



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 01/08/2021 Period start date To 31/08/2022 Period
end date

Charity name: Portsmouth Choral Union

Charity registration number: 266974

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The objects of the Society will be to advance 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.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	After 18 months disrupted by Covid-19 which for much of the time made group singing impossible or set extreme restrictions, we were finally able to resume rehearsing and giving concerts in autumn 2021, albeit with continuing regard to recommendations for social distancing and other safety measures. Between August 2021 and July 2022 we were able to stage 4 full concerts, one of which was given as part of a series celebrating and supporting the Organ Restoration Project in St Mary's Church, Fratton, Portsmouth. We also held a Come and Sing with proceeds donated to Key Changes Music Therapy, a Winchester-based charity that uses music therapy to alleviate the emotional effects of mental illness, learning disability, social deprivation and developmental delay in children and adults.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have had regard to the Charity Commission guidance on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	N/A
Policy on social investment including program related investment	Para 1.38	N/A
Contribution made by volunteers	Para 1.38	The charity is entirely run by members on a voluntary basis
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>After such a disrupted year in 2020-2021, we were finally permitted to start indoors singing rehearsals again in autumn 2021 with a full risk assessment in place to reduce the risks of Covid-19 transmission. For our first concert piece of the term we chose Fauré's <i>Requiem</i>, which we had been rehearsing at times between lockdowns. We put on a small autumn concert with a reduced-size choir, as many of our members were not yet able to return to singing in concerts, and with a socially-distanced audience. It was exciting to be able to do a concert again and to see an audience enjoying our music after all the restrictions.</p> <p>We were encouraged to be more ambitious for our Christmas concert and perform Bach's <i>Christmas Oratorio</i>. This is a large work and normally we would have done a large November concert and not had time to rehearse this, so it made for a nice change. We were not sure until quite late that we would be able to do the concert, as there was concern about a new Covid variant and ticket sales were low. To our surprise we were able to go ahead and there was a big rush for tickets on the day,</p>

		<p>leaving us rushing to put out more chairs in distanced groups.</p> <p>In the spring our Music Director completed a retranslation of Joseph Haydn's <i>Seven Last Words of Our Saviour on the Cross</i>, with help from choir member and composer Ian Schofield in producing the newly-set arrangement. This work retells the end of the Easter story and was a first performance for the choir.</p> <p>By this stage we had been able to relocate from the church we were using for rehearsals before Christmas back to our usual pre-Covid school venue, having assessed how we might use it safely and with most of the choir having been vaccinated at least once. We felt we were adapting well to new ways of working for concerts as well although ticket sales continued to be unpredictable and the choir was still not back to full size. Although restrictions eased as the year advanced we were cautious, given the older age of many of our members and audience, and continued with some Covid precautions throughout the year.</p> <p>Our fourth concert of the year was planned to celebrate the newly refurbished organ in St Mary's Church, but technical problems pushed back its reconstruction and our concert was delayed until the end of July. So instead in June we held a Come and Sing Gilbert and Sullivan extravaganza, inviting other singers to come to rehearsals with us and then performing the full '<i>HMS Pinafore</i>' in semi-staged form with soloists from the choir led by Philip Blake-Jones from the former D-Oyley-Carte Opera Company. Sadly this was not attended as well as we had hoped but all those who came, including our guests, had a very good time and we were able to raise a considerable sum of money for Key Changes Music Therapy based in Winchester (<i>Registered Charity number 1124102</i>).</p> <p>We then held the organ concert in July with Vierne <i>Messe Solennelle</i>, Poulenc's <i>Organ Concerto</i>, Parry's <i>Hear my Words</i> and Bairstow's <i>Blessed City</i>, accompanied by Daniel Cook, Organist of Durham Cathedral.</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	In 2021-2022 we were able to get back to holding four concerts and a Come and Sing that gave audiences chance to hear live music performances again after an 18-month gap. We also found ways to offer opportunities to guests to come and enjoy singing with us and to raise money for a worthwhile music charity. Our core membership really appreciated the care we took to maintain safe conditions for all this and the chance to get back to making music together.
Performance of fundraising activities against objectives set	Para 1.41	The choir is heavily reliant on membership subscriptions and tickets sales. Due to Covid our membership was down by about 30%, with some members unable to return and normal recruitment much reduced. Ticket sales were also down, partly due to the requirements for social distancing and caution on the part of potential concert-goers. However we felt that we needed to get back to a full and ambitious concert programme to fulfil our choir's aims and reward those who could come. We also had not done as much forward planning as usual as the uncertainty of Covid had repeatedly disrupted our plans for 18 months making it difficult to plan effectively. We therefore had to use reserves to support this season's music making.
Investment performance against objectives	Para 1.41	
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Our policy is to try to hold one year's running costs in reserve. At the end of the previous period we were holding a slightly higher reserve than usual, but we had to use this to cover the current year when costs returned to normal but income did not..
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We aim to maintain the minimum of one season's running costs in hand to act as a reserve against years when concerts are more expensive and against unforeseen events.
Amount of reserves held	Para 1.22	£48,306.33
Reasons for holding zero reserves	Para 1.22	N/A

Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	We will need to be able to recruit more members and audience in the future to improve our income levels.

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Member subscriptions and (normally) ticket sales provide the majority of our income. We also receive donations from members and supporters and from the Portsmouth Lottery. We also have a 'Friends' scheme of supporters; in the year 2021- 2022 we identified that this needed a relaunch as it was no longer meeting our needs.
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	Our risks at present stem from the reduced size of the choir and audience due to Covid which is having a negative impact on our income whilst our outgoings are rising.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Written constitution dated 30 th January 2018
How is the charity constituted? (e.g unincorporated association , CIO)	Para 1.25	Unincorporated association
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	All Trustees are elected at our Annual General Meeting of members or by Extraordinary Vote of members following any mid-term resignations.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	All Trustees are made aware of their responsibilities under the law as Charity Trustees using guidance from the Charity Commission.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	We co-operate with other musical groups and other choral charities in the area to avoid clashes of concert dates as far as possible and to collaborate on selected projects
Relationship with any related parties	Para 1.51	N/A
Other		

Reference and Administrative details

Charity name	Portsmouth Choral Union
Other name the charity uses	PCU
Registered charity number	266974
Charity's principal address	21, Second Avenue, Emsworth, Hampshire, PO10 8HP

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Mr Philip Stokes	Chairman	To 4 th October 2022	
2	Mrs Jane Helliwell	Deputy Chair		
3	Dr Andrea Hegedus	Treasurer		
4	Mrs Sonia Schofield	Registrar		
5	Mrs Lois Houston	Marketing and Publicity Officer		
6	Dr Alison Barker	Secretary		
7	Mrs Rosemary Kerridge	Ticketing Manager	To 4 th October 2022	
8	Sylvia Mary Lock	Soprano Representative to 4 th October 2022, then Chair	From 4 th October 2022	
9	Carolyn Ann Keyzor	Soprano Representative	From 4 th October 2022	
10	Sarah Louise Spender	Alto Representative		
11	Mr John Cook	Tenor Representative		
12	Mr James Sweasey	Bass Representative		
	Note that some of these Trustees are current but have been appointed since the year covered by this report.			

Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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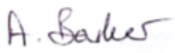

Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Alison Margaret Barker	Sylvia Mary Lock
Position (eg Secretary, Chair, etc)	Secretary	Chair
Date	27/04/23	

Portsmouth Choral Union
Receipts and payments
From 1st August 2021 to 31st July 2022

Section A Receipts and Payments						
				2021/2022		2020/2021
A1 Receipts						
Subscriptions			16,636.00			11,442.50
Sub donations			458.00			320.00
Donations and Sponsorship			1,266.00			394.50
Gift Aid			6,528.77			5,185.36
Fund Raising			0.00			0.00
Merchandise Sales			5.50			0.00
100 Club			0.00			0.00
E-Funding			693.13			122.49
Portsmouth Lottery			749.00			693.50
Income from Recordings			14.48			87.05
Income from Programmes			326.00			0.00
Income from Music Library			389.51			0.00
Income from Friends Subscriptions			295.00			0.00
Red Scarves			526.14			
Sundry			0.00			44.17
Interest from Investments/Savings			0.27			75.49
Bank Interest			0.00			0.00
				27,887.80		18,365.06
A2 Asset and Investment Sales						
A3 Payments						
Professional Fees			11,733.90			11,177.75
Donations			350.00			0.00
Hall Hire			2,049.51			534.34
Storage of Staging			0.00			1,470.00
Publicity			1,243.45			400.79
Sundries			610.06			585.20
Insurance			382.00			613.00
Bank Charges			200.00			162.00
Admin and Stationery			101.59			79.61
Bookkeeping / Accountancy			200.00			200.00
Loss from Investments/Savings			3,222.83			0.00
Deficit from Recordings			0.00			0.00
Deficit from Programmes			0.00			25.00
Deficit from Tour Refunds			0.00			34,430.00
Deficit from Concerts			16,508.33			500.00
				36,601.67		50,177.69
A4 Asset and Investment Purchases						
Net of Receipts/Payments				-8,713.87		-31,812.63
Balance B/Fwd from Previous Year				62,163.87		93,976.50
Fund Balance Carried forward				53,450.00		62,163.87

Portsmouth Choral Union
Assets and Liabilities
1st August 2021 to 31st July 2022

Section B Statement of Assets and Liabilities							
				2022		2021	
				Cost		Cost	
B1 Cash Funds							
CAF Cash Accounts (bank)				3,103.85		9,598.16	
CAF Gold Account (tour)				699.38		96.11	
Petty Cash				200.00		200.00	
B2 Other Monetary Assets							
Payments in Advance:		St Mary's		500.00		100.00	
B3 Investment Assets							
M & G Charibond				48,306.33		51,529.16	
B4 Assets Retained for the							
Charity's own use							
Keyboard (purchased 13/03/20)				678.58		678.58	
Compact audiohub (purchased 16/10/20)				311.86		311.86	
B5 Liabilities							
Accrual - PRS & Recordings				150.00		150.00	
Accrual - Bookkeeping				200.00		200.00	
Total of Assets less Liabilities				53,450.00		62,163.87	
Signatures							
(Signed by one or two trustees on behalf of all the trustees)							
Signature		Print Name		Approval Date			
S.M. Lock		SYLVIA LOCK		7.3.23			
A. Barker		ALISON BARKER		7.3.23.			



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees/
members of

THE PORTSMOUTH CHORAL UNION

On accounts for the year
ended

31ST JULY 2022

Charity no
(if any)

266974

Set out on pages

of the Treasurer's Annual Report to the
Trustees

I report to the trustees on my examination of the accounts of the above
charity ("the Trust") for the year ended DD / MM / YYYY.

Responsibilities and
basis of report

As the charity's trustees, you are responsible for the preparation of the
accounts in accordance with the requirements of the Charities Act 2011
("the Act").

I report in respect of my examination of the Trust's accounts carried out
under section 145 of the 2011 Act and in carrying out my examination, I
have followed all the applicable Directions given by the Charity Commission
under section 145(5)(b) of the Act.

Independent
examiner's statement

~~[The charity's gross income exceeded £250,000 and I am qualified to
undertake the examination by being a qualified member of [insert name of
applicable listed body]]. Delete [] if not applicable.~~

I have completed my examination. I confirm that no material matters have
come to my attention in connection with the examination (other than that
disclosed below *) which gives me cause to believe that in, any material
respect:

- the accounting records were not kept in accordance with section 130
of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements
concerning the form and content of accounts set out in the Charities
(Accounts and Reports) Regulations 2008 other than any requirement
that the accounts give a 'true and fair' view which is not a matter
considered as part of an independent examination.

I have no concerns and have come across no other matters in connection
with the examination to which attention should be drawn in this report in
order to enable a proper understanding of the accounts to be reached.

* Please delete the words in the brackets if they do not apply.

Signed:

J Przybycin

Date:

27/2/2023

Name:

JOANNE MICHELLE PRZYBYCIN

Relevant professional
qualification(s) or body

F. C. A

(CHARTERED ACCOUNTANT
ICAEW)

(if any):

Address:

18 PETERS ROAD

LOCKS HEATH

SOUTHAMPTON, SO31 6EQ

Section B

Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.