



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