds to various overspent restricted funds,

**Approval of accounts for the year ended: 31st March 2022**

The report and accounts were approved at a meeting of the Trustees held on:

27/7/22  
Date

JF — st  
Signed for and on behalf of the trustees

27/7/22  
Date

J FARRINGTON  
Print name

TREASURER  
Position (e.g. Chair etc)

**MUSICAL CONNECTIONS**

England & Wales - Charity number 1165993

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# Accounts

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# REPORT OF THE TRUSTEES AND UNAUDITED FINANCIAL STATEMENTS

20<sup>TH</sup> APRIL 2021

**Reg. Charity No: 1165993**

T: 01904 373011

E: [enquiries@musicalconnections.org.uk](mailto:enquiries@musicalconnections.org.uk)

W: [www.musicalconnections.org.uk](http://www.musicalconnections.org.uk)



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# ORGANISATIONAL DETAILS

**Type of Charity:** Musical Connections is a CIO (a Charitable Incorporated Organisation).

**Charity Registration Number:** 1165993

**Date of Registration:** 10<sup>th</sup> March 2016

**Postal Address:** PO Box 724, York, YO1 0HL

**Trustees:**

- Valerie Sutton (Chair)
- Jo Farrington (Treasurer)
- Chris Bartram
- Hazel Brown
- Richard Frost

**Bank:**

- NatWest
- City Centre Branch
- 1 Market Street
- York YO1 8SR

**Accountants:**

- Outsource
- 29 Millfield Road
- York, YO23 1NH

Over the last year, our project team has consisted of a Project Director, who is also a musician, and 3 more self-employed musicians, supported by an active Board of Trustees.

# GOVERNANCE

## Election of Charity Trustees

Clause 10.1 of our constitution states that ‘apart from the first charity trustees, every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees’. Clause 10.2 states: ‘In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO’.

## Additional Governance Information and Organisational Structure

Musical Connections’ board of trustees is stable, experienced, and very active, bringing together a range of skills and expertise. Our Chair was previously Group Manager of Adult Services for City of York Council, and brings extensive experience in managing and delivering care for older people. She is ably supported by the rest of the trustee board, which includes a retired GP, a former marketing manager, a former senior music lecturer from York St John University and a retired chartered engineer, who is also one of our choir members, enriching the board with his experience as a project beneficiary. Together the board is well equipped to provide oversight and guidance for the project.

Our Project Director/Lead Musician has led the Musical Connections project since its inception and has over 14 years’ experience of leading participatory music in care and community settings. She leads a small team of self-employed musicians who are highly trained and experienced in working with vulnerable older people who have a range of needs, interests and abilities.

At the start of the financial year, our Community Involvement Officer left the team. Given the changed model which we were delivering during the pandemic, the team’s remaining members were able to take on community involvement responsibilities between them, to great effect. The Project Assistant, who joined us the previous year, also stepped up to take on additional responsibilities, which meant that the team was able to deliver to a very high standard throughout the pandemic. Skills and ideas developed in the face of the enormous challenges posed by the Covid-19 virus are now being incorporated into our project, enabling us to expand our provision and increase our sustainability.

## **Risk Management**

The Board of Trustees considers that they have complied with their duties to have due regard to the public benefit guidance published by the Charity Commission, and work collectively to review risks, systems and procedures on a regular basis. One of our trustees has particular responsibility for Health and Safety and our Chair is the named person responsible for safeguarding.

# BACKGROUND, OBJECTIVES AND SUMMARY

## Background and Context

Unsurprisingly, the work of Musical Connections during 2020-21 has been dominated by the coronavirus pandemic. Prior to Covid-19, the charity had been growing and evolving, increasing its impact and profile year on year, perhaps most notably in relation to social prescribing. As a consequence, we had become increasingly well-respected within the York community for our ability to deliver positive outcomes for the health and wellbeing of an increasing number of vulnerable and isolated older people.

With the advent of the pandemic, and the ensuing lockdown restrictions, we had no choice but to suspend all of our weekly music groups, choirs, and intergenerational activities. Understandably, many of our regular members were fearful of the virus and of their enforced isolation and asked us to stay in contact with them. With no possibility of supporting them face-to-face, we set about converting our work to a mix of social support and musical engagement, delivered both on- and off-line. The vast majority of our funders were fully supportive of these arrangements which, despite being very different to our usual model, enabled us to continue delivering on our charity's objectives, as set out below.

## Objectives

- To advance the wellbeing of vulnerable and socially isolated older people
- To relieve isolation and social exclusion amongst vulnerable people
- To provide opportunities for vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

## Main Activities

In place of our weekly music groups, choirs, and face-to-face intergenerational activities, we carried out a range of on- and off-line activities throughout the year, to help our members stay connected and to enable them to continue engaging in music. We:

- Made welfare calls at least once a week to over 65 members (at one point, it was 85). 46 of these call recipients did not have internet access and so could not participate in our online activities, while the others either found it quite difficult to engage digitally, or were particularly isolated and wanted to hear a human voice at the end of a phone in addition to digital contact
- Sent emails several times a week to 83 members who did have internet access - the messages included news, updates and links to musical recordings, concerts, and activities. Some members started sending in photos and jokes and these were included in ongoing 'conversations' with our online community
- Sent letters, postcards, and photos approximately once a month to people who weren't online
- Undertook projects and interviews with local media to communicate with and involve members
- Carried out socially distanced visits and doorstep singing - entitled 'MC on the Road' - when restrictions allowed. Please follow the links to see short videos of our summer and Christmas 'on the road' projects:
  - <https://youtu.be/oAxB7zbltx4>
  - <https://youtu.be/rON98HEttCg>
- Delivered Regular Facebook Live ('Singstream') and 'Zoom' singing sessions for participants who had internet access - we used our phone calls to help people get connected if they had technology at home that they previously didn't know how to use and produced a step-by-step 'Zoom download' manual for members. These online sessions were attended by around 20 members, plus volunteers and university students and links were made available to enable others to 'catch up' afterwards
- Ran projects with students from both of York's universities, who created music and videos for and with our beneficiaries, including song-writing using lock-down related lyrics suggested by members during phone calls and online sessions
- Created group video recordings and intergenerational concerts - please follow the link to hear a version of Louis Armstrong's 'What a Wonderful World', which combines 30 individual voice-recordings and a photo slideshow of 'behind-the-scenes' shots of our musicians out 'on the road': [https://youtu.be/JH-a\\_gYYWsw](https://youtu.be/JH-a_gYYWsw). And here is a recording of 'I Can See Clearly Now' created with Zoom group members, volunteers, and local students, which featured in our virtual Spring concert: <https://youtu.be/FAmG87bNReE>

- These videos were downloaded onto DVD/CD, along with some of the internet-based sessions, and sent to 36 group members who were not online but did have DVD players - we also purchased DVD players for a handful of members who did not have one, so that they didn't miss out
- Set up a pen-pal project
- Held fortnightly Zoom coffee mornings
- Created a CD, entitled 'Our Musical Family', using recordings from members, students, Musical Connections musicians and even some local GPs
- Held regular 'song raffles'
- Ran a small pilot project introducing tablets to a handful of beneficiaries (see below for more detail)
- Delivered a hectic Christmas programme, which, in addition to the 'Carols on the Road' and a virtual intergenerational Christmas concert, involved:
  - An online advent calendar, which included musical or other creative contributions from members and local schoolchildren/students
  - A Musical Connections Christmas card, which was sent to everybody
  - Additional Christmas cards and a small music-themed Christmas decoration for our 20 most extremely isolated members
  - A video message from the MC musicians on Christmas Day

## 2020/21 AT A GLANCE

During this period, we supported and involved 200 vulnerable older people who were previously regular members of our weekly music groups and choirs. We also involved around 15 students from both of York's universities, as well as almost 200 children from 7 local primary and secondary schools.



Delivered **85** online sessions and activities



Produced **3** virtual intergenerational concerts and **33** song videos



Visited **110** members, volunteers, and sheltered housing tenants to sing on their doorsteps



Posted **290** CDs/DVDs to 36 members not online



Sent over **1,000** postcards, greetings cards and newsletters

# IMPACT ON PARTICIPANT WELLBEING

97 beneficiaries completed feedback questionnaires during two tracking phases (October and March) over the course of the year. Their responses suggest that the work we have done to support them through this very difficult year has had a significant positive impact on their wellbeing, helping to reduce the effects of their enforced isolation and providing a sense of connection and purpose. In actual fact, despite the length of time that we have all been separated from each other, it seems that, for many, our musical community is stronger and closer than it was before.



**97%** said that they are **very satisfied** with the **support and communication** that they have **received** from Musical Connections:

*'When people ask how I am, I always tell them that I've got this amazing choir that I belong to who are always checking up on us - we know you're there if we need you'*

*'It's been great. They have provided every opportunity for contact with others and practical support as well as an opportunity to sing and have fun. I found the list of local shops which delivered food during lockdown particularly helpful and passed on the information to many other people'*

*'VERY, VERY, VERY SUPPORTIVE! Ever since I met you that day in the car park me life's changed! It was fate! I can't believe that happened! Without you guys, I'd be a sad, sad man.'*

**94%** said that this had helped to improve or increase their social contact (65% said greatly):

*'I'd only been a member of the choir for 6 weeks before lockdown, but it's been amazing, and I've been able to get to know a group of people that I wouldn't have been able to make contact with. I didn't really know anybody and now I feel I know a large group and know them very well too!'*



*'We seem to have met more people this year via MC than in a normal year as they have included other groups we did not know about'*

**87%** said that the activities we have offered have helped them to continue to engage in music with others (55% said greatly):



*'I have missed the weekly sessions so very much, but still being able to learn new songs gives you a sense of wellbeing and achievement'*

*'MC has enabled me to engage in different musical activities. Participating in the videos and concert has given me enjoyment and focus. My confidence has increased, and I have recorded myself singing and playing on my own - something that I have never done before'*

*'I've really enjoyed singing on Zoom and taking part in the various projects. Without it I doubt I would have sung regularly at all, and I always feel so much better for having done so.'*



Despite the restrictions, **82%** said they now know the MC team better than before, and **79%** said they know other MC members better than before:



*'All members of the team are so generous and friendly. I hadn't met Abby and Emma before lockdown, and Charlotte only a few times. I definitely feel I know the team better than before, and hope they feel they know us better too.'*

*'I feel like I've made some friends - real good friends! They are a dedicated and professional team who really care.'*

*'I have loved getting to know the team more, and other members - MC feels like a big family'*

Where people had had connections with other organisations, **88%** said that MC had made greater efforts than any of them to keep people connected:

*'I've never known a group care so much - it's lovely to belong - I haven't had the same care from any other group'*

*'If other organisations were to offer the same as MC the world would be a better place'*

*'Their efforts have been amazing. The only group which has been in touch regularly and the only group which has provided practical help as well as continuation of activities online should I have wanted to use them.'*



98% of 84 members interviewed in Spring (this question wasn't asked previously) said being involved with MC has reduced feelings of isolation (49% said **greatly**):

*'MC do not allow you to feel isolated, they spread so much love and caring among them to us all and in ways that suit each person, not everyone is good with computers!'*

*'If I'd never joined the group, I don't think I'd have gone anywhere or spoken to you during lockdown. I don't know a lot of people since I moved into this new place, but I can talk to you.'*

*A lot of people that are introverted or lonely, it gives them something to hang on to and look forward to going back to in the future. Someone that might not have any family, it might be the only person that they hear from... it's a necessary lifeline.'*

100% of Spring respondents said our work had improved their sense of belonging to a community (60% said **greatly**):

*'Musical Connections gives everyone a purpose in life. Especially those who live alone when MC is their only means of contact with the outside world.'*

*'The girls have been amazing, always in good spirits smiling & laughing with everyone, it has been the mainstay of our mental health, to know they are always there for a chat & a regular fixture in the diary. Many a week the "ONLY" thing in our diary!!!!!!!'*

*'Musical Connections is my family, and I just can't thank each member of the team enough'*

98% of Spring respondents said the work we have done has helped to improve their wellbeing (49% said **greatly**):

*'It cheered us up and made Christmas more bearable. It has also greatly helped my husband's 'vulnerable' isolation, as he has been busy - it was almost his only other visual contact with the outside world'*

*'Without a shadow of a doubt this wonderful group of people have made me feel better when I have been down'*



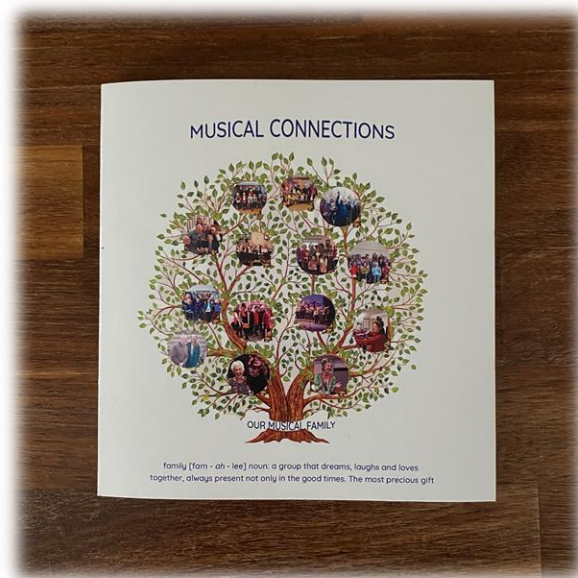
*'The visits from you and Abby were really helpful and especially for me, the principal carer, it bolstered my morale during the lockdown period and that's so important.'*

Musicians and members alike now refer affectionately to **'Our Musical Family'**.

*'Musical Connections was my lifeline. The team leaders have been so good to me in many ways, music being the main. We are more of a close family.'*

*'All I can say is, that I am so glad I became a part of this wonderful family. I would hate to think how I could have coped without them.'*

*'I feel that Musical Connections is not just a choir, it's a family.'*



Please follow this link to watch a 7-minute Q&A with one of our members, Stan, in which he talks about how Musical Connections have helped him through the course of the pandemic: [https://youtu.be/G\\_3F-Bolt9g](https://youtu.be/G_3F-Bolt9g)

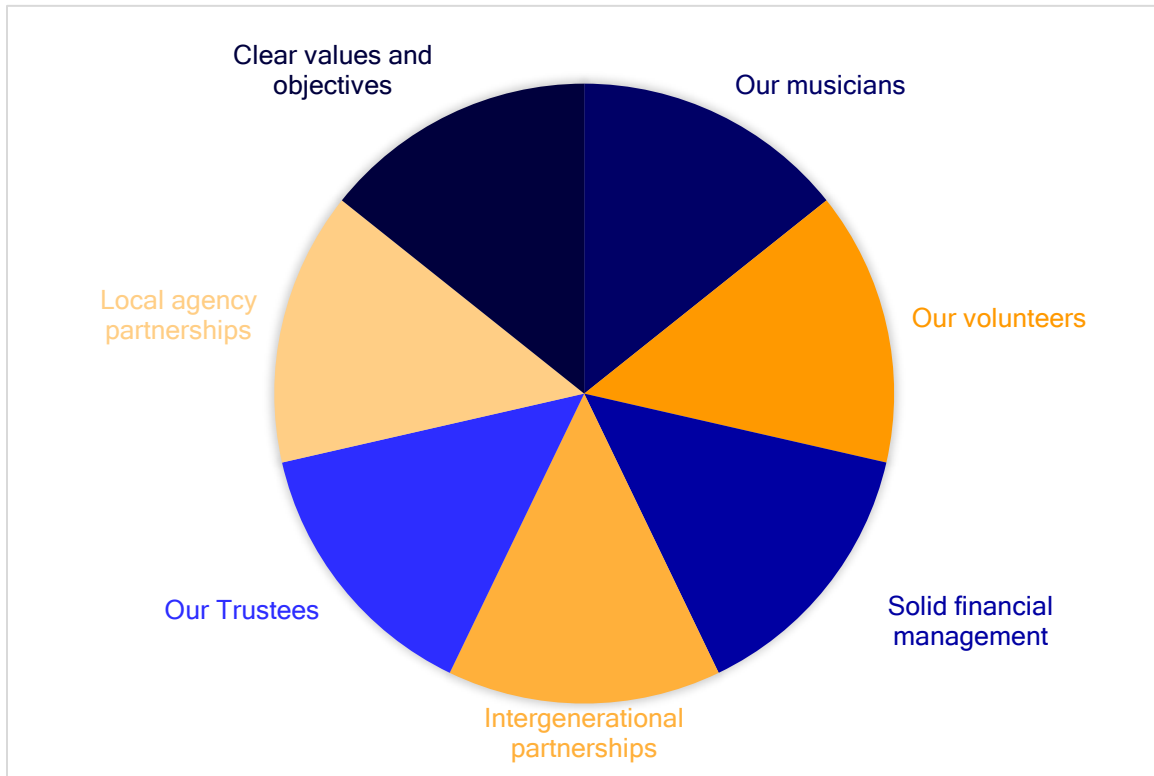
While we were unable to receive individual responses from the care-home residents who have accessed our online activities, the support worker who has helped them to participate gave the following feedback:

*'The residents at Ebor Court love Musical Connections and have been enjoying the virtual sessions since the lockdown just as much as the face-to-face sessions pre-lockdown. They feel connected and a part of what is happening outside by being able to take part...Musical Connections have made more effort than others by far and have really strived to keep that connection going over the past few months. They were on it right from the beginning, and we look forward to the day when we can have them back in the home'*



# MUSICAL CONNECTIONS' MAGIC INGREDIENTS

Achieving this level of impact despite the limitations of coronavirus restrictions, can be attributed to a combination of the following factors:



## IN MORE DEPTH:

### Creative, Skilled and Dedicated Musicians

In normal circumstances, the relationships between session leaders and their group members are crucial to the impact of our work. During the coronavirus pandemic, this has been even more important. From the very start of the year, when members asked us to stay in touch with them, the musicians have done everything possible to sustain positive and meaningful relationships with their members. Through their regular, varied, and creative communications, these relationships have strengthened and deepened, to the point where we now refer to ourselves as 'Our Musical Family', and even produced a 'family photo album' which was sent out to members.

Alongside the musicians' huge efforts to provide emotional and social support, lockdown restrictions necessitated a complete transformation of our musical offering, in order to enable members to continue participating. Out of necessity, the musicians began to develop new skills and mined their significant reserves of creativity to come up with one innovative idea after another. Despite the obvious challenges of the pandemic, it became apparent that it was an unexpected opportunity for the musicians to develop their skill set and to create new ways of working, which have, in many ways, transformed us as a charity.

*'The whole staff have worked very hard and with skill to help everyone feel involved and part of the activities, sometimes coming up with some novel ideas'*

*'Musical Connections has made an extraordinary effort, it's clear that it has been the result of team action, and lots of creative thinking behind it.'*

*'Musical Connections has worked tirelessly and with skill to keep its members connected, and the positivity of the team and the opportunities to see others on the Zoom Choir has been hugely appreciated. The cheerfulness coming through from the team and others has been consistently refreshing.'*



It must be emphasised that, in their dedication to the charity and its members, each musician put in a great deal of unpaid time and commitment to ensure that, in this new environment, the quality of their work was undiminished and, in actual fact, enhanced.

## A Reliable, Supportive and Growing Volunteer Team

We have received incredible support from 22 volunteers this year:



Helped with welfare  
calls and deliveries



Students got involved  
in our musical activities



Publicised our work  
on social media

In seeking to avoid lockdown fatigue amongst our existing team and with an eye on the need for ongoing support as we gradually resume our face-to-face work, we conducted a new volunteer recruitment campaign. This was incredibly successful - we were deluged with offers, and actually had to remove the adverts because we could not accommodate the number of people who approached us. Consequently, we welcomed 15 new volunteers to the team, many of whom intend to continue with us as we re-start our groups. It is clear that the contributions they have made to our work have also positively benefited them.

In questionnaires conducted with 14 volunteers, 13 said that volunteering had **helped to improve their wellbeing** during the pandemic:

*'I am enjoying being in contact with the new people I have met through MC; I feel less lonely, and everyone is so lovely.'*

*'It has made me feel valuable and needed in a time when my head was not in the best place.'*

*'During the lockdown, it's sometimes difficult to fill the day. Knowing I have guitar lessons and (Zoom) meetings midweek keeps me motivated to play guitar and it's nice to see the impact that the meetings have on the people involved'*



**ALL** said it had given them a **sense of purpose** (11 said **greatly**):

*'In a time where so many people are struggling, I have really appreciated chatting with the lady who I call and giving her someone new to talk with and having a laugh.'*

*'From the comments I have received from members, I know my phone calls are appreciated - also when I shopped for a group member, they were very grateful.'*

**13** said it had given them **increased social contact** (9 said **greatly**):

*'I've met lots of new people over Zoom, which has extended my social circle and been lovely. I'm a university student so it makes a nice change to talk to a different group of people, rather than just those on my course, and my family.'*

**ALL** said they were **very happy with the communication and support** from the team:

*'Constant support and contact with Charlotte, Abigail. and Fiona! Wonderful regular emails of information and pictures! The ladies have been very engaging, and I can see the positivity and joy they bring to other members of MC.'*

**ALL** said it had increased their sense of **belonging to a community** (11 said **greatly**):

*'I have really enjoyed being part of a community and having chats with the members - everyone has been so welcoming and kind. It has helped with my confidence and has made me feel more connected during lockdown'*

12 said it is very likely that they will **continue to volunteer** with us when things return to normal (2 said 'possibly').

## Solid Financial Management

Over the course of the year, we lost £15,000 in anticipated income from participant donations at weekly sessions. At the same time, our beneficiaries needed an increased level of support from us. Against all odds, we managed to end the year in a reasonably strong position, thanks to three key reasons:

- Flexible and supportive funders
- The emergence of Covid-19 response funding
- An uplift in income from community fundraising

We began the financial year with a significant amount of funding already in place for the year ahead. However, given that this funding was intended to support our core face-to-face work, we had concerns that we would not be permitted to use it for Covid-19 response activities. We need not have worried - all of our funders were entirely supportive of a re-deployment of the funds, and some even contributed additional amounts as the year progressed. In addition, a number of new funding streams became available to support charities like ours, which were stepping up to provide additional support to their members during the coronavirus crisis. Not only that, but many of them reduced their reporting requirements, so as to make the evaluation process less onerous at a time when we were working so hard to meet the immediate needs of our beneficiaries.

It was enormously reassuring to experience such flexibility and support from these funders, several of whom, such as the Joseph Rowntree Foundation, the Two Ridings Community Foundation, and the National Lottery, went the extra mile in providing information and guidance intended to help us look towards an uncertain future with a greater degree of confidence than might have been expected.

In addition to the immense amount of work undertaken with funders, our members and community supporters stepped up to provide a level of contribution that we had never seen before. Aware of our loss of income in the face of everything we were doing, they rewarded us by making spontaneous donations and engaging with all of our online fundraising events.

## Ongoing Relationships with Intergenerational Partners

Intergenerational activities have been a hugely important part of Musical Connections' work for many years now, and this was something else that had to be adapted in the face of coronavirus. Thankfully, despite the significant pressures faced by local schools, several of them continued to involve themselves in our work, albeit at a reduced level. Several local schools contributed to our Christmas and Spring virtual concerts, while others made recordings to share with a care-home and for inclusion in our digital advent calendar. A pupil from Harrow School has been attending our online Zoom sessions and making calls to a couple of our members on a regular basis, and students from both of York's universities also got involved in a range of activities i.e.:

- Writing songs using lyrics created by members over the phone
- Creating pre-recorded concerts
- Participating in music videos alongside members
- Making telephone calls



We know that the work the students did with us was not only beneficial for our members but also for the students themselves, given that their university experience had been severely disrupted. Just like our members, it gave them a rare opportunity to make music with others, to connect with the wider community, and to feel a sense of purpose and positivity at a time when their options were so limited.

*'MEG have always loved being involved in Musical Connections normal sessions, so it has been great to still share the enjoyment of making music with their members when we can't be in person. Getting together on zoom was wonderful fun and it was lovely to meet even more MC members and actively see how much they appreciate all that MC do.'*

*'I feel much more integrated into the community now. I'm a student, but volunteering has made me feel like York will really become my second home, and one things are back 'in person', I will be very welcomed in the city, by the people who live there.'*

## **Steadfast and Supportive Board of Trustees**

In the same way that the Musical Connections musicians and volunteers stepped up to meet the challenges of the pandemic, so did our Board of Trustees. It was immediately agreed that, for the foreseeable future, meetings would take place on Zoom and all of the trustees continued to make themselves fully available, both for additional meetings and for ongoing advice and support while the team navigated the day-to-day challenges of working in an alien environment.

## **Meaningful Partnerships with Other Local Agencies**

During the crisis, we relied heavily on the support and guidance of York CVS. They championed the needs of local charities with vigour and determination, and worked closely with funders, acting as a conduit so that we had access to the most up-to-date information. They also provided understanding and reassurance and worked hard to capture our experiences so that they could advocate meaningfully on our behalf. It made an enormous difference to us to know that other people were working to help us remain afloat and optimistic about the future.

In terms of day-to-day project delivery, our partnership with York Medical Group continued to flourish. While an intended joint application to the National Lottery has had to be put on hold, we have nonetheless worked together in supporting their patients, and have been offered the use of the garden of one of their surgeries as an outdoor singing space.

Social prescribing link-workers from York Medical Group and other Primary Care Networks have referred people to us throughout the year, as have City of York Council's Local Area Co-ordinators and other departments with community-linked responsibilities. We have stayed in touch with OCAY (Older Citizens Advocacy York), and Age UK York, and all of our venue providers have assured us that our slots will remain available for us until we can return - none of them have charged us rent in the interim.

## **Clear Values and Objectives Shared by Everyone Involved**

When news of the virus began to emerge, it was clear that we would need to pull out all the stops to support our members, whose pre-existing isolation and vulnerability was thrown into even sharper relief when we realised that we would be facing lockdown restrictions indefinitely. However, given that this was a completely unprecedented scenario, thrust upon us with very little notice, we had no template to follow, and no agreed plans to fall back on. This posed a

threat to the stability of our team of musicians, trustees, and volunteers - we did not know whether we would all want to approach things in the same way, and whether we even had the resources to do so. Thankfully, it became apparent very quickly that, bar one musician who left the team in May, everyone on our team was strong, united, responsive, and prepared to take risks. The complete unfamiliarity of the situation left us very exposed but, we were all prepared to put in the effort, take a leap of faith, and allow for the implementation of untried and untested ideas.

Our flexibility and determination paid off. Our members received more support than they imagined possible, funders were prepared to contribute to what we were doing, and the team discovered and developed new skills and strengths which not only met a significant need during the pandemic, but which bode well for the future of our charity.

The shared values underpinning this success were:

- A clear appreciation that our longstanding commitment to reducing loneliness and improving wellbeing amongst vulnerable older people had never been more important
- An understanding that simple social support and practical help were as essential as musical participation at this time
- An appreciation that, in an unfamiliar and uncertain world, it was worth having a go at new things despite a lack of experience or training, and accepting that mistakes would be made e.g., Zoom singing sessions
- A determination that, despite the personal challenges of Covid-19, our team would remain optimistic and creative, both musically and practically
- A willingness to support each other, as well as our beneficiaries

## Digital Inclusion

Prior to the advent of the pandemic, only about a fifth of our regular members were accessing the internet. In the past, several members had received tablets or iPads as presents from family members but had not bothered to use them as they felt it would be too difficult and they simply could not see the point. They were perfectly content to communicate and access information and entertainment in the ways they had been using all their life and didn't believe that the internet had anything useful or interesting to offer them. This all changed when the virus struck - suddenly people could see that being online could give them access to the wider world despite lockdown restrictions.

We therefore set about helping our members to use the devices they had available to them, creating a 'Zoom manual' and giving advice over the phone, through windows or in gardens. As a consequence of this activity, the number of members able to access online activities more than doubled, to over 90 beneficiaries and volunteers.

Our online community went from strength to strength as the year wore on. Not only were members able to access our activities online, but we were able to communicate with them regularly and easily, and, through us, they were able to communicate with each other, despite GDPR precluding us from sharing contact details.

*'Singstream and Zoom sessions are great fun! I never imagined making videos of myself singing, but when I've seen the end result of a group of people singing together, it's so uplifting! I also love watching the team's weekly recording too.'*

*'A massive thank you to Charlotte for helping us all become Zoom-ers. Life can be very lonely for some people, but now we have regular contact with the family that is Musical Connections'*

*'MC have been a big help in what could have been a torrid 12 months. I could not have done so much without them explaining about Zoom and YouTube, and they have shown us how to record singing on a phone and to send videos in'*

While this was an incredibly positive development, we were conscious that several of our members remained excluded from our flourishing online community. We therefore acquired 6 new tablets (one was donated, four were borrowed, and we purchased one). It was apparent that, without broadband, initial usage of the tablet would have to be restricted to downloaded material, but we thought this could be a good way to get people started, and the purchasing of Wi-Fi could be explored further down the line.



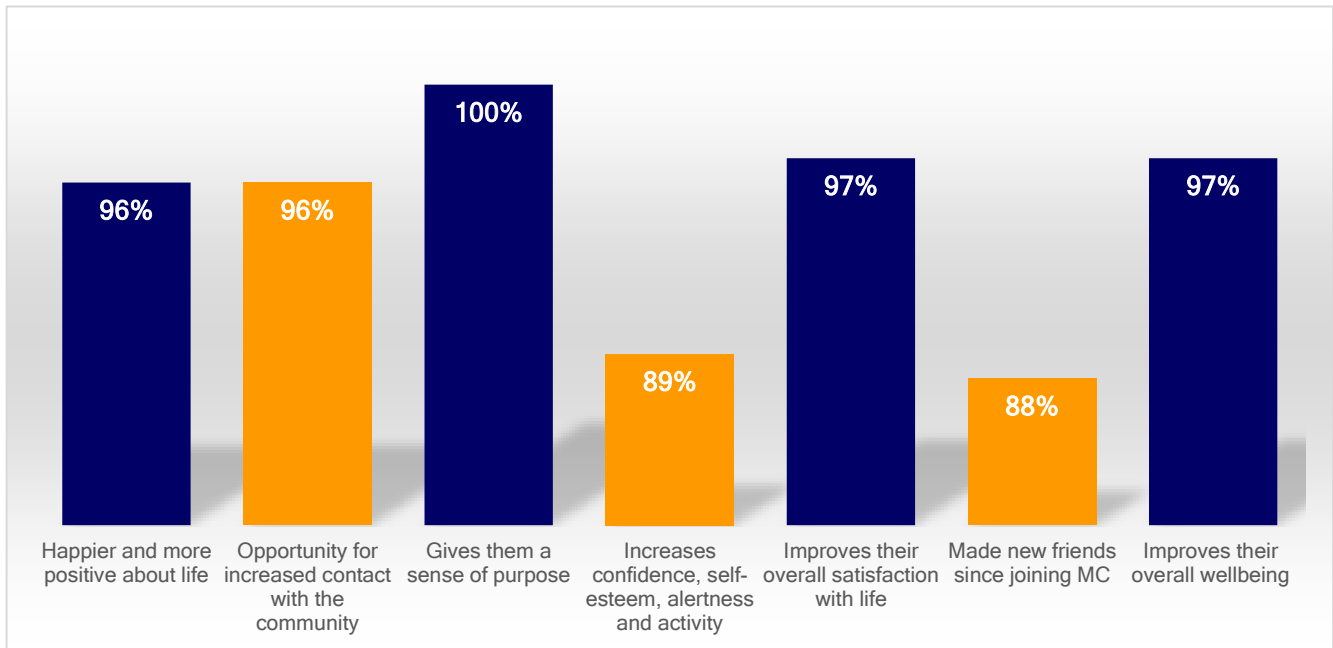
2 tablets were given to people living independently in the community, and 4 were given to people living in City of York Council's sheltered housing schemes. All were given instructions, and the people in the community received 1-1 support from our team. It was significantly harder to communicate with the sheltered housing tenants and, despite support from CYC's Active Communities Officer, it was clear that more would be needed to facilitate the integration of the



tablets into people's lives. We therefore plan to apply for funding to enable us to run face-to-face tablet training sessions, once restrictions are relaxed. We are also looking into the possibility of recruiting student volunteers to provide ongoing 1-1 support. It is clear that there are many advantages for vulnerable older people to be connected to the wider world via the internet, or even simply via downloaded material from an organisation such as ours (e.g., being able to view a concert or an event they are unable to attend because of ill health), and this will not change once the pandemic has passed.

# RESUMPTION OF CORE ACTIVITIES

As we move through 2021, we are now planning for a resumption of our core activities. While the social contact and musical engagement we are currently offering is making a significant positive difference to our members' lives while restrictions persist, we know that it is our face-to-face work that people are holding out for. In tracking questionnaires conducted with 104 participants at the start of the year (just after the first lockdown had started), we found that:



When we asked our members how they feel about returning to their group or choir, **99%** said they would **definitely be returning to face-to-face sessions**:

*'I'll be there like a shot!'*

*'I'll be on the front row!'*

*'I will definitely return to choir as soon as possible.'*

*'Nothing is more certain; I just love Musical Connections. I just wish I had found it earlier!'*

*'Am so looking forward to going back - I just want to be with you and have a laugh again'*

*'I'll be queuing to get in!'*

*'I'll be fighting everyone to get through that door - it's just wonderful, and I tell everyone that'*

However, having been through the experience of the last year, we are convinced that we will not be returning to a world or, indeed, a project that looks exactly the same as it did before the pandemic. Covid-19 has been a challenge like no other, but it has also triggered new ideas and ways of working which have given us a vision of a future for Musical Connections which involves significant evolution for the charity. This vision involves:

## **1. Incorporating digital/online activities alongside our 'in person' sessions**

- Thanks to our experience over the last 12 months, we have seen that vulnerable and isolated older people can be invigorated and/or more able to participate by engaging in different ways of making/accessing music, and so we wish to continue giving them a wider range of opportunities
- Creating recordings/videos for sharing on social/local media has given our members increased focus, as well as improving our local profile and triggering an increase in donations
- Like many others, we believe that integrating the use of tablets into the lives of vulnerable older people will significantly improve their connection with the wider world and their ability to engage with our work, and so we intend to build on learning from our tablet pilot, fundraise for more devices, and implement face-to-face training when restrictions allow

## **2. Continuing to recruit a diverse range of volunteers from different sources**

- The close contact we have had with our members over the last year has brought into sharp relief how much they benefit from an unhurried conversation with someone, and we are conscious that several of them would miss this if it stopped when groups resume, so we are going to use our existing volunteer team to continue to provide additional social connection to our most isolated members alongside weekly 'in person' sessions
- We will also be seeking to expand our volunteer team still further to provide companionship outside of our weekly sessions

### **3. Building on the strong sense of 'family' that we have created over the past year and increasing the voice of our members**

- We are keen to encourage members to take greater ownership of the project, where possible, and aim to implement plans made in early 2020 to create a participant-led steering group, enabling members to share ideas and work together to help steer the development of our work
- Asking members to be part of the recruitment process for new musicians
- Including more members in our conversations with funders and grant-makers (we have done this very successfully in a handful of cases)

### **4. Implementing organisational development**

- The pandemic has highlighted the skills and ambition of less experienced members of the team, and we are eager to give them the opportunity to develop project management skills to complement their undoubted technical/creative abilities - our team is increasing in robustness, and we are optimistic that this bodes well for the future of the charity

# FINANCES

## Income and Expenditure

Table 1 highlights the overall receipts and payments for the 1<sup>st</sup> April 2020 up to the 31<sup>st</sup> March 2021, the brought forward balance at the end of 19/20 and the subsequent bank balance.

The total receipts up to 31<sup>st</sup> March were £57,806 and the total payments were £68,741, which leaves a deficit balance of £10,935 for the financial year. When added to the carried forward balance from 2019/20 (£63,280), this left Musical Connections with a total balance of £52,345 for the end of the financial year.

The total amount of receipts allocated to unrestricted funding was £16,016 and there were payments to the value of £10,733, thus leaving an unrestricted surplus of £5,283 at the end of 2020/21. When added to the balance brought forward at the end of 19/20 (£22,317), and accounting for some minor transfers of funds (£61), this leaves the charity with £27,539 of unrestricted funds.

The total amount of receipts allocated to restricted funding was £41,790 and there were payments to the value of £58,008, thus leaving a deficit of £16,218 in restricted grants to carry forward into the next financial year. When added to the grants balance brought forward at the end of 19/20 (£40,963) and allowing for a small number of transfers between funds this leaves Musical Connections with £24,806 in restricted funds to carry forward into 21/22. It should be noted that the deficit in restricted funds at the end of the year is due to several multi-year grants being receipted in the previous financial year and a few 12-month grants being paid in part-way through last financial year. This has meant that some grant-funded activities in 20/21 were paid against a carried forward balance from 19/20.

The total receipts received in 20/21 (£57,806) were mainly made up of grants received £42,290 (73%) followed by community fundraising (£6,540) and individual giving (£6,093) which together represented 22% of the total. The remaining 5% of receipts were made up as follows: donations 3% (£1,812), session fees and contributions 2% (£1,071).

The payments (£68,741) were mainly made up of the overall people costs (92%) at £63,407.

The top five categories of payments and the % of the total they account for were as follows:

Community involvement activities - musicians' fees	- £37,578 (55%)
Project management fees	- £25,065 (36%)
Equipment	- £1,699 (2%)

Stationary and Covid-19 support postage costs	- £1,236 (2%)
Funding bids	- £823 (1%)

Table 2 provides a breakdown of receipts and payments for unrestricted funds and each individual restricted fund. It also provides the current surplus for each fund, the amount brought forward from 19/20 and the funds carried forward at the end of the financial year. This table also shows there were several grants where payments were made against a brought forward balance from 19/20 rather than a receipt in 20/21 e.g., Garfield Weston Charitable Foundation.

Table 3 shows the statement of Musial Connections assets and liabilities at 31<sup>st</sup> March 2021.

Table 1 - Receipts and Payments Accounts for the Year Ending 31<sup>st</sup> March 2021

			2020/21	2019/20
	Unrestricted funds	Restricted funds	Total funds	Total funds
	£	£	£	£
<b>Receipts</b>				
Session fees & contributions	1,071	-	1,071	15,309
Grants	1,000	41,290	42,290	38,141
Donations from individuals	1,312	500	1,812	1,180
Donations from individuals	6,093	-	6,093	166
Community fundraising	6,540	-	6,540	1,706
Events & training	-	-	-	1,834
<b>Total receipts</b>	<b>16,016</b>	<b>41,790</b>	<b>57,806</b>	<b>58,336</b>
<b>Payments</b>				
Session costs - musicians	-	-	-	28,202
Marketing & website	-	433	433	1,104
Meeting costs	352	-	352	755
Travel costs	52	263	315	5,579
Equipment	628	1,071	1,699	2,656
Insurance	-	372	372	372
Project management costs	3,628	21,437	25,065	22,030
Stationery & office costs	52	1,184	1,236	134
Funding bids & fundraising	823	-	823	1,850
Training costs	60	-	60	1,612
Community involvement activities / volunteer management - musicians	4,444	33,134	37,578	-
Venue costs	-	51	51	2,023
Volunteer costs	10	36	46	7,682
DBS checks	19	27	46	125
Independent examination	-	-	-	300
Self-evaluation	352	-	352	930
Miscellaneous expenses	313	-	313	-
<b>Total payments</b>	<b>10,733</b>	<b>58,008</b>	<b>68,741</b>	<b>75,354</b>
<b>Net of receipts/(payments)</b>	<b>5,283</b>	<b>-16,218</b>	<b>-10,935</b>	<b>-17,018</b>
<b>Transfers between funds</b>	<b>-61</b>	<b>61</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>22,317</b>	<b>40,963</b>	<b>63,280</b>	<b>80,298</b>
<b>Balance carried forward</b>	<b>27,539</b>	<b>24,806</b>	<b>52,345</b>	<b>63,280</b>

Table 2 - Unrestricted and Restricted Funds

	Balance b/fwd	Income received	Resources expended	Transfer of funds	Balance c/fwd
	£	£	£	£	£
<b>Unrestricted</b>	22,317	16,016	10,733	-61	27,539
<b>Restricted</b>					
Garfield Weston	9,999	-	10,000	1	-
Shears Foundation	5,000	-	5,000	-	-
Coop Local Community	28	-	28	-	-
Feoffees of St Michael	5,000	-	5,004	4	-
Step Change	5,000	-	5,000	-	-
D'Oyly Carte	3,000	-	3,039	39	-
Derwenthorpe Community Fund	293	-	-	-	293
York Common Good Trust	1,000	-	1,000	-	-
Charles Hayward Foundation	3,000	-	3,002	2	-
Inman Charity	2,000	-	2,001	1	-
Wharfedale Foundation	2,000	-	-	-	2,000
Micklegate Ward	-357	2,000	1,643	-	-
Joseph Rowntree Foundation	5,000	-	5,005	5	-
Yorkshire Building Society	-	1,800	1,800	-	-
Two Ridings C19 Community Fund	-	2,000	2,000	-	-
Masonic Charitable Foundation	-	3,594	799	-	2,795
Westfield Ward Grant	-	100	108	8	-
National Lottery Community Foundation	-	6,228	6,228	-	-
Jack Brunton Charitable Trust	-	2,000	-	-	2,000
HDH Wills 1965 Charitable Trust	-	500	-	-	500
Brelms Trust CIO	-	1,000	1,001	1	-
Ashley Family Foundation	-	5,000	-	-	5,000
Heworth Ward	-	1,000	1,000	-	-
Shears Foundation (2)	-	2,500	2,500	-	-
Liz and Terry Bramall	-	5,000	-	-	5,000
Cultural Wellbeing (CYC)	-	1,850	1,850	-	-
Ways to Wellbeing York CVS	-	2,218	-	-	2,218
Whitwam Family Charitable Trust	-	5,000	-	-	5,000
<b>Total Restricted</b>	<b>40,963</b>	<b>41,790</b>	<b>58,008</b>	<b>61</b>	<b>24,806</b>
<b>Total Funds</b>	<b>63,280</b>	<b>57,806</b>	<b>68,741</b>	<b>-</b>	<b>52,345</b>

Table 3 - Statement of Assets and Liabilities at 31<sup>st</sup> March 2021

			2020/21	2019/20
	Unrestricted funds	Restricted funds	Total funds	Total funds
	£	£	£	£
<b>Assets</b>				
Current bank account	27,534	24,806	52,340	63,195
Petty cash	5	-	5	85
	<b>27,539</b>	<b>24,806</b>	<b>52,345</b>	<b>63,280</b>
<b>Assets retained for charity's own use</b>	<b>Fund</b>	<b>Cost</b>	<b>Current Value</b>	
<b>Details</b>		<b>£</b>	<b>£</b>	
3 x keyboard	Unrestricted	300	150	
1 x keyboard	Life Less Lonely	155	50	
Large amp	Unrestricted	150	50	
Portable amp	Robert McAlpine	160	50	
Portable amp	Life Less Lonely	149	50	
3 x iPod touch	Freemasons	597	150	
Loop station	Unrestricted	135	20	
Chime bars	Freemasons	260	100	
Chime bars	Unrestricted	260	100	
Chime bars	Micklegate Ward	127	100	
Projector & case	Unrestricted	612	200	
Portable speaker	Unrestricted	160	50	
2 x banner stand	Unrestricted	400	-	
2 x camera	Unrestricted	379	100	
Notebook	Freemasons	299	150	
2 x tablet	Unrestricted	200	160	
			2021	2020
	Unrestricted funds	Restricted funds	Total funds	Total funds
	£	£	£	£
<b>Liabilities</b>				
Independent examination fee	300	-	300	300
	<b>300</b>	<b>-</b>	<b>300</b>	<b>300</b>

## Fundraising

We had to adjust our fundraising strategy this year, because of the loss of income from weekly session donations and care-home session fees. To compensate for this deficit, we applied for and received a significant amount of 'Covid-response' funding.

In addition:

- **Grants and donations** already in place were diverted towards our Covid support activities. We also managed to secure a couple of multi-year grants aimed at supporting us not only through the pandemic, but also through our return to core activities post-Covid
- We increased our **community fundraising** efforts, which were particularly successful with members who appreciated our efforts to support them, and who realised we needed to plug the gap left by the loss of session donations
- Unsurprisingly, given that much of the world was operating digitally, **online fundraising** was more effective than it had ever been

Moving forwards, we will be continuing all the above activities, although we anticipate that community and online fundraising will reduce for two reasons:

- Weekly session donations will resume as we re-start face-to-face sessions - the bulk of the income from community fundraising has come from members, who have been seeking to compensate for not contributing on a weekly basis - it is highly unlikely they will do both
- Our very small team does not have the resources to deliver a high volume of face-to-face activities **and** online fundraising activities

We would like to express our thanks to the following funders, who have supported us over the last year:

The Ashley Family Foundation

The Brelms Trust CIO

Charles Hayward Foundation

City of York Council

(Micklegate, Westfield and Heworth Wards, and Cultural Wellbeing Fund)

Derwenthorpe Community Fund

D'Oyly Carte

The Feoffees of St Michael's Spurriergate  
 Garfield Weston Foundation  
 HDH Wills 1965 Charitable Trust  
 The Hobson Charity  
 Inman Charity  
 Jack Brunton Charitable Trust  
 The Joseph Rowntree Foundation  
 Masonic Charitable Foundation  
 National Lottery's Coronavirus Community Support Fund  
 The Shears Foundation  
 Two Ridings Community Foundation  
 Wharfedale Foundation  
 Whitwam Family Charitable Foundation  
 York Common Good Trust  
 York CVS Ways to Wellbeing  
 Yorkshire Building Society

## Reserves Policy

Musical Connections' Reserves Policy, approved by the Trustees in July 2021, states that the charity should hold a maximum of £40k in reserves. This level of reserves was set after careful consideration of all the potential reasons reserves would be needed e.g. to aid cash flow, contingency planning to mitigate against unexpected expenditure, to commit designated funds to expenditure not covered by annual income and finally the closure of the charity. After due consideration of all these potential calls on reserves, it was determined that Musical Connections would need to hold a range of reserves between £9.5k and £40k. The trustees took the decision that they needed to protect the beneficiaries in the event of having to cease its operation and therefore the figure of £40k was agreed, as being 50% of the current operational costs of running the project with an additional 10% to go towards paying for any professional services that may need to be employed to aid closure. This level of reserves would protect the charity's beneficiaries, who are mainly socially isolated and vulnerable adults, and enable it to wind down its operation in a sustainable way, rather than abruptly withdraw its services, which would have a detrimental impact on their quality of life. At the end of 2020/21, the level of reserves held was £27,539.

# APPENDIX

Independent Examination and Trustees Annual Report

# **Musical Connections**

(Charity Number: 1165993)

## **Trustees Annual Report & Financial Statements for the year ended**

**31st March 2021**

# **outsourc**

Charity accounts preparation &  
independent examination service

# Musical Connections

(Charity Number: 1165993)

## Contents

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## Trustees' Annual Report

**From:** 1st April 2020

**To:** 31st March 2021

**Charity's full name** Musical Connections

**Registered Charity number** 1165993

### Objectives and activities

#### Summary of the purposes of the charity set out in its governing document

Musical Connections' objects, as set out in the constitution, are as follows:

- To advance the wellbeing of vulnerable and socially isolated people
- To relieve isolation and social exclusion amongst vulnerable people
- To provide opportunities for vulnerable and socially isolated people to learn, achieve and contribute to the work of the charity
- To share learning and skills

#### Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts

2020-21 has been dominated by the Covid-19 pandemic. In order to be able to continue to meet our charitable objects, we replaced our regular programme of weekly music groups/choirs and intergenerational activities with a package of uninterrupted social support and musical engagement (intergenerational, where possible), delivered both on- and off-line. We:

- Made welfare calls, at least once a week
- Sent emails several times a week to Musical Connections members who had internet access, and created an online community, involving the sharing of members' news, photos and links to other creative activities
- Sent letters, postcards and photos approximately once a month to people who weren't online,
- Undertook projects and interviews with local media to communicate with and involve members
- Carried out socially-distanced visits and doorstep singing - entitled 'MC on the Road' - when restrictions allowed.
- Delivered regular Facebook Live ('Singstream') and 'Zoom' singing sessions for participants who had internet access – we used our phone calls to help people get connected if they had technology at home that they previously didn't know how to use, and produced a step-by-step 'Zoom download' manual for members.
- Ran projects with students from both of York's universities, who created music and videos for and with our beneficiaries, including song-writing using lockdown-related lyrics suggested by members during phone calls and online sessions
- Created group video recordings and intergenerational concerts
- Downloaded videos and recordings onto DVD/CD, along with some of the internet-based sessions, and sent to group members who were not online but did have DVD players - we also purchased DVD players for a handful of members who did not have one, so that they didn't miss out.
- Set up a pen-pal project
- Held fortnightly Zoom coffee mornings
- Created a CD, entitled 'Our Musical Family', using recordings from members, students, Musical Connections musicians and local GPs
- Held regular 'song raffles'
- Ran a small pilot project introducing tablets to a handful of beneficiaries
- Delivered a hectic Christmas programme, which, in addition to the 'Carols on the Road' and a virtual intergenerational Christmas concert, involved:
  - An online advent calendar, which included musical or other creative contributions from members and local schoolchildren/students
  - A Musical Connections Christmas card, which was sent to everybody
  - Additional Christmas cards and a small music-themed Christmas decoration for our 20 most extremely isolated members
  - A video message from the MC musicians on Christmas Day

The trustees consider that they have complied with their duties to have due regard to the public benefit published by the Charity Commission.

## Achievements and performance

**Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.**

Prior to Covid-19, it was apparent that participating in a Musical Connections group or choir had significantly improved the lives of the vast majority of our members. In questionnaires conducted with 104 beneficiaries just after the first lockdown at the beginning of the year:

- 98% said that, pre-lockdown, going to their Musical Connections group improved their mood on the day (84% said it greatly improved it)
- 96% said that going to their Musical Connections group or choir helped them to feel generally happier and more positive about life. 75% said it greatly improved it
- 96% said that participating in Musical Connections sessions and events had given them an opportunity to make increased contact with other people/the wider community
- 100% said that participating in sessions and events had given them a sense of purpose and something to look forward to
- 89% said that participating in their Musical Connections group or choir had increased their confidence, self-esteem, alertness and activity levels
- 97% said that it improved their overall satisfaction with their lives
- 88% said they had made new friends since joining their group or choir
- 97% said it improved their overall wellbeing

It is not surprising, therefore, that many were anxious that we stayed connected to them during the pandemic. We were able to deliver the aforementioned activities to 200 previously regular group/choir participants on an ongoing basis throughout the year, and responses to questionnaires with 84 members in March 2021 showed the positive difference our efforts have made:

- 98% said that our support had helped to improve their wellbeing and reduce their feelings of isolation – despite lockdown restrictions, they said they now know the MC team and other members better than before (82% and 79% respectively)
  - 100% said that our work had improved their sense of belonging to a community
  - 86% said that we had helped to increase their social contact during lockdown restrictions
  - 81% said the activities we have offered have helped them to continue engaging in music
  - Where people had previously had contact with other organisations, 87% said that MC had made greater efforts than any other to keep people connected.
- 'They've kept me going this whole time, I don't lie. Nothing's been happening here (at the housing scheme), they're the only ones who've bothered – they haven't forgotten me and they've just helped me get through this horrible time'.

Despite losing an anticipated £15,000 in income from weekly session donations and care-home fees, we were able to secure a significant amount of Covid-response funding, and also increased our community and online fundraising. This enabled us to pay for the extra efforts required of the Musical Connections team in responding to the crisis and, in turn, facilitated a significant up-skilling amongst the musicians, who had to learn new skills to be able to work differently to support our beneficiaries effectively from a distance.

We were aided in our efforts by a team of volunteers, which expanded during the crisis, and our project partners, including both of York's universities, local schools, York Medical Group and NHS social prescribers. Sustaining these relationships while working remotely has been a considerable achievement, and one which now stands us in good stead as we start to resume our core activities.

In terms of wider benefits, our pilot project, which focussed on using tablets to introduce beneficiaries to the benefits of technology, has given us clear ideas about how to help older people get to grips with digital activities. We will be running a face-to-face training programme for several of our group/choir members in the coming year, and will be sharing the results of these activities with other agencies working towards digital inclusion.

## Financial review

### Review of the charity's financial position at the end of the period

At the end of the 2020/21 financial year, Musical Connections had been in receipt of £57,806 and made payments of £68,741 leaving a deficit balance of £10,935 for the year. This balance can be split into unrestricted and restricted as follows: a £5,283 surplus in unrestricted versus a £16,218 deficit in restricted grant income. The majority of the expenditure recorded as restricted was apportioned to carried forward balances rather than a receipt in 20/21, hence the deficit balance on the year. However, when this deficit is added to the carried forward balance from 2019/20 (£63,280), this leaves Musical Connections with a total balance of £52,345 at the end of the financial year, split into an unrestricted fund of £27,539 and £24,806 restricted funds.

**Statement explaining the policy for holding reserves stating why they are held**

Musical Connections' Reserves Policy, approved by Trustees in July 2021, states that the charity should hold a maximum of £40k in reserves. This level of reserves was set after careful consideration of all the potential reasons reserves would be needed e.g. to aid cash-flow, contingency planning to mitigate against unexpected expenditure, to commit designated funds to expenditure not covered by annual income and finally the closure of the charity. After due consideration of all these potential calls on reserves, it was determined that Musical Connections would need to hold a range of reserves between £9.5k and £40k. The trustees took the decision that they needed to protect the beneficiaries in the event of it having to cease its operation and therefore the figure of £40k was agreed. This level of reserves would protect the charity's beneficiaries, who are the most socially isolated and vulnerable adults and enable it to wind down its operation in a sustainable way, rather than abruptly withdraw its services which would have a detrimental impact on their quality of life.

**Amount of reserves held**

At the end of 2020/21 the amount of reserves held was £27,539. The Reserves Policy states that the maximum reserves held should be £40k, which at the present time reflects 50% of the core operational costs of running the sessions and an additional 10% to go towards paying for professional services that may need to be employed to aid closure. The ratio of reserves to net annual operating costs was 53:47 at the end of the financial year.

**Reasons for holding zero reserves**

N/A

**Funds materially in deficit**

N/A

**Explanation of any uncertainties about the charity continuing as a going concern**

N/A

**Additional information**

The last financial year was a difficult one for many charities, including Musical Connections, as the global pandemic COVID-19 impacted on the delivery of face-to-face services. This manifested itself in all face to face sessions stopping for the whole of the financial year and therefore all session donations dried up too. The resultant financial pressure Musical Connections found itself under, as it continued to support its beneficiaries, was recognised by a number of grant providers. The charity would like to thank the following for their support during 20/21: Yorkshire Building Society, Two Ridings Covid-19 Community Fund, Garfield Weston Foundation, Shears Foundation, Joseph Rowntree Foundation, Feoffees of St Michael's Spurriergate, Micklegate Ward, Wharfedale Foundation, Two Ridings Community Foundation, Masonic Charitable Foundation, Inman Charity, York Common Good Trust, Westfield Ward, D'Oyly Carte Charitable Foundation, Derwenthorpe Community Fund, Co-Op Local Community Fund, National Lottery Community Fund, Jack Brunton Charitable Trust, HDH Wills 1965 Charitable Trust, The Brelms Trust CIO, Ashley Family Foundation, Heworth Ward, Liz and Terry Bramall Foundation, Cultural Wellbeing Grant (City of York Council), Hobson Charity, Ways to Wellbeing (York CVS) and the Whitwam Family Charitable Foundation.

**Structure, governance and management**

**Description of the charity's trusts** N/A

**Type of governing document** Constitution

**How the charity is constituted** Charitable Incorporated Organisation

**Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees** Clause 10.1 of our constitution states that 'apart from the first charity trustees', every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. Clause 10.2 states 'in selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective management of the CIO.

**Additional governance issues (OPTIONAL)**

N/A

**Reference and administration details**

**Charity's full name** Musical Connections

**Other names the charity is known by** N/A

**Charity's principal address** PO Box 724  
York  
YO1 0HL

**Names of the trustees who manage the charity**

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to
Val Sutton	Chair		
Jo Farrington	Treasurer		
Chris Bartram			
Hazel Brown			
Richard Frost			

**Name of trustees holding title to property belonging to the charity**

Trustee name	Dates acted if not for whole year
N/A	N/A

**Funds held as custodian trustees on behalf of others**

Description of the assets held in this capacity	N/A
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N/A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

**Names and addresses of advisers (OPTIONAL)**

Type of adviser	Name	Address
N/A	N/A	N/A

**Independent Examiner** Karen Wood  
ACMA, CGMA  
Outsource Accountancy Services & Independent Examinations  
Hiscox Building, Peasholme Green  
YO1 7PR

**Bankers****Name of chief executive or names of senior staff members**

N/A

**Declaration**

The trustees declare that they have approved the Trustees Annual Report and Accounts

Signed on behalf of the charity's trustees

Signature



Full Name Joanne Maria Farrington

Position Treasurer

Date 16.11.21

**Independent examiner's report to the trustees of Musical Connections**

I report on the accounts of: **Musical Connections**  
for the year ended: **31st March 2021** which are set out on pages 6 to 9.

**Responsibilities and basis of report**

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Charity's accounts carried out under section 145 of the 2011 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 material 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 Trust 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.

*Karen Wood*

26/11/21

**Karen Wood (ACMA)**

**Date:**

Outsource independent examination  
service  
The Hiscox Building  
Peasholme Green  
York YO1 7PR

**Musical Connections**  
(Charity Number: 1165993)

<b>Receipts &amp; payments accounts for the year ending:</b>		<b>31st March 2021</b>		
	<b>Unrestricted</b>	<b>Restricted</b>	<b>2021</b>	<b>2020</b>
	<b>funds</b>	<b>funds</b>	<b>Total</b>	<b>Total</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Receipts</b>				
Session fees & contributions	1,071	-	1,071	15,309
Grants	1,000	41,290	42,290	38,141
Donations from organisations	1,312	500	1,812	1,180
Donations from individuals	6,093	-	6,093	166
Community fundraising	6,540	-	6,540	1,706
Events & training	-	-	-	1,834
<b>Total receipts</b>	<b>16,016</b>	<b>41,790</b>	<b>57,806</b>	<b>58,336</b>
<b>Payments</b>				
Session costs - musicians	-	-	-	28,202
Marketing & Website	-	433	433	1,104
Meeting costs	352	-	352	755
Travel costs	52	263	315	5,579
Equipment	628	1,071	1,699	2,656
Insurance	-	372	372	372
Project management costs	3,628	21,437	25,065	22,030
Stationery & office costs	52	1,184	1,236	134
Funding bids & fundraising	823	-	823	1,850
Training costs	60	-	60	1,612
Community involvement activities/volunteer management - musicians	4,444	33,134	37,578	-
Venue costs	-	51	51	2,023
Volunteer costs	10	36	46	7,682
DBS checks	19	27	46	125
Independent examination	-	-	-	300
Self evaluation	352	-	352	930
Miscellaneous expenses	313	-	313	-
<b>Total payments</b>	<b>10,733</b>	<b>58,008</b>	<b>68,741</b>	<b>75,354</b>
<b>Net of receipts/(payments)</b>	<b>5,283</b>	<b>(16,218)</b>	<b>(10,935)</b>	<b>(17,018)</b>
<b>Transfers between funds</b>	<b>(61)</b>	<b>61</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>22,317</b>	<b>40,963</b>	<b>63,280</b>	<b>80,298</b>
<b>Balance carried forward</b>	<b>27,539</b>	<b>24,806</b>	<b>52,345</b>	<b>63,280</b>

**Musical Connections**  
(Charity Number: 1165993)

<b>Statement of assets and liabilities at:</b>		<b>31st March 2021</b>			
		<b>Unrestricted</b>	<b>Restricted</b>	<b>2021</b>	<b>2020</b>
		<b>funds</b>	<b>funds</b>	<b>Total</b>	<b>Total</b>
<b>Assets</b>		<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Current bank account</b>		27,534	24,806	52,340	63,195
<b>Petty Cash</b>		5	-	5	85
		<u><b>27,539</b></u>	<u><b>24,806</b></u>	<u><b>52,345</b></u>	<u><b>63,280</b></u>
<b>Assets retained for charity's own use</b>	<b>Fund</b>			<b>Cost</b>	<b>Current</b>
				<b>£</b>	<b>value</b>
					<b>£</b>
<b>Details</b>					
3 x Keyboard	Unrestricted			300	150
1 x Keyboard	Life Less Lonely			155	50
Large amp	Unrestricted			150	50
Portable amp	Robert McAlpine			160	50
Portable amp	Life Less Lonely			149	50
3 x ipod touch	Freemasons			597	150
Loop station	Unrestricted			135	20
Chime bars	Freemasons			260	100
Chime bars	Unrestricted			260	100
Chime bars	Micklegate Ward			127	100
Projector & case	Unrestricted			612	200
Portable speaker	Unrestricted			160	50
2 x banner stand	Unrestricted			400	-
2 x camera	Unrestricted			379	100
Notebook	Freemasons			299	150
2 x tablet	Unrestricted			200	160
		<b>Unrestricted</b>	<b>Restricted</b>	<b>2021</b>	<b>2020</b>
		<b>funds</b>	<b>funds</b>	<b>Total</b>	<b>Total</b>
<b>Liabilities</b>		<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Independent examination fee		300	-	300	300
		<u><b>300</b></u>	<u><b>-</b></u>	<u><b>300</b></u>	<u><b>300</b></u>

**Musical Connections**  
(Charity Number: 1165993)

<b>Notes to the accounts for the year ended:</b>	<b>31st March 2021</b>
--	------------------------

**1. Basis of accounts**

The Trustees have taken advantage of section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

**2. Restricted income funds**

Where funds were originally granted for face to face work, funders kindly allowed their grants to be re-deployed to support Covid - response activities.

Fund name	Purpose
Garfield Weston	A 3-year grant towards core costs
Shears Foundation	A grant towards core costs for delivering musical activities which strengthen our community and provide educational opportunities for young people – 'Communities in Harmony'
Coop Local Community	Grant towards transport costs
Feoffees of St Michael	2 year grant towards core costs
Step Change	A grant from Two Ridings to deliver 'Step Change Vital York ' project
D'Oyly Carte	Towards provision of weekly music making sessions, choirs & related activities for people in York
Derwenthorpe Community Fund	For hire of a venue for The Rolling Tones
York Common Good Trust	A grant towards core costs
Charles Hayward Foundation	Weekly music group at Gale Farm Court
Inman Charity	A grant to help us continue our weekly sessions and to focus on the number of people participating
Wharfedale Foundation	To fund the Generations in Harmony, York project
Micklegate Ward	A grant to support the weekly music group at Barstow House.
Joseph Rowntree Foundation	A grant towards core costs, focussing specifically on delivering community activities to prevent or reduce isolation, where social or economic poverty is a contributing factor
Yorkshire Building Society	Covid response funding
Two Ridings C19 Community Fund	Covid response funding
Masonic Charitable Foundation	Second year of a 3-year grant to help us sustain and develop our work. The grant comes with a strong focus on active co-operation with a view to increasing and sharing learning
Westfield Ward Grant	A grant towards Covid-19 postage costs
National Lottery Community Foundation	Funding from their Coronavirus Community Support Fund to enable us to provide additional support to our beneficiaries over Summer 2020
Jack Brunton Charitable Trust	A grant towards costs
HDH Wills 1965 Charitable Trust	Funding towards venue hire for Honeysuckle Singers
Brelms Trust CIO	First instalment of a 3-year grant to deliver group music sessions and intergenerational activities for isolated older people in York
Ashley Family Foundation	First instalment of a 2-year grant towards core costs for 'Communities in Harmony'
Heworth Ward	: Covid response funding to support members of The Rolling Tones through the pandemic
Shears Foundation 2	Additional support for our Covid response activities
Liz & Terry Bramwell	A grant supporting a post-Covid resumption of our core activities
Cultural Wellbeing (CYC)	To provide social and cultural engagement for vulnerable and isolated people in York

	Balance b/fwd £	Income received £	Resources expended £	Transfer of funds £	Balance c/fwd £
Unrestricted	22,317	16,016	10,733	(61)	27,539
Garfield Weston	9,999	-	10,000	1	-
Shears Foundation	5,000	-	5,000	-	-
Coop Local Community	28	-	28	-	-
Feoffees of St Michael	5,000	-	5,004	4	-
Step Change	5,000	-	5,000	-	-
D'Oyly Carte	3,000	-	3,039	39	-
Derwenthorpe Community Fund	293	-	-	-	293
York Common Good Trust	1,000	-	1,000	-	-
Charles Hayward Foundation	3,000	-	3,002	2	-
Inman Charity	2,000	-	2,001	1	-
Wharfedale Foundation	2,000	-	-	-	2,000
Micklegate Ward	(357)	2,000	1,643	-	-
Joseph Rowntree Foundation	5,000	-	5,005	5	-
Yorkshire Building Society	-	1,800	1,800	-	-
Two Ridings C19 Community Fund	-	2,000	2,000	-	-
Masonic Charitable Foundation	-	3,594	799	-	2,795
Westfield Ward Grant	-	100	108	8	-
National Lottery Community Foundation	-	6,228	6,228	-	-
Jack Brunton Charitable Trust	-	2,000	-	-	2,000
HDH Wills 1965 Charitable Trust	-	500	-	-	500
Brelms Trust CIO	-	1,000	1,001	1	-
Ashley Family Foundation	-	5,000	-	-	5,000
Heworth Ward	-	1,000	1,000	-	-
Shears Foundation 2	-	2,500	2,500	-	-
Liz & Terry Bramwell	-	5,000	-	-	5,000
Cultural Wellbeing (CYC)	-	1,850	1,850	-	-
Ways to Wellbeing York CVS	-	2,218	-	-	2,218
Whitwam Family Charitable Trust	-	5,000	-	-	5,000
<b>Total Restricted</b>	<b>40,963</b>	<b>41,790</b>	<b>58,008</b>	<b>61</b>	<b>24,806</b>
<b>Total Funds</b>	<b>63,280</b>	<b>57,806</b>	<b>68,741</b>	<b>-</b>	<b>52,345</b>

**Transfer between funds**

Funds have been transferred from unrestricted funds to various overspent restricted funds,

<b>Approval of accounts for the year ended:</b>	<b>31st March 2021</b>
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The report and accounts were approved at a meeting of the Trustees held  
on:

16.11.21

Date

J Farrington

Signed for and on behalf of the trustees

17.11.21

Date

JOANNE FARRINGTON

Print name

TREASURER

Position (e.g. Chair etc)