BLUES AND ROOTS
Ensemble
The Music of
Charles Mingus



Annual Report and Unaudited Financial Statements For The Year Ending July 31st 2023



Registered Charity in England and Wales
Number - 1192545

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Introduction

The trustees present their report with financial statements for the charity for the year ended 31st July 2023.

Incorporation
The CIO was registered and commenced trading on 26th November 2020.

Registered Charity Number
1192545

Registered Address
15 Arterberry Road, Wimbledon, London. SW208AF

Trustees
Soo Bishop (Chair), appointed 26/11/20
David Greening, appointed 26/11/20
Nancy Buchanan, appointed 26/11/20
Richard Mallett, appointed 7/9/23

Artistic Director
Ed Babar

Projects Manager
David Lalljee

Objectives

The objective of the CIO is to promote the public knowledge and appreciation of the works of Charles Mingus and the genre of jazz more widely, in particular, but not exclusively, through educational workshops and public performances.

Summary of Activities

Across the 2022/2023 year Blues and Roots Ensemble (BARE) devised and delivered two significant new projects, establishing new partners and reaffirming links with organisations that the ensemble had worked with previously.

BARE received a grant from Arts Council England and a contribution from the Ronnie Scott's Charitable Foundation to run the "North & South" Project - a set of workshops in 4 state schools based in the London boroughs of Merton and Camden that culminated in two live-streamed performance days at Goods Way venue in Kings Cross, London. "North & South" gave the opportunity for BARE to work with Camden Music Service for the first time, as well as establishing links with The Venues Group who run Goods Way and Lafayette venues in Kings Cross.

In partnership with Merton Music Foundation, Blues and Roots Ensemble created a theatre show covering the history of jazz through the music of Charles Mingus, that was performed to over 1700 students across morning and afternoon concerts at New Wimbledon Theatre. The show was prepared for with a series of videos uploaded to YouTube that teachers could access for free in advance of the show, in order to learn a set of songs to perform with the band. Merton Music Foundation also hosted an afternoon CPD session for primary school teachers to explore ideas on creative music teaching alongside members of BARE. An evening concert at New Wimbledon Theatre saw students from Merton Music Foundation choirs and combined Jazz Ensembles perform a variety of different Mingus compositions alongside members of Blues and Roots Ensemble.

Blues and Roots maintained its regular work with Wimbledon High School - creating a summer jazz night involving a variety of ensembles, hosted at the school's new auditorium and shared with students from Rutlish School (a local state secondary). BARE also delivered a workshop at Perseid SEND school, with students from three other local primaries invited to participate as part of the cluster schools initiative.

In addition to its education projects, Blues and Roots Ensemble presented two public performances. In March the band performed at The Spice of Life, Soho with guest singer Heidi
Vogel joining with the band for the first time. In June, BARE performed at the Exhibition Road Festival in partnership with the Royal Albert Hall.
These performances were used to build awareness of the work that Blues and Roots Ensemble does and to raise funds, with audience members invited to donate to the charity.

Projects and Performances

New Wimbledon Theatre Project

Video resources were created for primary school teachers of any musical ability to be able to play for their classes in preparation for watching and performing with the band.

The resources covered all of the introductory elements to understanding jazz and its history, as well as teaching 3 Mingus compositions - 2 to be sung and 1 to be performed using homemade percussion instruments.

The videos were recorded on 20th September 2022 and went live just before the October half-term in preparation for the November concert.

On November 14th the band performed morning and afternoon theatre shows to around 1700 students and staff, who had prepared the 3 pieces ahead of the event. This was followed by an evening concert with BARE joining students from Merton Music Foundation's various jazz ensembles. The project was coordinated by Merton Music Foundation with ACE funding through Wimbledon International Music Festival

The shows were a great success, with consistently excellent and helpful feedback from students and staff.

Theatre Resources Video 1



Theatre Show Highlights



Feedback

"*The best thing I've seen on stage for children in a long, long time.*" - *Headteacher*

"The trip was extraordinary because the music was full of passion and soul. My favourite part of the trip was learning Mingus' slave song 'Freedom'. We learnt about the history of slavery and jazz music and gained a new love for jazz. I really enjoyed jazz music and understood more about the roots of slavery and I learnt that jazz music was not always upbeat - it could also be quite sad and dark." - KS2 Student.

"To combine music with Civil rights, to get such great participation, to get such diversity on stage, encouraging all children to enjoy rhythms & sounds, & hopefully lead some towards playing instruments themselves, & give them the opportunity to hear exciting music live…inspirational! That's exactly the kind of experience we should be offering schools." - David Wood OBE, actor, author composer.

North & South Project

The members of Blues and Roots Ensemble devised a project to bring together primary school students from opposite sides of London, to perform in an established London concert venue. BARE was pleased to receive grants from Arts Council England and the Ronnie Scott's Charitable Foundation to fund the project. Partnerships with BARE, Camden Music Service and Merton Music Foundation helped to facilitate the activities by providing links with suggested schools.

2 schools from Merton and 2 schools from Camden were chosen to take part in the project, with each school receiving a full day and half day workshop to a full KS2 year group, as well as a whole school assembly. Goods Way venue then hosted 2 performance days, with 1 school from each borough taking part in a joint workshop and live-streamed concert.

The focus on the workshops was using Mingus' music to encourage creative music making with a focus on using instruments, rather than just voice. Classes performed on either tuned or untuned percussion, with one school also using this as an opportunity for their whole class brass programme. The workshops and performances also included elements of vocal improvisation from students and opportunities for students to present poetry they had written in response to jazz.

Behind the Scenes Footage from North & South



Performance Day Highlights



Feedback:

"*Really strong workshop content. Linked well with our school's current Black History Month celebrations. High quality musicianship. Great to have such skilled instrumentalists as role models for the children. All participants given a high quality musical experience." - Deputy Head, Holy Trinity S. Silas School.*

"*It was brilliant to see some of our less confident children engaged, participating and doing solos - wow!" - Class teacher, Merton Abbey Primary School.*

Maccabi House - SEN After School Centre - 23/2/23

3 workshop leaders from Blues and Roots Ensemble led a 2 hour session at an after school centre for students aged 9-21 with SEND. BARE invested in some colour- coded tuned percussion as well as untuned percussion instruments to help all students participate. There were some particularly moving moments within the session with one 15 year old female student with autism demonstrating such a strong sense of rhythm that she was able to play a swing pattern on the drum kit and hold a steady pulse to enable the whole group to work around her.

This was the first workshop in what BARE hopes will be a continued partnership with the team at Maccabi House.

Feedback:

"*Last night was a really great session. There was excellent engagement from our members, with the majority of people having an evening they will remember for a very long time, a good number of them taking part in a musical experience that will contribute to growing confidence and the potential for some to continue to pursue musical activities in the future [...] Moreover, you and your band's kind, encouraging, and challenging attitude towards SEN music facilitation was very much appreciated. Thank you!" - Charlie Coulson-Smith, Informal Educator*

Perseid and Cluster Schools Workshop - 3/3/23



4 BARE workshop leaders led a full day workshop with an afternoon performance at Perseid SEND school with 2 of its cluster school partners.

The main purpose of the workshop was to integrate pupils from the 3 schools and BARE led a series of activities and small group breakout sessions that included improvisation and movement in order to give all students the opportunity to bond.

The workshop included some new compositions that the band is introducing into its repertoire and the final performance was well supported by parents and staff from the schools.

Feedback:

"*Thanks for a great day. The kids enjoyed it as always." - Class teacher.*

Performance at The Spice of Life, Soho - 30/3/23

The band returned to the Spice to fill a last- minute slot that became available. It was a nice opportunity for the band to play all together and great to be able to sell out a club on less than 2 weeks' notice. The event was also the first to showcase another jazz composer writing protest music, with a composition by Abdullah Ibrahim arranged by Pete Letanka. Heid Vogel was featured as a guest vocalist with BARE for the first time.

Noddin' Ya Head Blues - Live at the Spice



Workshop/Performance with King's College School, Wimbledon - 5/5/23

The Friday afternoon community jazz initiative at KCS involves their students being guided by a professional jazz musician to learn a set of simple jazz pieces and explore teaching strategies to help them teach the pieces making them accessible for primary school students. The KCS tutor on the programme, Tommy Andrews, is also a musician who regular performs and teaches with BARE so the 2 groups were able to join together. Members of BARE joined for 2 Friday afternoon workshops at KCS and on the 3rd week the school hosted around 300 primary school pupils for a guided performance and jazz demonstration. This performance was as much led by students from KCS as it was the members from BARE and was a particularly effective style of community outreach from the school.

Great Exhibition Road Festival, Kensington - 18/6/23

Oh Lord Live at Exhibition Road



The band were invited to open the main stage of the Great Exhibition Road Festival on the Sunday. The event was a free festival showcasing science and music, with bands booked by the Royal Albert Hall.

Wimbledon High School/Rutlish Workshop & Concert - 27/6/23

BARE returned to Wimbledon High School for another joint concert with the school choir, jazz ensemble and including 15 students from Rutlish, the local state secondary school. The new Director of Music at Wimbledon High wanted to make the concert a feature of the summer programme, combining various different school ensembles and planning creative ways to utilise the school's new performance space.



The day itself included a 4-6pm workshop followed by a 7pm concert, with an audience of around 140. It was particularly heart-warming to see so many parents from Rutlish attend the concert .

Feedback:

"Thanks so much for coming in with BARE. So many people have said how much they enjoyed the evening, and the band were brilliant in their interactions with the students and their playing." - Director of Music, Wimbledon High School.

Looking Ahead

Blues and Roots Ensemble is excited to launch significant new projects in 2023/2024, as well as continuing to embed its work with established partners.

New Wimbledon Theatre Show 2023 with New Resources
Following on from the success of the first primary school show at Wimbledon Theatre, Blues and Roots Ensemble is excited to continue its partnership with Merton Music Foundation and create a new set of free to access, online resources for a second theatre show in October 2023.

Secondary School Partnership Workshop
In a similar outline to the workshop model that Blues and Roots has with Wimbledon High School, BARE has created a set of workshops for secondary schools that also include local primary, feeder schools. The workshop day will include a morning and afternoon session at the primary school, followed by a twilight session with the secondary school and evening concert featuring all ensembles. BARE is excited to able to pilot this programme at Colfe's School in London in September.

Wimbledon International Music Festival 2024
The band has been given the main jazz performance slot in the Wimbledon International Music Festival 2024 and looks forward to performing in a programme that includes a host of other internationally renowned artists.

Royal Albert Hall 2024 - with Merton Music Foundation
Blues and Roots Ensemble will join members of Merton Music Foundation at the Royal Albert Hall to perform the premier of "Turning Point", a suite of music written by Pete Churchill and Adam Saunders for massed choir. The concert will also give BARE the opportunity to perform one of its original Mingus arrangements with the massed choir of around 1300 young music pupils and amateur singers.

New Partnerships
BARE is excited to present a new partnership with its pianist Pete Letanka. Pete is a world renowned workshop leader, composer and pianist. The partnership will give BARE the opportunity to expand its repertoire and begin some collaborations with orchestras and larger musical institutions. The first project in planning is "Leicester Leaps Out" in partnership with Sinfonia Viva and Leicestershire Music.

Structure, Governance and Management

Structure

The charity is a CIO and was registered on 26th November 2020.

Governance

The charity is governed by a board of trustees which encompasses a range of experience and skill sets. The current membership provides expertise in finance, governance, risk management, monitoring and evaluation and music education. The Board is committed to strengthening its governance by recruiting additional trustees with a broad range of skills, expertise and lived experience. This is an ongoing process.

The trustees are responsible for preparing the financial statements in accordance with applicable law, including United Kingdom generally accepted accounting practice (UK GAAP)and the methods and principles in the Charities SORP. The trustees are also responsible for keeping adequate accounting records that are sufficient to show and explain the charity's transactions and disclose with reasonable accuracy at any time the financial position of the charity. They take responsibility for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Trustees are actively engaged in the charity's activities in addition to meeting regularly during the year.

Principal risks and uncertainties

The risks and uncertainties faced by Blues and Roots Ensemble are reviewed on an ongoing basis by the trustees. The principal risk has been identified as income generation to support the stability and growth of the charity in the medium and longer term. The recruitment of additional trustees to enhance the skills and expertise of the Board is also a priority.

Management

The charity has no employees, and payments for administrative services are made on the basis of a percentage of fees received.

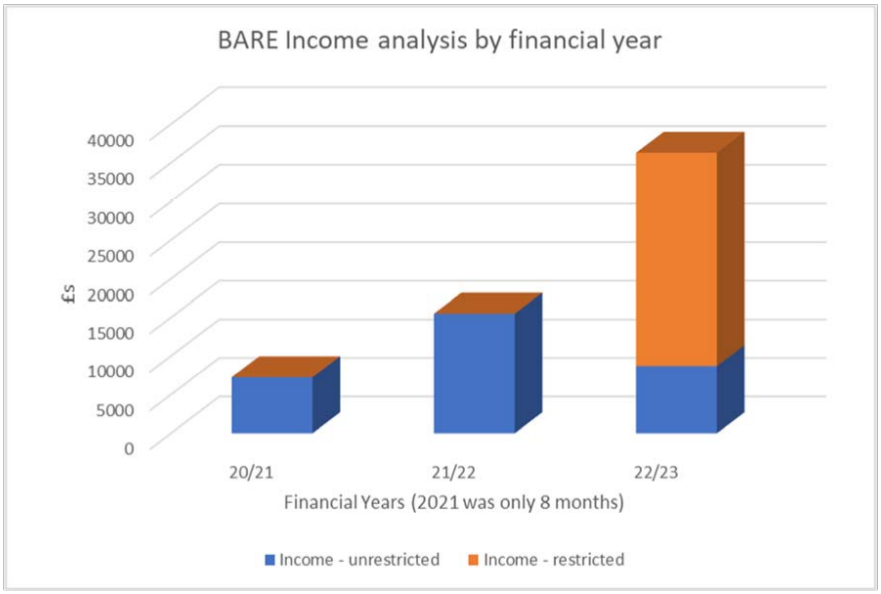
The charity has put in place a safeguarding policy and a code of conduct, which are enforced via a contract with every musician that works for the charity.

Financial Review

The accounts have been prepared on an accruals and prepayment basis and in accordance with the Statement of Recommended Practice (SORP FRS 102), governing accounting practices for charities.

The Charities Act 2011 ii) defining incoming resources are recognised as follows:

- Performance fees, ticket income and programme income: in the period in which the performance takes place.
- Donations: in the period in which the donation is received.
- Gift Aid: in the period in which the associated donation is received, provided the charity is sufficiently certain that the donation fulfils all of the necessary requirements for a gift aid claim to be submitted in due course.



In 2022/23 the charity's income was £36,853 (2021/22: £15,489).

There were two restricted fund projects in 22/23:

1. Restricted funds of £15,364 from the Arts Council England and £3,000 from the Ronnie Scott's Charitable Foundation were received for the "North and South" Project with an underspend of £461.

2. Restricted funds of £9,250 were received from Wimbledon International Music Festival for the New Wimbledon Theatre Project with an underspend of £24.

Both restricted underspends will be carried forward to 23/24 as restricted and permission will be sought from the donors to apply the funds to similar projects.

The charity has no assets other than cash in an account with CAF Bank. As of 31st July 2023 the charity's unrestricted funds stood £5,735.

The charity has a bank account with CAFbank opened in March 2021 and the balance on the 31st July 2023 was £7,220 and on 31st July 2022 was £3,291.

The charity had no assets other than cash in the bank for all reported years and no employees.

The charity aims to maintain free reserves of £2,000 after any liabilities at all times.

Dave Greening
May 29th 2024

CHARITY COMMISSION FOR ENGLAND AND WALES

Blues and Roots Ensemble			Charity No (if any)	1192545	
Annual accounts for the period					
Period start date	01/08/2022	To	Period end date	31/07/2023	

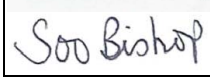
Section A Statement of financial activities

Recommended categories by activity	Guidance Notes	Unrestricted funds £ F01	Restricted income funds £ F02	Endowment funds £ F03	Total funds £ F04	Prior year funds £ F05
Incoming resources (Note 3)						
Income and endowments from:						
Donations and legacies	S01	535	-	-	535	501
Charitable activities	S02	8,689	27,613	-	36,302	14,988
Other trading activities	S03	-	-	-	-	-
Investments	S04	-	-		-	-
Separate material item of income	S05	-	-	-	-	-
Other	S06	16	-	-	16	-
Total	S07	9,240	27,613	-	36,853	15,489
Resources expended (Note 6)						
Expenditure on:						
Raising funds	S08	-	-	-	-	-
Charitable activities	S09	6,119	17,702	-	23,821	12,895
Separate material item of expense	S10	230	6,768	-	6,998	1,099
Other	S11	277	2,658	-	2,935	96
Total	S12	6,626	27,128	-	33,754	14,090
Net income/(expenditure) before investment gains/(losses)	S13	2,614	485	-	3,099	1,399
Net gains/(losses) on investments	S14	-	-	-	-	-
Net income/(expenditure)	S15	2,614	485	-	3,099	1,399
Extraordinary items	S16	-	-	-	-	-
Transfers between funds	S17	-	-	-	-	-
Other recognised gains/(losses):						
Gains and losses on revaluation of fixed assets for the charity's own use	S18	-	-	-	-	-
Other gains/(losses)	S19	-	-	-	-	-
Net movement in funds	S20	2,614	485	-	3,099	1,399
Reconciliation of funds:						
Total funds brought forward	S21	3,121	-		3,121	1,722
Total funds carried forward	S22	5,735	485	-	6,220	3,121

Section B Balance sheet

		Guidance Notes	Unrestricted funds £	Restricted income funds £	Endowment funds £	Total this year £	Total last year £
Fixed assets			F01	F02	F03	F04	F05
Intangible assets	**(Note 15)**	B01	-	-	-	-	-
Tangible assets	**(Note 14)**	B02	-	-	-	-	-
Heritage assets	**(Note 16)**	B03	-	-	-	-	-
Investments	**(Note 17)**	B04	-	-	-	-	-
	Total fixed assets	B05	-	-	-	-	-
Current assets							
Stocks	**(Note 18)**	B06	-	-	-	-	-
Debtors	**(Note 19)**	B07	-	-	-	-	-
Investments	**(Note 17.4)**	B08	-	-	-	-	-
Cash at bank and in hand	**(Note 24)**	B09	5,735	1,485	-	7,220	3,291
	Total current assets	B10	5,735	1,485	-	7,220	3,291
Creditors: amounts falling due within one year	**(Note 20)**	B11		1,000	-	1,000	170
	Net current assets/(liabilities)	B12	5,735	485	-	6,220	3,121
	Total assets less current liabilities	B13	5,735	485	-	6,220	3,121
Creditors: amounts falling due after one year	**(Note 20)**	B14	-	-	-	-	-
Provisions for liabilities		B15	-		-	-	-
Total net assets or liabilities		B16	5,735	485	-	6,220	3,121
Funds of the Charity							
Endowment funds	**(Note 27)**	B17	-			-	-
Restricted income funds	**(Note 27)**	B18		485		485	-
Unrestricted funds		B19	5,735		-	5,735	3,121
Revaluation reserve		B20				-	
	Total funds	B21	5,735	485	-	6,220	3,121

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

Signature	Print Name	Date of approval dd/mm/yyyy
	David Greening - Trustee	30/05/2024
	Soo Bishop - Chair of Trustees	30/05/2024

Section C Notes to the accounts

Note 1 **Basis of preparation**

This section should be completed by all charities.

1.1 Basis of accounting

These accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant note(s) to these accounts.

The accounts have been prepared in accordance with:

• and with*	✓	the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014
• and with*	✓	the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102)

• and with the Charities Act 2011.

The charity constitutes a public benefit entity as defined by FRS 102.*	✓

* -Tick as appropriate

1.2 Going concern

If there are material uncertainties related to events or conditions that cast significant doubt on the charity's ability to continue as a going concern, please provide the following details or state "Not applicable", if appropriate:

An explanation as to those factors that support the conclusion that the charity is a going concern;	***Music projects are costed and the fees are agreed in advance so there is little chance of creating a deficit from a project; the charity is very simple.***
Disclosure of any uncertainties that make the going concern assumption doubtful;	
Where accounts are not prepared on a going concern basis, please disclose this fact together with the basis on which the trustees prepared the accounts and the reason why the charity is not regarded as a going concern.	

1.3 Change of accounting policy

The accounts present a true and fair view and the accounting policies adopted are those outlined in note { }.

Yes*		* -Tick as appropriate
No*	✓	

Please disclose:

(i) the nature of the change in accounting policy;	
(ii) the reasons why applying the new accounting policy provides more reliable and more relevant information; and	
(iii) the amount of the adjustment for each line affected in the current period, each prior period presented and the aggregate amount of the adjustment relating to periods before those presented, 3.44 FRS 102 SORP.	

1.4 Changes to accounting estimates

No changes to accounting estimates have occurred in the reporting period (3.46 FRS 102 SORP).

Yes*		* -Tick as appropriate
No*	✓	

Please disclose:

(i) the nature of any changes;	
(ii) the effect of the change on income and expense or assets and liabilities for the current period; and	
(iii) where practicable, the effect of the change in one or more future periods.	

1.5 Material prior year errors

No material prior year error have been identified in the reporting period (3.47 FRS 102 SORP).

Yes*		* -Tick as appropriate
No*	✓	

Please disclose:

(i) the nature of the prior period error;	
(ii) for each prior period presented in the accounts, the amount of the correction for each account line item affected; and	
(iii) the amount of the correction at the beginning of the earliest prior period presented in the accounts.	

Section C **Notes to the accounts** **(cont)**

Note 20 Creditors and accruals

Please complete this note if the charity has any creditors or accruals.

20.1 Analysis of creditors

	Amounts falling due within one year		Amounts falling due after more than one year	
	This year £	Last year £	This year £	Last year £
Accruals for grants payable	-	-	-	-
Bank loans and overdrafts	-	-	-	-
Trade creditors	-	-	-	-
Payments received on account for contracts or performance-related grants	-	-	-	-
Accruals and deferred income	-	-	-	-
Taxation and social security	-	-	-	-
Other creditors	1,000	170	-	-
Total	1,000	170	-	-

20.2 Deferred income

Please complete this note if the charity has deferred income.

This year	Last year

Please explain the reasons why income is deferred.

Movement in deferred income account

	This year £	Last year £
Balance at the start of the reporting period	-	-
Amounts added in current period	-	-
Amounts released to income from previous periods	-	-
Balance at the end of the reporting period	-	-

Section C **Notes to the accounts** **(cont)**

Note 24 **Cash at bank and in hand**

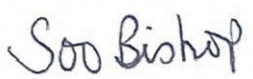
	This year £	Last year £
Short term cash investments (less than 3 months maturity date)	-	-
Short term deposits	-	-
Cash at bank and on hand	7,220	3,291
Other	-	-
Total	7,220	3,291

Declarations

On behalf of the trustees Blues and Roots Ensemble would like to thank all those who supported projects over the year, in particular Arts Council England, The Ronnie Scott's Charitable Foundation and Wimbledon International Music Festival.

The trustees declare that they have approved the report above.

SIGNED ON BEHALF OF THE TRUSTEES



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Soo Bishop - Chair of Trustees

Date: 31st May 2024