

PHOENIX SAXOPHONE ORCHESTRA

England & Wales · Charity number 1196946

Details

Status Registered

Legal form CIO

Registered 2021-12-06

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

Contact

Address 14 Church Lane
Long Clawson
Melton Mowbray
Leicestershire
LE14 4ND

Phone 01664822751

Email mail@phoenixsax.org.uk

Website phoenixsax.org.uk

Activities

Objects: TO ADVANCE, IMPROVE, DEVELOP AND MAINTAIN PUBLIC EDUCATION IN, AND APPRECIATION OF, THE ART AND SCIENCE OF MUSIC IN ALL ITS ASPECTS BY ANY MEANS THE TRUSTEES SEE FIT, INCLUDING THROUGH THE PRESENTATION OF PUBLIC CONCERTS AND RECITALS.

Activities: The objects of the CIO are to advance, improve, develop and maintain public education in, and appreciation of, the art and science of music in all its aspects by any means the trustees see fit, including through the presentation of public concerts and recitals. We operate primarily in Leicestershire and Northamptonshire.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** Arts/culture/heritage/science
- **Who:** The General Public/mankind

Geography

- Leicestershire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-01-31	£6,475	£4,560	-	-
2024-01-31	£10,991	£8,888	-	-
2023-01-31	£6,593	£3,211	-	-

Trustees

Name	Role	Appointed
STEPHEN BASHFORTH	Chair	2021-12-06
Anne Frances Hanson		2024-07-18
Dr Elizabeth Mary Pearce		2021-12-06
Jane Elizabeth Smith		2021-12-06

PHOENIX SAXOPHONE ORCHESTRA

England & Wales - Charity number 1196946

Accounts



Trustees' Annual Report
for the period
1 January 2024 to 31 December 2024

Charity Name: Phoenix Saxophone Orchestra CIO

Charity registration number: 1196946

Objectives and activities

The objects of Phoenix Saxophone Orchestra CIO are to advance, improve, develop and maintain public education in, and appreciation of, the art and science of music in all its aspects by any means the trustees see fit, including through the presentation of public concerts and recitals.

Our mission is to enjoy, celebrate and advance the art of music, for our members, our community and our audiences.

This involves:

- Advancing the art of music through rehearsal and performance of a varied repertoire.
- Making music together for fun, enjoyment, social interaction and social engagement.
- Supporting and helping members to develop their musicianship.
- Enjoying playing the saxophone across a range of different musical styles.
- Performing music, entertaining and promoting the versatility of the saxophone to a community audience.

The charity's Trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and performance

Throughout the reporting period, Phoenix Saxophone Orchestra (PSO/the Charity/the Orchestra) has ably fulfilled its objectives (of advancing, improving, developing and maintaining the public's appreciation of music) and has contributed to the financial resources of charities by the following activities.

- The Orchestra held 23 rehearsals comprising 51 hours of rehearsal time within the reporting period, enabling our members to develop and improve their playing ability.
- The Orchestra hosted a workshop with jazz musician Dan Forshaw in March, attended by approximately 30 people, many who were not members of Phoenix Saxophone Orchestra.
- The Orchestra performed nine live performances in 2024.
 - The highlight of the year was the concert at St Hugh's Church, Market Harborough on 24 November with our Patron Gerard McChrystal. Gerard performed a selection of solo pieces and joined Phoenix Saxophone Orchestra as soloist in a performance of "Concertino" by Michael Orlovich, a technically challenging piece of music that significantly developed members' musicianship.
 - The Orchestra's 2024 performance programme included four fundraising concerts that helped raise more than £2,500 for local charities and good causes, namely: the St Mary Magdalene Church clock restoration project (Cottingham, Northants); the St Hugh's Church Cygnet Project (Market Harborough); St Helen's Church, Sibbertoft, and Desborough Library and Community Hub.
 - We gave four concerts in park bandstands: Western Park, Leicester; New Park, Melton Mowbray; Rockingham Road Pleasure Park, Kettering; and Abington Park. We also supported Friends of West Hunsbury Park, performing in Hunsbury Hill Country Park as part of their summer programme of activities. Each audience appreciated our music.

- All these concerts gave the public greater appreciation of music and the range of styles of music that the saxophone can perform.

Financial review

- The Charity is financially sound. In the reporting period income was £6475 and expenditure was £4560.
- The Charity holds reserves to mitigate the risk of loss of members and hence income, to provide funds for growing music repertoire, and to support music outreach through concert tours beyond the Midlands.
- The current reserve against loss of membership and committed expenditure at 31 December 2024 is £3500, and a reserve of £2,500 is held towards enabling members to perform in a joint concert with Saxophone Orchestra Manchester, and to participate in a concert tour to Isle of Wight, in 2025. Members pay subscriptions in advance, so the current bank balance includes reserves and subscriptions income for the first term of 2025.
- The benefit from concert performances has enabled the Orchestra to avoid increasing its subscription which could otherwise have disadvantaged some members.
- As at 31 December 2024, the Charity has no known uncertainties about continuing as a going concern.

Additional information

The Charity's principal income is its members' subscriptions, followed by income from concerts, workshops and any donations. The Charity has lost some members and gained new members during the reporting period, with the net impact being an increase to 16 performing members as at 31 December 2024.

The Charity's principal costs are the cost of rehearsal venue and Musical Director fees.

The primary risk faced by the Charity is loss of income due to loss of members (for which there are many potential causes relating to work, health, and family demands). The second risk faced by the Charity is a knock-on impact of a loss of members – namely finding new members of an appropriate playing standard and who fit in with a small ensemble so the Charity can continue performing its repertoire to its current high standards.

Structure, governance and management

Phoenix Saxophone Orchestra CIO was established on 6 December 2021.

Phoenix Saxophone Orchestra is a charitable incorporated organisation (CIO) and is governed by a constitution (Association Model).

- The Charity has a Safeguarding policy.
- The Charity is a member of Making Music and has Bronze insurance which includes public liability insurance.
- The Charity maintains a website, Facebook page, X profile and YouTube Channel and promotes its activities in local, regional and specialist media including online print, radio and television to support the public's awareness and appreciation of music, and our contribution thereto.
- Judith Allen resigned as Trustee and Secretary on 31 August 2024. Anne Hanson became Trustee and Secretary on X date 2024.

Reference and administrative details

Charity name: Phoenix Saxophone Orchestra CIO

Registered charity number: 1196946

Principal address: 14, Church Lane, Long Clawson, Melton Mowbray LE14 4ND

Charity trustees:

- Dr Stephen Bashforth, Chair
- Judith Allen, Secretary (to 31 August 2024)
- Anne Hanson, Secretary (from date 2024)
- Dr Elizabeth Pearce, Treasurer
- Jane Smith, Communications Director

Declaration

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

Signed on behalf of the Charity's trustees

Name

Position

Date



Summary – Income and Expenditure

1st Jan 2024 – 31st Dec 2024

	2023		2024		Balance
	Income	Expenditure	Income	Expenditure	
Bank Balance 1 Jan 2024					5485.86
Joining Fees	100.00		80.00		
Subscriptions	3320.00		2720.00		
Performances	2546.00		2985.25		
Workshops (1)	1350.00	695.00	690.00	355.80	
Musical Director Fees		2178.77		2470.62	
Rehearsal Hall Fees		979.50		864.00	
Deputies		150.00		360.00	
Tour (2)	3584.67	4344.75			
Making Music (3)		183.24		208.24	
Music Purchase		200.49		19.19	
Barclays Bank (4)	50.00				
Sundries (5)	40.43	155.77		281.77	
Totals	10991.10	8887.52	6475.25	4559.62	
Bank Balance 31 Dec 2024					7401.49

Notes:

1. 2023 figure includes deposit for Dan Forshaw workshop Mar 2024
2. Summary of all transactions relating to the 2023 tour
3. Membership Fees, Insurance and PRS Fees
4. Goodwill payment in acknowledgement of the bank's delay in processing replacement signatory
5. Including Marketing and Promotion

PHOENIX SAXOPHONE ORCHESTRA

England & Wales - Charity number 1196946

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Trustees' Annual Report
for the period
31 December 2022 to 31 December 2023

Charity Name: Phoenix Saxophone Orchestra CIO

Charity registration number: 1196946

Objectives and activities

The objects of Phoenix Saxophone Orchestra CIO are to advance, improve, develop and maintain public education in, and appreciation of, the art and science of music in all its aspects by any means the trustees see fit, including through the presentation of public concerts and recitals.

Our mission is to enjoy, celebrate and advance the art of music, for our members, our community and our audiences.

This involves:

- Advancing the art of music through rehearsal and performance of a varied repertoire.
- Making music together for fun, enjoyment, social interaction and social engagement.
- Supporting and helping members to develop their musicianship.
- Enjoying playing the saxophone across a range of different musical styles.
- Performing music, entertaining and promoting the versatility of the saxophone to a community audience.

The charity's Trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and performance

Throughout the reporting period, Phoenix Saxophone Orchestra (PSO/the Charity) has ably fulfilled its objectives (of advancing, improving, developing and maintaining the public's appreciation of music) by the following activities.

- Our members have improved their playing ability as a result of rehearsals throughout the year; a series of concert performances to a wide range of audiences and workshops from Gerard McChrystal (Professor of Saxophone at Trinity Laban Conservatoire), and Mick Foster (a professional saxophonist and member of staff at Trinity Laban Conservatoire and at the Guildhall School of Music and Drama). The Orchestra had breaks around Easter, the Summer and Christmas.
- The Orchestra held 24 rehearsals within the reporting period.
- The orchestra hosted workshops from Mick Foster in February and Gerard McChrystal in November each attended by around 30 people, many who were not members of Phoenix Saxophone Orchestra.
- The Orchestra performed 11 live performances in 2023.
- The highlight of the year was the planned tour to Aberdeenshire to join up with the Aberdeenshire Saxophone Orchestra and give two concerts, one in Aberdeen and one in Inverurie.
- The Orchestra gave concerts to raise funds for local charities at St Hugh's Church, Market Harborough, St Helen's Church, Sibbertoft and in Desborough Library.
- We gave 4 concerts in park bandstands: Evington Park, Leicester; New Park, Melton Mowbray; Rockingham Road Pleasure Park, Kettering; and in the grounds of Newark Castle, Nottinghamshire. Each audience appreciated the music.

- The Orchestra were delighted to perform at Southwell Minster in its music festival and to be invited to make a return appearance in the Harrington Summer Music programme in St Peter and St Paul's Church, Harrington, Northamptonshire.
- All these concerts gave the public greater appreciation of music and the range of styles of music that the saxophone can perform.
- Our relationship with eminent saxophonists is growing as a result of our public profile, performances and the publicity therefrom. Mick Foster, composed a piece of music especially for PSO which was first performed in the open saxophone workshop for the group in February 2023, and is now a piece in our concert repertoire.

Financial review

- The Charity is financially sound. In the reporting period income was £10,990 and expenditure was £8890. These figures are higher than last year and the result of undertaking the tour to Aberdeenshire.
- The Charity holds reserves to mitigate the risk of loss of members and hence income, to provide funds for growing music repertoire, and to support music outreach through concert tours beyond the Midlands.
- The current reserve against loss of membership at 31 December 2023 is £3400, and a reserve of £2000 is held towards enabling members to perform in a joint concert with Saxophone Orchestra Manchester and to support members ability to participate in a concert tour to Isle of Wight. Members pay subscriptions in advance, so the current reserve is equal to the cash in hand (bank balance) minus expected operational expenses for the first term of 2024.
- The benefit from concert performances has enabled the Orchestra to avoid increasing its subscription which could otherwise have disadvantaged some members.
- As at 31 December 2022, the Charity has no known uncertainties about continuing as a going concern.

Additional information

The Charity's principal income is its members' subscriptions, followed by income from concerts, workshops and any donations. The Charity has maintained steady membership levels throughout the reporting period, with 15 performing members as at 31 December 2023.

The Charity's principal costs are the cost of rehearsal venue and Musical Director fees.

The primary risk faced by the Charity is loss of income due to loss of members (for which there are many potential causes relating to work, health, and family demands). The second risk faced by the Charity is a knock-on impact of a loss of members – namely finding new members of an appropriate playing standard and who fit in with a small ensemble so the Charity can continue performing its repertoire to its current high standards.

Structure, governance and management

Phoenix Saxophone Orchestra CIO was established on 6 December 2021.

Phoenix Saxophone Orchestra is a charitable incorporated organisation (CIO) and is governed by a constitution (Association Model).

- The Charity has a Safeguarding policy.

- The Charity is a member of Making Music and has Bronze insurance which includes public liability insurance.
- The Charity maintains a website, Facebook page, Twitter profile and YouTube Channel and promotes its activities in local, regional and specialist media including online print, radio and television to support the public's awareness and appreciation of music, and our contribution thereto.

Reference and administrative details

Charity name: Phoenix Saxophone Orchestra CIO

Registered charity number: 1196946

Principal address: 14, Church Lane, Long Clawson, Melton Mowbray LE14 4ND


Charity trustees:

- Dr Stephen Bashforth, Chair
- Judith Allen, Secretary
- Dr Elizabeth Pearce, Treasurer
- Jane Smith, Communications Director

Declaration

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

Signed on behalf of the Charity's trustees


Name STEPHEN BASHFORTH
Position CHAIRMAN
Date 17 March 2024.



Summary – Income and Expenditure

1st Jan 2022 – 31st Dec 2023

	2022		2023		Balance
	Income	Expenditure	Income	Expenditure	
Bank Balance 1 Jan 2023					3382.29
Joining Fees	40.00		100.00		
Subscriptions	3640.00		3320.00		
Performances	1365.00		2546.00		
Workshops (1)	660.00	400.00	1350.00	695.00	
Musical Director Fees		1720.00		2178.77	
Rehearsal Hall Fees		801.00		979.50	
Deputies				150.00	
Tour (2)			3584.67	4344.75	
Making Music (3)		206.90		183.24	
Music Purchase		178.21		200.49	
PSO Ltd. Expenses		13.00			
Barclays Bank		(4) 34.00	(5) 50.00		
Sundries (6)	11.99	216.74	40.43	155.77	
Totals	5716.99	3569.85	10991.10	8887.52	
Bank Balance 31 Dec 2023					5485.87

Notes:

1. Includes deposit for Dan Forshaw workshop Mar 2024
2. Summary of all transactions relating to the tour, including MD fees and accommodation expenses, performance income, travel costs etc.
3. Membership Fees, Insurance and PRS Fees
4. Final charges in respect of PSO Ltd
5. A goodwill payment in acknowledgement of the bank's delay in processing Judith as a replacement signatory for Jonathan
6. Including Marketing and Promotion

PHOENIX SAXOPHONE ORCHESTRA

England & Wales - Charity number 1196946

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Trustees' Annual Report
for the period
6 December 2021 to 31 December 2022

Charity Name: Phoenix Saxophone Orchestra CIO

Charity registration number: 1196946

Objectives and activities

The objects of Phoenix Saxophone Orchestra CIO are to advance, improve, develop and maintain public education in, and appreciation of, the art and science of music in all its aspects by any means the trustees see fit, including through the presentation of public concerts and recitals.

Our mission is to enjoy, celebrate and advance the art of music, for our members, our community and our audiences.

This involves:

- Advancing the art of music through rehearsal and performance of a varied repertoire.
- Making music together for fun, enjoyment, social interaction and social engagement.
- Supporting and helping members to develop their musicianship.
- Enjoying playing the saxophone across a range of different musical styles.
- Performing music, entertaining and promoting the versatility of the saxophone to a community audience.

The charity's Trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and performance

Throughout the reporting period, Phoenix Saxophone Orchestra (PSO/the Charity) has ably fulfilled its objectives (of advancing, improving, developing and maintaining the public's appreciation of music) by the following activities.

- The Orchestra held 25 rehearsals within the reporting period.
- Our members have improved their playing ability as a result of the rehearsals throughout the year, with breaks around Easter, the Summer and Christmas. Our repertoire grew to enable performances of up to 100 minutes of music, with the arrangements fully using all sections of the orchestra. This was a major achievement for the orchestra and its players, demonstrating how well the Charity has developed its collective musical ability, especially as the orchestra (like many other groups) had been severely constrained in its ensemble playing throughout the 2020-2021 period due to Covid lockdowns and limitations on group activities.
- The orchestra secured live performances at six venues over the summer: Evington Park, Leicester; Hollycroft Park, Hinckley; New Park, Melton Mowbray; Rockingham Road Pleasure Park, Kettering; Richmond Retirement Village, Northampton; and Harrington Church, Northamptonshire. All these concerts gave the public greater appreciation of music and the range of styles of music that the saxophone can perform. Richmond Retirement Village lays on a regular on-site entertainment programme to make live music accessible for its residents, and our performance as part of this programme was greatly appreciated by all concerned. The concert at Harrington Church was also significant in that PSO was invited to perform as part of a well-established and well-regarded summer music programme, the Harrington Concert Series.
- Our Patron, Gerard McChrystal (a professor of saxophone at RWCMD, the Royal Welsh College of Music and Drama) ran a workshop in November 2022 for 20 attendees from a wide geographic catchment area. The workshop focused on music that was generously provided for the day by Saxtet Publications, a sponsor of Phoenix Saxophone Orchestra.

All attendees appreciated the day of music making and the improvements to their musicianship as a direct result of participating in the workshop.

- Our relationship with Aberdeenshire Saxophone Orchestra has been sustained and a concert tour to Aberdeenshire is being planned for 2023, taking our music outreach to new audiences.
- Our relationship with eminent saxophonists is growing as a result of our public profile, performances and the publicity therefrom. In 2022, we were given repertoire by Richard Percival, an Australian saxophonist and composer, John Holland and Mick Foster, who has composed a piece of music especially for PSO and will also be running an open saxophone workshop for the group in February 2023.

Financial review

- The Charity is financially sound. In the reporting period, income was £6593 and expenditure was £3211.
- The Charity has a Financial Reserves Policy which, as its primary objective, addresses the need to mitigate the risk of loss of members and hence income. Additional financial reserves, needed to meet the objectives of the Charity and to mitigate additional specific risks, are described below.
- The reserve held at 31 December 2022 is £2717. Members pay subscriptions in advance, so the current reserve is equal to the cash in hand (bank balance) minus expected operational expenses for the first term of 2023.
- The minimum reserve set by the Financial Reserves Policy is £1700.
- Further reserves are needed for the financial year 1 Jan 2023 to 31 Dec 2023. A financial reserve is needed to cover MD's expenses fees with a planned concert performance tour to Aberdeenshire (1 to 5 June 2023) of £600 to cover 4 nights' hotel accommodation, rail fares and expenses. There may be opportunity to take benefit from promotional offers at the point of transaction, but the prudent approach is to base the reserve need is on published referenceable prices.
- The Charity has approximately 70 music scores stored electronically. If these were lost through hard drive crash or other event, at least some would likely need to be repurchased. A financial reserve of £400 is set to mitigate this risk.
- The Charity needs to further develop its repertoire to meet its objectives, and a financial reserve of £100 is set to meet this need in year 2023.
- As at 31 December 2022, the Charity has no known uncertainties about continuing as a going concern.

Additional information

The Charity's principal income is its members' subscriptions, followed by income from concerts, workshops and any donations. The Charity has maintained steady membership levels throughout the reporting period, with 15 performing members as at 31 December 2022.

The Charity's principal costs are the cost of rehearsal venue and Musical Director fees.

The primary risk faced by the Charity is loss of income due to loss of members (for which there are many potential causes relating to work, health, and family demands). The second risk faced by the Charity is a knock-on impact of a loss of members – namely finding new members of an appropriate playing standard and who fit in with a small ensemble so the Charity can continue performing its repertoire to its current high standards. These risks are addressed in the Financial Reserve Policy.

Structure, governance and management

Phoenix Saxophone Orchestra CIO was established on 6 December 2021.

Phoenix Saxophone Orchestra is a charitable incorporated organisation (CIO) and is governed by a constitution (Association Model).

- In November 2022, PSO held an Extraordinary General Meeting to (i) accept the resignation of Jonathan Shaw from the role of Trustee and Secretary, (ii) appoint Judith Allen as Trustee and Secretary, and (iii) agree a change to PSO's Members' Handbook to ensure compliance with the reporting requirements for PSO CIO and, in particular, to defer the AGM to Quarter 1 (January to March) each year.
- The Charity has a Safeguarding Policy.
- The Charity has a Financial Reserves Policy
- The Charity is a member of Making Music and has Bronze insurance which includes public liability insurance.
- The Charity maintains a website, Facebook page, Twitter profile and YouTube Channel and promotes its activities in local, regional and specialist media including online, print, radio and television to support the public's awareness and appreciation of music, and our contribution thereto.

Reference and administrative details

Charity name: Phoenix Saxophone Orchestra CIO

Registered charity number: 1196946

Principal address: 2 Southwold Close, Market Harborough, Leicestershire LE16 9GU

Charity trustees:

- Dr Stephen Bashforth, Chair
- Judith Allen, Secretary (from 1 December 2022)
- Dr Elizabeth Pearce, Treasurer
- Jonathan Shaw, Secretary (to 30 November 2022)
- Jane Smith, Communications Director

Declaration

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

Signed on behalf of the Charity's trustees



Name STEPHEN BASHFORTH

Position CHAIRMAN

Date

16 FEB 2023