



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From **01/08/2023** Period start date To **31/08/2024** 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	In 2023-2024 we were back to a full normal schedule of rehearsals and concerts, although we needed to be more mindful of costs than before the pandemic and cost-of-living crises. It was a year of collaboration, with a joint concert in London with the Medici choir in December 2023 and another one with the Consort of 12 in Chichester in July 2024. And we had several open rehearsals and a Come and Sing event to allow non-members to come and enjoy the experience of singing in a big choir with us.
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	<b>N/A</b>

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. Many members regularly volunteer in roles in fundraising, behind-the-scenes organisation and helping with audiences and refreshments at events.
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>We started 2023-2024 very aware that the choir was down on numbers of members and that this was impacting both performances and finances. As a result we had a big recruitment drive with open rehearsals at which anyone who wanted could come and try singing with us. This added several members to the normal recruitment process, as did our <i>Carmina Burana</i> Come-and-Sing event in St Jude's Church, Southsea in January 2024. Our new format for this event, with an all-afternoon opportunity to learn and rehearse the piece followed by a communal tea and a short concert is proving very popular with members and visitors alike.</p> <p>Another decision for the year to was to be bold and choose to rehearse some popular works that are a bit more expensive to put on, again to attract singers but also to increase audiences. To this end our first concert of the year in early December was Verdi's <i>Requiem</i>, and we did it as a collaborative concert in Holy Trinity church, Sloane Square, London with the Medici Choir. The concert sold out and was much enjoyed by the choir and the audience.</p> <p>We followed it with Handel's <i>Messiah</i> as a Christmas concert in our normal venue, St Mary's Church in Portsmouth, with the full orchestra of Southern Pro Musica which also drew an appreciative audience.</p> <p>After Christmas we planned a slightly different format of two shorter spring</p>

		<p>concerts with organ and soloists. The first was the modern St John Passion by Bob Chilcott, a work consciously referencing the great Bach St John Passion but with a modern style and sensibility. Solos from Nicholas Sharratt as the Evangelist and Johnny Herford as Christ told the story while the choir acted as crowd and the audience joined in with hymns woven into the piece's structure in a truly involving work.</p> <p>Our second short concert was a selection of English anthems followed by Duruflé's <i>Requiem</i> accompanied on the St Mary's organ by our Deputy Music Director and Organist Ian Richardson. A proportion of the choir then undertook a tour of Brittany with the same programme, performing in the very different soundscape of Quimper cathedral. The tour, as all previous tours, was self-financed by payments from the attendees and did not use the choir's charitable funds, although the retiring collection made at the concert was donated back to the choir.</p> <p>Our final concert of the year was another collaboration, this time Handel's less well-known Oratorio <i>Saul</i>, performed with the early-music orchestra the Consort of 12. The concert was part of the Chichester Festival and performed in St Paul's church Chichester. The performance really came alive with the well-trained singing of the choir, the skilled accompaniment from the orchestra and the expert dramatic performances of the soloists. This sadly was our farewell performance with Ian Richardson who is leaving to take up a new post; luckily we have been able to secure the service of a new Deputy Music Director and accompanist who joins us in the autumn.</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	<p>In 2023-2024 we held five concerts and a Come and Sing that gave audiences chance to hear live classical music performances from eras ranging from the Baroque to the 21<sup>st</sup> Century. We also found ways to offer opportunities to guests to come and enjoy singing with us and collaborated with a London choir and an early-music orchestra. We worked hard to keep this close to our annual budget.</p>
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Performance of fundraising activities against objectives set	Para 1.41	The choir is heavily reliant on membership subscriptions and tickets sales. We also hold in-house fundraising events but find it hard to fundraise externally. We have managed to increase membership in 2023-24 and are working hard to improve ticket sales.
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; due to rising costs this is becoming harder as our reserve only grows with investment income but we avoided having to use any of it in this year.
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	£ 50066.56 as of 25/06/2024
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 continue to have lower audiences than before the pandemic, apparently a wider problem across the classical music world.

## 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; this was relaunched 2 years ago and is beginning to grow.
Investment policy and objectives including any social investment policy adopted	Para 1.46	We have one investment with a fund tailored for charitable investments.

A description of the principal risks facing the charity	Para 1.46	With outgoings continuing to rise and audiences still low we are having to work hard to maintain our reserves.
Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document ( <a href="#">trust deed</a> , <a href="#">royal charter</a> )	Para 1.25	Written constitution dated 30 <sup>th</sup> January 2018
How is the charity constituted? (e.g <a href="#">unincorporated association</a> , 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	Mrs Sylvia Mary Lock	Chair		
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	Julie Ann Smith	Ticket Manager	From 21 <sup>st</sup> November 2023	
8	Carolyn Ann Keyzor	Soprano Representative		
9	Lesley Evelyn Chapman	Alto Representative	From 3rd October 2023	
10	Dr David Gweirydd Griffiths	Tenor Representative	From 3 <sup>rd</sup> October 2023	
11	Mr James Sweasey	Bass Representative		

## 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	
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### **Additional information (optional)**

#### **Names and addresses of advisers (Optional information)**

<b>Type of adviser</b>	<b>Name</b>	<b>Address</b>

#### **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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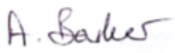

### **Other optional information**

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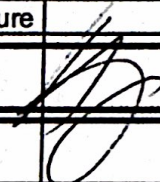
## Declarations

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	29/05/2025	

**Portsmouth Choral Union**  
**Assets and Liabilities**  
**1st August 2023 to 31st July 2024**

<b>Section B Statement of Assets and Liabilities</b>							
				<b>2024</b>		<b>2023</b>	
				<b>Cost</b>		<b>Cost</b>	
<b>B1 Cash Funds</b>							
CAF Cash Accounts (bank)				7,291.15		4,272.12	
CAF Gold Account (tour)				5,090.47		19,411.27	
Petty Cash				200.00		200.00	
<b>B2 Other Monetary Assets</b>							
Payments in Advance:		St Mary's		700.00		800.00	
<b>B3 Investment Assets</b>							
M & G Charibond				49,859.24		45,922.20	
<b>B4 Assets Retained for the</b>							
Parity's own use							
Keyboard (purchased 13/03/20)				-		678.58	
Compact audiohub (purchased 16/10/20)				-		311.86	
<b>B5 Liabilities</b>							
Accrual - PRS & Recordings				150.00		150.00	
Accrual - Bookkeeping				250.00		250.00	
Accrual - Storage						-	
Creditor - Members travel funds				5,072.54		26,577.03	
<b>Total of Assets less Liabilities</b>				<b>57,668.32</b>		<b>44,619.00</b>	
<b>Signatures</b>							
(Signed by one or two trustees on behalf of all the trustees)							
Signature		Print Name		Approval Date			
		DR ANDREA HEGDOW		30/5/24			

**Portsmouth Choral Union**  
**Receipts and payments**  
**From 1st August 2023 to 31st July 2024**

Section A Receipts and Payments							
				2023/2024			2022/2023
<b>A1 Receipts</b>							
Subscriptions				22,875.54			17,875.50
Sub donations				452.99			280.00
Donations and Sponsorship				2,882.27			530.20
Gift Aid				4,177.48			544.20
Fund Raising				0.00			975.67
Merchandise Sales				1.48			16.44
100 Club				430.00			260.00
E-Funding				325.04			571.01
Portsmouth Lottery				621.50			583.50
Income from Recordings				24.56			83.74
Income from Programmes				1,131.54			975.17
Income from Music Library				917.16			465.36
Income from Friends Subscriptions				483.58			179.68
Sundry				474.46			199.51
Interest from Investments/Savings				4,881.74			149.35
Bank Interest				0.00			0.00
					39,679.34		23,689.33
<b>A2 Asset and Investment Sales</b>							
<b>A3 Payments</b>							
Professional Fees				13,008.00			11,710.00
Donations				0.00			0.00
Hall Hire				2,460.10			2,100.73
Storage of Staging				1,500.00			1,500.00
Publicity				1,051.53			1,085.64
Sundries				1,132.68			1,331.25
Insurance				675.00			634.00
Red scarves				0.00			0.00
Subscriptions							0.00
Bank Charges				121.50			60.00
PUS Charges				0.00			85.45
Loss from Investments/Savings							2,384.13
Admin and Stationery				273.20			47.96
Internal fundraising							466.40
Bookkeeping / Accountancy				0.00			250.00
Deficit from Recordings							0.00
Deficit from Programmes				0.00			0.00
Deficit from Tour Refunds				0.00			
Deficit from Concerts				6,408.01			11,368.13
					26,630.02		33,003.69
<b>A4 Asset and Investment Purchases</b>							
Net of Receipts/Payments					13,049.32		-9,314.36
Balance B/Fwd from Previous Year					44,619.00		53,933.36
Fund Balance Carried forward					57,668.32		44,619.00



# 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

Charity Name

PORTSMOUTH CHORAL UNION

On accounts for the year  
ended

31<sup>st</sup> July 2024

Charity no  
(if any)

266974

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/07/2024

Responsibilities and  
basis of report

As the charity trustees of the Trust, 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 the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent  
examiner's statement

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

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn 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:

Przybycin

Date:

23/9/24

Name:

JOANNE PRZYBYCIN

Relevant professional  
qualification(s) or body  
(if any):

F.C.A  
ICAEW

Address:

18 PETERS ROAD

LOCKS HEATH

SOUTHAMPTON, SO31 6EQ