

# **Oxford Bach Soloists**

## **Charitable Incorporated Organisation Trustees' Annual Report Year ended 31st August 2020**

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### **OBJECTIVES AND ACTIVITIES**

The CIO was established to promote, maintain, improve and advance the education of the public in the arts, culture, and heritage, and in particular (but without prejudice to the generality of the foregoing), the arts of orchestral, choral and other music.

Since the previous Annual Report (and since our founding) there has been no change to the CIO's principal charitable objectives and activities, which are:

1. the organisation and/or presentation of concerts of high educational and artistic merit, conferences, lectures and recordings;
2. the organisation and presentation of concerts and collaborations with schools and other places of education; and
3. by such other means as the Board of Directors shall from time to time determine.

This includes the organisation and promotion of concerts and the facilitation and organisation of other engagements such as workshops, lectures, and recordings in the United Kingdom and abroad. Alongside the core performances, the CIO is committed to providing additional opportunities for professional development and education through complementary projects and mentoring. In furtherance of these objectives the CIO engages international singers and instrumentalists, artists, performers and répétiteurs; additionally, the CIO engages skilled professional and technical advisers such as language and vocal coaches, musicologists, historians, and keyboard technicians.

The Trustees have reviewed the Charity's objectives and activities and acknowledged that they have paid due regard to the public benefit guidance published by the Charity Commission as noted in Section 4 of the Charities Act 2011. The CIO fulfilled its objectives by presenting 17 concerts and other performances, and continuing its educational scheme offering twelve Choral Scholarships each academic year. The Trustees express the objectives in a 'Mission Statement' and monitor its activities/initiatives against this.

### **ACHIEVEMENTS AND PERFORMANCE**

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From 1<sup>st</sup> September 2019 to 31<sup>st</sup> August 2020, the Oxford Bach Soloists gave 10 live performances to a total of 2,854 audience members, and 4 online performances reaching 53,565 views. The activities were as follows:

### Live Performances

- 7 live concerts followed the chronology of Johann Sebastian Bach's compositional output, combining existing and new historically informed performance practice techniques.
- 1 further live performance continued a collaboration with New College Choir: a new liturgical resource in the form of a truncated Lutheran Vespers with Bach Cantata, performed once each term.
- 1 further live performance saw Oxford Bach Soloists appear in the Bath Recitals series for the third year running, performing a Christmas Baroque programme.
- The remaining live performance was a Christmas fundraiser in Christ Church Cathedral Oxford, raising over £40,000 for Macmillan Cancer Support.

### Online performances

- In response to the UK coronavirus lockdown imposed on 23 March 2020, the Oxford Bach Soloists moved quickly to produce some unique lockdown content in the form of *St John Passion from Isolation*. A collaboration with production company Positive Note, this exceptional performance was released on YouTube in 9 episodes from 10 April to 31 May 2020, involving hundreds of musicians all over the world.
- 2 online performances began our "Back to Bach" monthly series, initiated during the lockdown to provide opportunities to offer paid work to musicians, whilst maintaining the Oxford Bach Soloists' online presence and profile, for continued engagement.
- 1 further online performance saw instrumentalists from the Oxford Bach Soloists collaborate with the choristers of New College Choir in their first episode of lockdown content, "apart/together".

In November 2019, the Oxford Bach Soloists appointed their first patron, Michael Chance CBE, one of the foremost exponents of the male alto voice in all areas of the classical repertoire, and a champion of Johann

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Sebastian Bach's music, recording over thirty discs dedicated to the composer.

In response to the UK coronavirus lockdown imposed on 23 March 2020, the Board of Trustees decided to cancel all planned live concerts through to March 2021, with the hope of restarting the organisation's regular concert series on Good Friday 2021 (2 April).

During this challenging period, the Oxford Bach Soloists' network of Friends and sponsors continued to support the organisation. Many renewed their memberships despite the lack of concert activity. A large number converted ticket purchases for cancelled concerts into donations, and some made additional donations on top of their usual membership.

Creating and releasing content online in this period has been an excellent way of engaging with this generous network, finding new and fruitful collaborations, and reaching out to new audiences worldwide.

The Choral Scholarship scheme, which was launched in 2018, welcomed its second cohort of twelve choral scholars. These scholarships have provided a unique opportunity for young aspiring singers to develop their solo singing within the musical programme of the Oxford Bach Soloists. Choral Scholars are appointed for a single academic year (September to August) and make up the core of the chorus, helping to maintain its musical integrity. Choral Scholars develop their skills by taking on the challenges of step-out solos during concerts and receive one-to-one expert German language coaching as part of their training, as well as extensive one-to-one mentoring from the Artistic Director of Oxford Bach Soloists.

Building on the successes of the inaugural cohort, the second cohort were on track to meet and exceed all of the objectives above, but came to a halt when the lockdown was imposed in response to the coronavirus pandemic. Despite the absence of any performance opportunities, the Oxford Bach Soloists continued to support its Choral Scholars throughout the year with one-to-one online coaching and a one-to-one online masterclass with the British baritone Roderick Williams. The recruitment cycle for a third cohort of choral scholars was suspended for a year.

The Oxford Bach Soloists' newsletter captures the experiences of the musicians as they journey through the complete vocal works of Johann Sebastian Bach, and is sent out to over 1000 followers every month

# **Oxford Bach Soloists**

## **Charitable Incorporated Organisation Trustees' Annual Report Year ended 31st August 2020**

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### **FINANCIAL REVIEW**

This was the third operating period of the charity. The proceeds from concerts were £50,883 in the 12-month period, compared with costs of £107,597. The shortfall has been covered by general fundraising from Friends (£33,369), and from general donations (£69,391). There is a surplus of £46,047 calculated on a cash basis, some of which will be spent on costs in the next financial period. The Charity has secured funding from an individual donor for 2020-21 which will allow significant growth and secured funds to pay musicians.

Proceeds from concerts and general fundraising are lower than the previous period, as fewer concerts were performed in a shorter period. However, choral scholarship donations, proceeds per concert, and general fundraising per month have all increased since the previous period, which reflects the growing audience and reach of the organisation.

General administration costs reduced slightly across the period while the fees paid to musicians increased significantly.

At the end of the financial period, the Charity held assets of £83,000. These assets are adequate to provide the charity with working capital and the Trustees do not believe them to be excessive. Work continues to build a strong base of regular donors through the Friends programme and to sponsor the appointment of choral scholars. The charity does not break even on all the concerts which it performs, though it aims to be sustainable over a full 12-month period.

### **STRUCTURE, GOVERNANCE AND MANAGEMENT**

The Charity is constituted as a Charitable Incorporated Organisation and has memorandum and articles associated with this.

New Trustees are appointed according to the following procedure:

- a) Identifying an area of expertise either useful to the Charity or not present in the existing makeup of the Board.
- b) A process of gathering names.
- c) Names to be discussed at Trustees' meeting

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## **Charitable Incorporated Organisation Trustees' Annual Report Year ended 31st August 2020**

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- d) Selected individual(s) to be interviewed in person by two or more Trustees.
- e) Election of a nominated person in a formal meeting of Trustees.

The support the administration of the Charity as it grows, the Charity has:

- a) Engaged the services of a professional bookkeeper.
- b) Engaged a General Manager working 3 days per week to drive the operational side of the Charity

### **REFERENCE AND ADMINISTRATIVE DETAILS**

The Charity is registered as Oxford Bach Soloists with Charity registration number 1172192. Its registered office is 29 Stanley Close, Oxford, OX2 0LB

Trustees during the period were:

Mr Miles Young, Chair

Ms Helen Morton, Treasurer (appointed 26 November 2020)

Professor Robert Quinney

Ms Judith Finch (retired as Treasurer on 26 November 2020 but remained a Trustee)

Dr Pegram Harrison

Mr Paull Hammond-Davies (retired 18 May 2020)

Ms Miranda Whiteley

The Trustees named on the Charity's bank account during the period were the Chair and the Treasurer.





CHARITY COMMISSION  
FOR ENGLAND AND WALES

Oxford Bach Soloists

1172192

## Receipts and payments accounts

CC16a

For the period  
from

01/09/2019

To

31/08/2020

### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Own Production Engagements	22,926	-	-	22,926	-
External Production Engagements	27,957	-	-	27,957	61,266
Donation Income (Gifts/Trusts & Foundations)	33,369	-	-	33,369	11,138
	-	-	-	-	-
Donation Income (Choral Scholarship Donations)	-	-	-	-	13,469
Donation Income (Individual Giving)	69,391	-	-	69,391	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>153,644</b>	<b>-</b>	<b>-</b>	<b>153,644</b>	<b>85,874</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>153,644</b>	<b>-</b>	<b>-</b>	<b>153,644</b>	<b>85,874</b>
<b>A3 Payments</b>					
Own Production Engagements - Musicians Fees	76,092	-	-	76,092	41,555
	-	-	-	-	-
Own Production Engagements - All other costs	3,532	-	-	3,532	3,937
Marketing/Comms	5,668	-	-	5,668	6,708
Staff	1,868	-	-	1,868	10,304
Paypal + Stripe fees	947	-	-	947	880
Own Production Engagements - Choral Scholars	19,473	-	-	19,473	8,673
Miscellaneous costs	17	-	-	17	-
	-	-	-	-	-
<b>Sub total</b>	<b>107,597</b>	<b>-</b>	<b>-</b>	<b>107,597</b>	<b>72,057</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>107,597</b>	<b>-</b>	<b>-</b>	<b>107,597</b>	<b>72,057</b>
<b>Net of receipts/(payments)</b>	<b>46,047</b>	<b>-</b>	<b>-</b>	<b>46,047</b>	<b>13,817</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>36,954</b>	<b>-</b>	<b>-</b>	<b>36,954</b>	<b>-</b>
<b>Cash funds this year end</b>	<b>83,001</b>	<b>-</b>	<b>-</b>	<b>83,001</b>	<b>13,817</b>

## Section B Statement of assets and liabilities at the end of the period



Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	<div>HSBC</div> <div>Papal</div> <div>Stripe</div> <div><b>Total cash funds</b></div> <div>(agree balances with receipts and payments account(s))</div>	<div>63,625</div> <div>19,376</div> <div>-</div> <div>83,001</div> <div>OK</div>	<div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>OK</div>	<div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>OK</div>
<b>B2 Other monetary assets</b>	<div>Details</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div>	<div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div>	<div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div>
<b>B3 Investment assets</b>	<div>Details</div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div>Fund to which asset belongs</div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div>Cost (optional)</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div>	<div>Current value (optional)</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div>
<b>B4 Assets retained for the charity's own use</b>	<div>Details</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div>Fund to which asset belongs</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div>Cost (optional)</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div>	<div>Current value (optional)</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div>
<b>B5 Liabilities</b>	<div>Details</div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div>Fund to which liability relates</div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div>Amount due (optional)</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div> <div>-</div>	<div>When due (optional)</div> <div></div> <div></div> <div></div> <div></div> <div></div>

Signed by one or two trustees on behalf of all the trustees

Signature

Print Name

Date of approval

P.M. Morton  
HELEN MORTON

3/09/21  
3/9/21





Section A

Independent Examiner's Report

Report to the trustees/  
members of

Oxford Bach Soloists

On accounts for the year  
ended

31 August 2020

Charity no  
(if any)

1172192

Set out on pages

1

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31 / 08 / 2020**.

Responsibilities and  
basis of report

As the charity's trustees, 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 Trust'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 (other than that disclosed below \*) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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.

Signed:

Date: 22 / 09 / 2021

Name:

Kirsten Gillingham

Relevant professional  
qualification(s) or body  
(if any):

CIPFA  
Membership number: 66893

Address:

69 Wantage Road

Wallingford

OX10 0LS



Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

**Give here brief details of any items that the examiner wishes to disclose.**