SMART

(Suffolk Music & Arts Alumni Trust)

Charity number: 1177728

Trustees' Annual Report & Financial Statement

1st April 2022 to 31st August 2023

Reference and Administrative Information

Trustees

Ms Rebecca Reidy	Co-Chair
Miss Victoria James	Co-Chair and Grants Officer
Mr William Peall	Vice Chair & Designated Safeguarding Officer
Mr Howard Brialey	Treasurer (appointed 23 July 2022)
Mrs Wendy James	Treasurer (until 23 July 2022) & Fundraising Officer
Mrs Carly Markkanen	Membership Secretary & Lead Board Member for Safeguarding
Mr Jake Batley	Community Music Officer (office vacated 13 June 2022)
Miss Grace Harman	Media and Publicity Officer
Mr Nathan Austin	Committee Member

Nominated Trustees

Mr Ben Chadwick	Head of County Music Service
Mr Callum Given	Head of Community, Britten Pears Arts (office vacated 29 March 2023)
Miss Morgan Barber	Youth Trustee (from 8 June 2022)
Miss Jess McInnes	Youth Trustee (from 8 June 2022)

Office Address: SMART, % Mr W Peall, Office 305, Franciscan House, 51 Princes Street, Ipswich, IP1 1UR

Charity number: 1177728

Auditors: Kevin Boom

Bankers: Lloyds Bank Plc, Chelmsford Legg St Osc, 1 Legg St, Chelmsford, Essex, CM1 1JS

Charity's Object: To relieve the needs of young people from Suffolk who have needs by reason of youth; in particular, but not exclusively, by the provision of grants to access or participate in art in its widest form, including music.

Trustees' report

Overview

Our vision: all young people in Suffolk have access to arts opportunities.

Our mission: we fund access to arts opportunities for the young people of Suffolk, by using the skills, passion and experience of Suffolk arts alumni and supporters.

Since inception in 2018, we have focussed on building our board of trustees, growing our membership and our funds, putting on several member events (Latitude 2019 being a highlight), and putting in place much of the infrastructure needed to run a charity. We started awarding grants and scholarships in the 2021/22 academic year, and have continued to develop our abilities to award grants and scholarships to young people in Suffolk needing our support. Since inception we have now:

- supported **29 people** (26 grant recipients, 3 scholars), with
- grants and scholarships totalling over **£10,800 (grants)** and nearly **£3,700 (scholarships)**, delivering
- an **average grant award of over £400** and an **average annual scholarship value of nearly £800**.
- Thanks to a grant we received from the Ardonagh Trust, we have also contributed £5,000 to support 86 people in the Suffolk Youth Ensembles to benefit from an opportunity to tour abroad with their ensembles.

This report covers the 2022/23 financial year, from 1 April 2022 to 31 August 2023. The trustees agreed in September 2022 to extend this financial year, on a one-off basis, by 5 months from the original year-end date of 31 March 2023. This aligns with the academic year, and enables better alignment with the grant application cycle.

During this financial year, the trustees have continued to work towards the strategy set during 2021/22, to ensure SMART grows and develops and can support more of the young people of Suffolk. Four strategic pillars guide all our work towards our vision and mission (see above). Each pillar has a set of actions to help us understand who we can work with and what they need, build our profile, leverage connections with partners, and deliver on each of the strategic pillars.

1. **Deliver funding** to young artists in Suffolk who need it
    - Understand who needs our support & why
    - Build profile with young artists
    - Leverage connections with Suffolk arts organisations to engage young artists seeking support
    - Deliver grants & scholarships

2. Grow an engaged **membership** to drive fundraising activity
    - Understand what our members want and can offer
    - Build profile with existing and potential members
    - Leverage connections with Suffolk arts organisations to drive new members
    - Deliver member events to raise funds

3. Build and maintain **funds** to support our mission
    - Understand opportunities for revenue streams & potential donors
    - Build profile with potential donors
    - Leverage connections with Suffolk arts organisations to raise funds
    - Deliver an increase in available funds

4. Build a strong **identity**
    - Tell a clear story about our work
    - A strong & diverse board with balanced skills
    - Appropriate governance for our size
    - Establish reputation as a well-run, impactful charity

As we grow, we are now expanding beyond our roots in the Suffolk County Music Service, supporting young people and drawing members from across all arts forms.

Three values guide how we carry out our work. We are:

- **nurturing**: we nurture individuals
- **equitable**: we aim to create equity within the arts
- **collaborative**: we work with others to achieve our vision

It has been exciting to see progress against each of these strategic pillars, especially around delivering funding to young artists in Suffolk. We are grateful for all of the time that our trustees and supporters are able to contribute to SMART that has enabled this progress. We set out below more about the actions taken during the 2022/23 financial year towards each of our strategic aims.

Deliver funding to young artists in Suffolk who need it

Grants awarded (£)	SMART: £2,846 | FoSYM: £450 | Scholarships: £2,632.50
Grants awarded (#)	10 (SMART: 9 | FoSYM: 1)
Scholarships awarded (#)	3
Average award amount (£)	£456
Arts disciplines supported	Music, Musical Theatre

The above figures include grants and scholarships that were agreed by Trustees for activity taking place in the 22/23 extended financial year, although payments may not have been made during this time period. In addition, the £5,000 award from the Ardonagh Trust that was awarded to the Suffolk County Music Service is not included in the above figures. One grant was awarded for 23/24 Academic Year but was paid in the 22/23 Financial Year, so the above will not match the statement of accounts.

We received 19 grant applications during this financial year, a marked increase on the previous year, even when taking into account the extended time period. It is our belief that this is due to two factors: the opening up of arts activities post-pandemic, and an increased awareness of SMART's existence and the availability of grants.

At the start of the year, the trustees compiled a list of potential partners: arts organisations, ensembles, festivals, community groups, stakeholders and individuals and wrote to them detailing who we are and what we do. We asked these potential partners to spread the word by sharing marketing materials and by signposting any potential grant recipients to our website for further information. One potential partner who came back with enthusiasm was Stagecoach Ipswich, where their Principal referred several of their students and we have awarded several grants to young people of all ages who benefit from the fantastic work Stagecoach does.

*"I just wanted to thank you so much for the grant I've received making me able to continue with Stagecoach. Ever since I joined Stagecoach it's **really helped my confidence grow** and helped with my singing, dancing and acting skills. Before joining Stagecoach, I struggled with my confidence but Stagecoach has helped me **do things I never thought I'd be able to do**, one of those being performing in front of an audience."*
Grant recipient

We are continuing to explore with Stagecoach how we can develop our partnership with mutual benefit including cross-promotion and fundraising initiatives.

In addition to the 10 grants and 3 scholarships awarded to individuals, we were also in the position to make a large grant to the Suffolk County Music Service to subsidise the costs for participants of the Suffolk Youth Ensembles international summer tours in 2022. This was made possible due to SMART receiving £5,000 from the Bright Future Prize via the Ardonagh Community Trust. This grant was won by trustee Grace Harman on behalf of SMART. Costs of the SCMS tours have increased significantly in recent years (for example the international tours for Suffolk Youth Orchestra and Suffolk Youth Wind Orchestra increased by £140 per pupil from the awarding of the contract to delivery of the tours). This can be prohibitive for the young people who want to perform at the highest level and gain unforgettable life experiences through participating in these tours.

The Ardonagh Community Trust's donation meant that parents were only asked for a further payment of £65 which helped considerably in ensuring no one was excluded from touring on the basis of finance. 86 members, from 80 families, felt the benefit of this, and it enabled 7 international concerts *(combined from both ensembles)*, including over 8.5 hours of performing. Suffolk County Music Service have produced a video to thank the Ardonagh Trust and celebrate the tours, and this is available to watch on the Music Hub Youtube channel.

Geographic Distribution of Awards

We have seen a large increase in the geographic distribution of our grants and scholarships. In the 21/22 financial year we had only Ipswich and Bury St Edmunds-based grant recipients and scholars. This year we have had a much wider reach, including Haverhill (west), Bungay (north), Felixstowe (south east) and Woodbridge (east). This demonstrates promising progress that the funds distributed by SMART are benefitting young people across the whole county and we will look to continue to expand and increase this reach over the coming years.

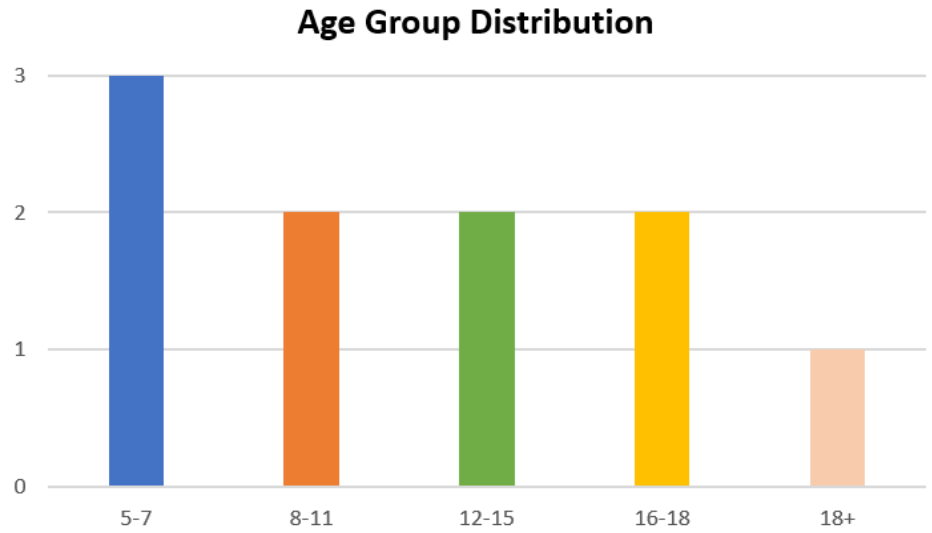
Grants

As above, we awarded 10 grants this year and have been delighted to hear about the excellent progress our recipients are making, supported by SMART's funding. Not only have we increased the number of grants awarded, but we have supported multiple disciplines across a huge age range.

*"It was amazing news to find out that SMART is helping towards my orchestra fees this year. Without this help I wouldn't have been able to afford to continue with Suffolk Youth Orchestra this year. SYO has been **such a good experience**, it's helped me **gain confidence** in my playing and given me many opportunities to perform. The highlight of our SYO year is the **European Tour** where we spend 6 days in a European city and perform in concert venues every day. I'm really looking forward to this, it's an **amazing opportunity to play** in another country and great fun!"*

*"He has already **received offers** from the Royal Welsh College of Music and Drama and the Royal Birmingham Conservatoire with **talks of scholarships** in the works. He is also awaiting news from the Royal Northern College of Music, Royal Academy of Music and Royal College of Music."*

*"He has **thoroughly enjoyed** being back to Stagecoach…He has very much **got stuck in** with learning the songs. I often hear him **singing/humming** them to himself while he is enjoying some downtime after school."*



SMART Scholarships

SMART Scholarships, funded by the ringfenced Friends of Suffolk Youth Music fund, provide up to 50% of one year's funding for young people in Years 7-13 to continue their musical learning through Suffolk County Music Service tuition, to attend a Suffolk County Music Service area ensemble, and towards any instrument hire costs.

We are delighted that our two original scholars continue to grow and develop musically and still play an active part in Suffolk Youth Orchestra and Suffolk Youth Wind Band, as well as area ensembles in West Suffolk. As a result, we continued their scholarships for the 22/23 academic year. In addition, we welcomed a new scholar for this year, a trombone player who also plays in the West Suffolk Youth Jazz and Wind Bands.

Two of these scholars will complete their time in education at the end of the 23/24 academic year, and so their scholarships will also come to an end. We hope to engage our current scholars in showcasing their talents (for example, performing at SMART events), to encourage more scholarship and grant applications, to tell the story of what SMART offers, elicit donations, and

encourage young people to take part in SCMS activity.

Build and maintain funds to support our mission

Income	£6,430.84
Income Streams	Amazon Smile £60.43 Collections at Concerts £456.87 Funeral Donations £628.22 Gift Aid £649.32 Interest on savings £46.50 Anonymous Donation £2,500.00 Concert Receipts £1,464.50
Core Running Costs (% of income)	£297.20 (4.62%)
Fundraising Costs	£14.31
Total Funds	£38,572.05 (SMART £9,361.65 / FoSYM £29,210.40)

We received a generous donation of £628 following collections made at the funeral of Peter Lister, a Suffolk artist, musician and teacher who sadly passed away in February 2022. Our thanks go to Peter's daughter Emma, for arranging the collection and helping to spread the word about SMART among Peter's family and friends. The donation made on behalf of Peter was able to support three grant applicants, including cello lessons for a Year 5 student, music college audition fees for a Year 13 student, and music theatre lessons for a Year 10 student. We are grateful to Emma for enabling this to happen and for helping to remember Peter in this way.

Further financial narrative can be found in the Treasurer's Statement below.

Grow an engaged membership to drive fundraising activity

As at the end of August 2023, we had 147 active members (an increase of 16 from last year). Although currently our members still join mainly via our roots in the Suffolk County Music Service, we are aiming to grow the membership more widely across other youth arts in Suffolk to reflect the diversity of arts we support through our grants.

After discussions with Latitude Festival looked positive for a return performance this year, we were unfortunately unable to reach a deal with the festival in time. Latitude has previously been a huge boost to our membership numbers and fundraising activity, and is above all a great opportunity for members to connect across Suffolk Youth Music generations and play together. Whilst this was a huge disappointment to all, we have since been discussing alternative platforms to promote member activities and deliver some of the ideas suggested in last year's member survey during 2023-2024. We look forward to being able to meet in-person again with our members: we value our members' support in our mission to deliver funding for young people in Suffolk.

We have kept in touch with members through five newsletters throughout the year. Newsletters remain an important point of contact with our members, where we share updates from grant recipients, other news and opportunities to get involved with the charity's fundraising efforts.

Building a strong identity

- **Building our profile and telling a clear story about our work**

In March 2022, we began a large piece of work to update our website, simplifying the structure and content to reflect our strategy. This work has now been completed, and the website continues to be updated regularly with stories of our grant recipients' and scholars' success. In addition, we created new online versions of both our grant and scholarship application forms to increase the ease of the user experience and the administration of processing applications.

At the start of the year, the trustees compiled a list of potential partners: arts organisations, ensembles, festivals, community groups, stakeholders and individuals and wrote to them detailing who we are and what we do. We asked these potential partners to spread the word by sharing marketing materials and by signposting any potential grant recipients to our website for further information.

We have already seen an increase in the variety of activity, art forms and genres for which grants have been applied and we know this can only increase as we continue to work with other partners, award more grants and increase our presence physically and digitally.

We continue to work closely with the Suffolk County Music Service, who actively promote the charity and permit opportunities for SMART to have a presence with the young people and their parents/guardians who take part in their ensembles. This has included our Youth Trustees speaking at rehearsal days and a SMART stall at performances. We will be holding our next Annual General Meeting at the end of the Christmas rehearsal period, combining with SCMS' planned "sharing afternoon" as an opportunity for members, donors, stakeholders and friends to meet, network and hear about what SMART has been doing.

We continue to be active on social media using a variety of platforms:

Website: www.SuffolkSMART.org
Facebook page: https://www.facebook.com/SuffolkSMART/
Twitter: @SuffolkSMART https://twitter.com/SuffolkSMART
Instagram: @SuffolkSMART

Although the number of posts on social media has been smaller than in previous years, mainly due to fewer charity events and activity, we have seen consistent engagement on our social media platforms, and continue to grow our following.

3,986 page reach 309 visits 45 new page likes 296 page follows*	101 followers* 504 impressions	115 followers*	4218 total views*

*to date

- **Trustees and governance**

As at the end of August 2023, we had 8 elected trustees and 3 nominated trustees. We currently have two vacancies for elected trustees, and one vacancy for a nominated trustee. Nominated trustees are appointed by the Suffolk Music Education Hub, and the intention is to recruit nominated trustees who have links to an organisation involved in music or the arts in Suffolk, or skills in a related field.

In June 2022, Jake Batley (elected trustee) resigned as a trustee, staying on as a supporter and member. Thanks to Jake for all his contributions during his time as trustee.

We also welcomed Morgan Barber and Jess McInnes as nominated youth trustees, bringing their perspective as current members of Suffolk Youth Music ensembles. (Nominated youth trustees are appointed by the Suffolk Music Education Hub, and must be aged over 16 and participants in a Suffolk-based, youth music or other arts organisation.)

At our AGM in July 2022, Will Peall, Wendy James and Vicky James (elected trustees) stood down and were re-elected.

We also welcomed Howard Brialey as our Treasurer at the AGM, taking over from Wendy James who had been standing in as Interim Treasurer. Howard was the successful applicant after a recruitment campaign placed with various volunteering networks. His passion for music, and his financial experience (running his own companies, consulting) and trustee experience (acting as treasurer for other charities) stands him in good stead for this role.

We were delighted that Ben Chadwick was confirmed as Head of Suffolk County Music Service in July 2022, after carrying out the role on an interim basis for the 2021/22 academic year. As a nominated trustee Ben has been a great advocate for SMART, strengthening our relationship with the Suffolk County Music Service, raising our profile with current Suffolk Youth Music members, with potential grant and scholarship recipients (through staff at the Suffolk County Music Service), and with potential donors.

In March 2023 Callum Given resigned as a nominated trustee as he moved on from his role as Head of Community at Britten Pears Arts. Callum's energy, skills and perspective played a key part in helping to refine our vision, our strategy, and our communications around our purpose and our impact. He brought to the board his insights and experience of youth arts in Suffolk, and helped us make connections. Thanks to Callum for all his contributions during his time as a trustee.

As set out in last year's trustee report, we continue with our strategy to use every trustee vacancy as an opportunity to work towards a strong and diverse board with balanced skills. We identified a need to strengthen our board with specific skills in fundraising, marketing and communications, and to build links with a wider range of arts organisations in Suffolk through recruitment for our nominated trustee vacancy. While we had some interest in these roles, we have so far been unsuccessful in recruiting, so will continue our search with renewed focus in the 2023/24 financial year. In the meantime, Wendy James continues in the role of Fundraising Officer on an interim basis.

The grants sub-committee met four times during the financial year (once a term) to consider grant applications, and the finance sub-committee met once.

Statement of financial activities for the year ending 31st August 2023

	31st August 2023	
Income		
Membership Fees	£ -	
Member Donations	£ -	
Private Donations	£3,142.53	
Ardonagh Trust	£ -	
Sidegate Primary School Concert Receipts	£1,464.50	
Paypal Giving Fund	£ -	
Latitude Fee	£ -	
Collections - Latitude	£ -	
Fundraising - sponsored events, collections, etc	£456.87	
Amazon Smile	£60.43	
EveryClick (Give as you Live)	£ -	
Interest received on FoSYM funds	£46.50	
Interest received on other funds	£ -	
Membermojo Test	£ -	
Gift Aid Claimed	£599.34	
		£5,770.17
Expenditure		
Grants - SMART fund	£2,846.00	
Grants - FoSYM fund	£450.00	
Scholarships - FoSYM Fund	£2,632.50	
Grants - other	£300.00	
Paypal Mojo	£ -	
Goodbox costs/fees	£ -	
Duplicate Payment part refunded	£625.00	
Donation to SCM (Ardonagh Trust)	£5,000.00	
Counter top units (collecting boxes)	£ -	
Insurance	£ -	
Stationery/Admin	£ -	
T-shirts (for collections)	£ -	
Paypal fees	£14.31	
Miscellaneous Resources	£ -	
MemberMojo subscription renewal	£75.00	
Information Commissioner's Office Fees	£35.00	
Website renewal	£187.20	
		£12,165.01
Surplus/(Deficit) for year		**-£6,394.84**
Surplus/(Deficit) brought forward		**£44,966.89**
Total		**£38,572.05**

Represented by:		
Current Account	£29,521.96	
Instant Access Savings Account	£9,050.09	
6 Months Savings Account	£ -	
18 Months Savings Account	£ -	
Paypal Account	£ -	
	£38,572.05	
Made up of:		
Restricted Funds (FSYM balance)	£29,210.40	
General Funds	£9,361.65	
Total	**£38,572.05**	

N.B. The above 2022/23 accounts are the audited version of the unaudited accounts shared at the AGM.

Treasurer's statement

First, it is important to note that the accounts are covering a period of 18 months, following the trustees' vote to bring the SMART Financial Year in line with the Academic Year, so the period covered in my report is 1 April 2022 to 31 August 2023.

We brought forward bank balances totalling £44,966.89 and our income during the accounting period was £5,770.17, with outgoings of £12,165.01.

Income

The largest contribution to our income was £2,500 from an anonymous donor, followed by income (£1,464.50) received from donations from a concert held at Sidegate Primary School. We also received donations of £628.22 from Much Loved, thanks to the generosity of the Lister family who took donations at the funeral of Peter Lister on behalf of SMART. The rest of the SMART income is made up of receipts from Amazon Smile donations, collections at concerts, gift aid and bank interest.

Outgoings

We issued grants from SMART of £2,846.00 and grants from FoSYM of £450.00 and scholarships to the value of £2,632.50. During the year 2021/22 we were in receipt of funds of £5,000.00 from the Ardonagh Trust awarded as part of the Bright Futures Prize, which was won by SMART Trustee Grace Harman, and this money was awarded to Suffolk County Music Service to help with the costs of running ensemble tours.

Reserves	2022/23	2021/22	2020/21	2019/20	2018/19
FoSYM Restricted Funds	£29,210.40	£32,292.90	£35,276.07	£35,276.07	£0.00
SMART General Funds	£9,361.65	£12,673.99	£6,980.06	£4,544.11	£1,967.71
Total	**£38,572.05**	**£44,966.89**	**£42,256.13**	**£39,820.18**	**£1,967.71**
Increase/Decrease on previous year	-£6,394.84	£2,710.76	£2,435.95	£37,852.47	-