



**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