

# **York Philharmonic Male Voice Choir**

**Charity number 529713**

## **Financial statements for the year ended**

**31st August 2024**

# **outsourc**

Charity accounts preparation & independent  
examination service



# York *philharmonic* Male Voice Choir

Registered Charity No. 529713

## Trustees' Annual Report

For the Year 01 September 2023 to 31 August 2024

# TRUSTEES' ANNUAL REPORT

FOR THE YEAR 1<sup>st</sup> SEPTEMBER 2023 to 31<sup>st</sup> AUGUST 2024

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## LEGAL AND ADMINISTRATIVE INFORMATION

### STATUS

The York Philharmonic Male Voice Choir (The Fletcher Memorial Choir) is an association governed by our Constitution, dated 15 July 2020, and Rules dated 7 December 2020.

The Choir was first registered with the Charity Commission as a charity in 1972, registration number 529713.

The Choir does not have a registered office. All official correspondence for the period was to be directed to the Choir Secretary, Mr JD Thomson, by email at [yorkphilchoir@gmail.com](mailto:yorkphilchoir@gmail.com) or by post at 42 Rowntree Wharf, Navigation Road, York, YO1 9XA. Any current correspondence should be addressed to the address shown on the Choir's Charity Commission entry.

This Trustee Annual Report covers the 12 months 1<sup>st</sup> September 2023 to 31<sup>st</sup> August 2024. As the turnover of the choir is less than £250k the annual accounts will be presented on a receipts and payments basis. As turnover for the year is over £25k, a Trustees Annual Report (TAR) has been prepared and will be registered with the Charity Commission. In accordance with Charity Commission rules an electronic Annual Return will be made every year and reference can be made to the Financial Statement that is a separate document to this report.

### GOVERNING OFFICERS

The Choir is governed by the seven Trustees of the Choir who are elected annually by the membership at the Annual General Meeting (AGM) usually held in the spring/summer period. There were no changes in Trustees during the year between AGMs. Ex-officio officers are also appointed at the AGM.

	AGM Elected	
Role	22/07/24	12/06/23
President	Mrs J Waggott	Mrs J Waggott
Chair	Mr M Wash	Mr M Wash
Secretary	Mr D Thomson	Mr D Thomson
Treasurer	Mr M Clarke	Mr S Poole
Membership Representative	Mr A Houghton	Mr A Houghton
Membership Representative	Mr S Poole	Mr M Parrott
Membership Representative	Mr R Askew	
Membership Representative	Mr D Lampitt	

*(At the June 2023 AGM it was agreed that the Rules would be changed to increase the number of Membership Trustees from 2 up to a maximum of 4 and to allow 15 months between AGMs.)*

### INDEPENDENT EXAMINER

Karen Wood ACMA, CGMA Outsource Accounting Services & Independent Examinations, Hiscox Building, Peasholme Green, York, YO1 7PR.

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## LEGAL ADVISERS

The Choir has not appointed a legal adviser.

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## INSURANCE ADVISERS

The Choir has not appointed an insurance adviser and is insured by a policy arranged through the National Association of Choirs (to which the YPMVC is affiliated) by Marsh Commercial, Partnership House, Layerthorpe Road, Priory Park East, Hull, HU4 7DY. The policy is underwritten by Ansvar Insurance.

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## PROPERTY AND CUSTODIAN TRUSTEES

The Choir owns no interests in land or property and holds no assets or funds as custodian trustees on behalf of others.

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## BANKERS

Unity Trust Bank plc, Nine Brindley Place, Birmingham B1 2HB (2 accounts; 1 current, 1 savings)  
National Savings and Investments, Glasgow G58 1SB (1 investment account)

# STRUCTURE, GOVERNANCE AND MANAGEMENT

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## MEMBERSHIP

Voting membership of the Choir is open to anyone over the age of 18, and at 31<sup>st</sup> August 2024 there were 62 voting members up from 60 in 22/23. There are also 8 honorary life members who have no voting rights.

There are regularly between 50 and 55 members at each rehearsal evening and there's never a shortage to assemble sufficient singers for our performances. We are nevertheless always on the lookout for new members. Weekly sectional rehearsals were led by our AMD and around 20 regularly retire for a post rehearsal social drink and informal sing at The Snickleways pub.

Social activities this year included a golf day/dinner/auction; an informal music night where members get to practice solos and small group songs; and the Chair's Pre-Christmas 'bash' held once again at York Golf Club in October. There was also a social evening arranged by our President which also served as a briefing for those about to depart to the Cork International Choral Festival, in Ireland.

The Choir is also supported by The Phillies, an independent group that consists of member's wives and partners that as well as organising their own social events, also arrange and serve refreshments and organise raffles at our own concerts, fund raising events, and soirees.

The Choir has 25 paid up Friends who benefit from a regular newsletter, prize draw, and a free ticket to one of our Christmas Traditions concerts.

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## ORGANISATION

In addition to the seven trustees, the Choir's Management Committee includes the Choir's Musical Director (MD), Berenice Lewis, *ex officio* who this year clocked up 24 years as MD, together with a representative from each of the four sections of the Choir elected at the AGM each year. For 2023/24 these representatives were re-elected; Mr S Cox (1<sup>st</sup> tenor); Mr R Gott (2<sup>nd</sup> tenor); Mr P Newman (baritone) and Mr M Ellerker (bass). These committee members assist the Trustees in governing the Choir but in this capacity do not have voting rights at committee meetings. The Management Committee met on 4 occasions during the year.

Various activities are entrusted to working groups set up by the Trustees in April 2009 under the Choir's Rules. Currently there are four groups; Musical Development Group (MDG) (responsible for repertoire, rehearsals, music quality, and training of members); Concerts Group (responsible for all aspects of performances not requiring overnight accommodation); Tour Group (responsible for those events requiring overnight accommodation); and Media Group (aimed at promoting the Choir's activities and bringing them to the attention of a wider audience). The Uniforms Group established to consider the purchase of a new uniform continued through 23/24, placing an order for new uniforms in the summer of 2023 that were delivered from October 2023. These groups meet as and when required and attend Management Committee meetings as and when required. The Trustees have an open invitation also to meetings of the MDG with the Chair being a regular attendee.

Martin Sleeman continued his role as welfare officer and David Lampitt continued as the lead for the media Group. Two new Member Trustees were appointed, Rob Askew and David Lampitt. Adrian Houghton continued in his role as Vice-Chair.

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## RELATED ORGANISATIONS

The Choir is a member of the National Association of Choirs (NAC), a national body formed by choirs to give a collective voice, representation and to provide a wide support and advice function. The NAC is itself a charity, registration number 1014630.

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## INTERNAL CONTROLS AND RISK MANAGEMENT

The Trustees are responsible for the Choir's internal controls and for monitoring their effectiveness. No material weaknesses have been identified.

The Trustees regularly review the risks to the charity and have established systems and procedures to mitigate any risks identified and implemented procedures designed to minimise any potential impact on the charity should those risks materialise.

During the current cost of living crisis, the greatest risk to the Choir during this reporting period remained the choir's financial and members' health.

The Trustees have identified that financial sustainability remains a risk for the charity, especially following the replacement of our performance uniforms in late 2023 and the additional expenditure likely to be expended as we celebrate our 100<sup>th</sup> anniversary in 2025. Further Sponsorship and Donations have been secured for our Centenary year and other options are being considered for increasing revenue for day-to-day operations. Other key risks include damage to the Choir's reputation, not protecting the health and welfare of its members, and the failure to maintain a strong membership base. The latter is a continuing discussion at management meetings and is not unique to

this choir. During 23/24 we increased our social media presence with more regular posts about forthcoming concerts, the benefits of singing, and how to become involved with the choir. A key element in managing financial risk is to annually review the Choir's reserves. The Trustees conducted a review of their reserves policy in 2023 and agreed that the policy should remain un-changed and this was recorded at the AGM.

Our rehearsal venue began to undertake major development work which has reduced our storage space and so we sourced an alternative location within the city to store our large collection of archived scores, i.e. those not in our current repertoire.

Risks to our musical team were considered and it was agreed that succession planning should commence to secure long term musical direction that would provide stability and flexibility going into, and beyond, our Centenary year.

The choir has 3 nominated first aiders. First aid provision is to be reviewed 24/25. The Health & Safety Policy was reviewed during the 23/24 choir year.

## TRUSTEES' ANNUAL REPORT

The Trustees' Annual Report, together with the financial statements of the charity for the year ending 31<sup>st</sup> August 2024, have been prepared in accordance with the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard 102. The financial statement has been subjected to an independent examination by Outsource Accounting Services.

### OBJECTIVES AND AIMS

#### *Our objectives*

The charitable objectives of York Philharmonic Male Voice Choir are 'the study and practice of choral music to foster public knowledge and appreciation of such music by means of public performance'.

#### *Our aims*

The Choir seeks to achieve these objectives by giving public performances in various musical styles at a variety of venues (often in support of other charitable organisations) and by offering opportunities for male singers to develop and practise their skills in rehearsal and performance.

### ACTIVITIES AND ACHIEVEMENTS

#### *How our activities deliver public benefit*

The Choir rehearses weekly to enable the study of choral music and performs in public in different venues throughout the year in pursuance of our charitable aims. The Trustees consider that the Choir's activities, summarised below, provide public benefit both to those who join the Choir to sing, those who support us, and to the wider community who attend our performances.

#### *How we achieve our objectives*

We normally achieve our objectives through encouraging prospective members to attend rehearsals and learn about and practice choral singing. Most prospective members become full members and are expected to improve their singing skills and, having reached an acceptable standard (assessed by

means of a 'voice assessment'), perform in Choir concerts. We also achieve our objectives by giving public performances in a variety of venues throughout our local area and, on occasion, more widely nationally and internationally.

Income from travellers for the 2024 Cork Tour and ring-fenced income for Centenary Sponsorship are the principal reason for turnover this year being over £25,000.

In October 2023 The Fletcher Memorial Trophy was presented to Steve and Christine Boothman for their long and dedicated service to the choir; Steve as Treasurer of over 10 years and Christine for all of her work supporting the choir as a wife and 'Phillie'.

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### *New members*

We continue to see prospective members come along to rehearsals, and in 23/24, 7 new members joined the choir. Unfortunately, 5 members left the choir.

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### *Concerts*

During the year we performed at venues in York, Poppleton, Haxby, Easingwold (with Jubilate Ladies Choir), Dunnington, Starbeck, and Whitby. In addition to making direct donations to charity of over £1,400, concerts at Wheldrake, and St Columba's Church in York, were specifically for our three supported charities, where we perform free of charge, resulting in each charity raising significant valuable funds. At a further concert at St Columba's we were joined by the renowned male voices of the CorBach acapella group.

Once again, we had a packed schedule of Christmas events which generates the majority of our annual concert income and these included our 4-night run of Christmas Traditions, The Bar Convent, 2 nights at Holy Trinity in Goodramgate, York Station, and Fulford and Malton Golf Clubs. A smaller group also contributed to an annual memorial service at York City Church for those who have lost family and friends over the year.

We once again took part in the York Community Choir Festival at the Joseph Rowntree Theatre in February and which was the first concert in our new uniforms. Our own annual summer concert in July was another great success at our 'home', York City Church, also known as The Citadel.

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### *Competitions and Festivals*

Each year the Choir participates in at least one choral festival or competition. Once again, the Choir competed in the Eskdale Festival of the Arts in Whitby in April 2024, winning two out of three of the classes entered, and a second place.

Following the Covid enforced cancellation of our planned 2020 tour to Munster and Lochem, our application to the Cork International Choral Festival was successful, and we enjoyed 5 days representing the UK as non-competitive participants in May 2024. The party consisted of 57 members including 19 partners/guests who enjoyed socialising and singing in many wonderful venues, including Cork City Hall, St Fin Barre's Cathedral, the Goldie Chapel, the Cathedral of St Mary & St Anne, and other venues in and around Cork, and St Colman's Cathedral and sea front bandstand in Cobh, with audiences ranging from 20 in the smaller community venues up to around 400 in the City Hall. The party enjoyed evening concerts, visits to the Titanic Museum, Blarney Castle, and Jamieson's Brewery. The City of Cork was a wonderful host, and we also enjoyed local meals and informal sings in restaurants and pubs, culminating in a ceilidh and final sing in the atrium of the Clayton Hotel. On return this was considered to be one of the best tours in the choirs' recent history.

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### *Community performances*

It is clear to see from the Concerts section above that most of our performances are in the community and often for the community. As well as facilitating the enjoyment and appreciation of choral music the Choir helps raise funds for a wide variety of charities and community-based organisations including churches where we sing by invitation. A number of these are free of fees or performed at reduced fees to enable the financial proceeds to benefit other organisations and charities. These community events also open the Choir to new audiences and occasionally will attract new members.

Throughout 2023/24 we continued to support three local charities: Shine 21, Menfulness, and the North Yorkshire Music Therapy Centre. In addition to holding 2 concerts specifically for them, we once again donated a proportion of our Christmas concert earnings equally between them. We will be raising further funds for these charities during our Centenary year, 2025.

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## **FINANCIAL REVIEW**

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### *Reserves Policy*

The Trustees have agreed that the Choir's free reserves (excluding designated or restricted funds), should be set at a level that would fund one year's normal operating costs excluding depreciation and any extra-ordinary items. At the end of August 2024 that policy would indicate a required cash level of reserves of around £14k.

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### *Investment Policy*

The Trustees hold the Choir's reserves between National Savings and Unity Trust Bank which is a member of the Financial Services Compensation Scheme and at a level that is no greater than that guaranteed by the scheme. The Trustees aim to take little or no risk to loss of capital value and any investments will only be made where they can be readily redeemed in cash. As forecast, and following the purchase of our new uniforms, the choir currently holds around two year's reserves, down from just over three years' worth of reserves in August 2023. However, this remains within the choirs reserves policy limits.

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### *Financial Performance 2022/23*

The choir is using 'receipts and payments' accounts. As stated in the Financial Statement there were no funds materially in deficit at the 31 August 2024. The Choir this year had a significant deficit of income over expenditure of £24,218. due principally to the planned purchase of new performance uniforms. This includes restricted funds of £6,200 sponsorship and donations for our centenary celebrations. There is also a liability of £350 outstanding for financial audit. On 31 August 2024 total choir funds stand at £28,519, down from £52,737 at 31 August 2023.

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### *Economic challenges*

The Choir came out of the pandemic in a good financial position where the total financial assets at yearend have been stable for the last four years or so. We generally continue to raise sufficient income to fund our annual operational expenditure and must take care to ensure we recruit new members to sustain the Choir and perform sufficient income earning concerts.

The most significant future initiative that will have a major draw on our current reserves is the celebration of our centenary which is set out in more detail in 'plans for the future' below.

In addition to Members, Friends, 200 Club (our licensed lottery), ad-hoc donations and concert fee income (including ticket sales, raffles, and refreshments), In 23/24 two fund raising events were held at York's St. Crux, on 2<sup>nd</sup> September 2023 (raising £1.3k) and 20<sup>th</sup> July 2024. Net profit from our 2023 summer concert was around £1.4k (£1.4k in 2022) and 2023 Christmas Traditions around £3.6 (£3.1k in 2022).

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## **PLANS FOR THE FUTURE**

Planning for our centenary year continues and the York Barbican has been secured in September 2025 for a special concert that will include singing with choirs with whom we have performed over the years. We'll be welcoming representatives from our Choir friends from Munster and Lochem, together with other special guests who have supported the choir over the years. A celebration dinner is also being planned, and a new book is being written about the choir's rich history with lots of new information that has recently come to light. we continue to review the possibility of special activities to attract younger men. These remain at an early stage and will also require funds for which, in addition to using Choir savings, we continued to seek further donations and sponsorship from external parties.

A refresh of our website will take place early in 24/25 to give a more modern feel and improved information about what the choir can offer younger members. It will also be reconfigured to handle concert ticketing as the platform we currently use will be closing at the end of December 2024.

It is also likely that a tour will be arranged to take place during late 2026, or during 2027.

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## **TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS**

Law applicable to charities in England and Wales requires the Trustees to prepare financial statements for each financial year, which give a true and fair view of the charity's financial activities during the year and of its financial position at the end of the year. In preparing financial statements giving a true and fair view, the Trustees are required to:

- select suitable accounting policies and then apply them consistently.
- observe the methods and principles of the Charities' Statement of Recommended Practice (SORP).
- make judgements and estimates that are reasonable and prudent.
- state whether applicable accounting standards have been followed, subject to any departures disclosed and explained in the financial statements.
- prepare the financial statements on a 'going concern' basis unless it is inappropriate to presume the charity will continue in operation.

The Trustees are responsible for keeping accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with The Charities Act 2011. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

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## TRUSTEES' APPROVAL OF THE TAR AND ACCOUNTS

The Trustees declare that they have approved the Trustees Annual Report and Accounts

Signature:

A handwritten signature in purple ink, appearing to be 'MW', with a long horizontal flourish extending to the right.

Name: Mike Wash (Chair)

Dated: 20.3.25

# **York Philharmonic Male Voice Choir**

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<b>Independent examiner's report to the trustees</b>
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I report on the accounts of: **York Philharmonic Male Voice Choir**  
for the year ended: **31st August 2024** which are set out on pages 2 to 4.

**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 Charity'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**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
- 2 the accounts do not accord with those records

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.


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**Date:**

**Karen Wood ACMA**

Outsource independent examination service

The Hiscox Building

Peaseholme Green

York YO1 7PR

**York Philharmonic Male Voice Choir**  
Charity number 529713

**Receipts & Payments Accounts for the year ended:**

**31st August 2024**

	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>2024 Total funds</b>	<b>2023 Total funds</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Receipts</b>				
Merchandise sales	2,021	-	2,021	-
Members subscriptions	7,617		7,617	5,769
Friends subscriptions	640		640	840
200 club subscriptions	1,161		1,161	1,230
Tour income	19,939		19,939	4,466
Other performances	2,916		2,916	1,941
Concert income	12,846		12,846	12,496
Fundraising & donations	2,636	2,550	5,186	4,328
Gift aid reclaimed	1,694		1,694	1,294
Bank interest	644		644	339
<b>Total receipts</b>	<b>52,114</b>	<b>2,550</b>	<b>54,664</b>	<b>32,703</b>
<b>Payments</b>				
Tour costs	24,225	236	24,461	3,348
Music Scores	579	-	579	949
Marketing , advertising & website	889	-	889	539
Musical direction & expenses	6,119	-	6,119	6,155
Hire of hall for rehearsals & storage	5,456	-	5,456	5,155
Accompanist	1,140	-	1,140	1,460
200 club prizes	608	-	608	713
Accountancy fees	330	-	330	300
Friends prizes/gifts/soiree	1,315	-	1,315	775
Bank charges	376	-	376	319
Office, postage & stationery	131	-	131	153
Insurance	207	-	207	198
Fundraising costs	408	-	408	155
Donations to other organisations	1,414	-	1,414	900
Concert & uniform expenses	34,080	-	34,080	4,694
Minor equip & other sundry costs	1,369	-	1,369	195
<b>Total payments</b>	<b>78,646</b>	<b>236</b>	<b>78,882</b>	<b>26,008</b>
<b>Net of receipts/(payments)</b>	<b>(26,532)</b>	<b>2,314</b>	<b>(24,218)</b>	<b>6,695</b>
<b>Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Balance brought forward</b>	<b>48,851</b>	<b>3,886</b>	<b>52,737</b>	<b>46,042</b>
<b>Balance carried forward</b>	<b>22,319</b>	<b>6,200</b>	<b>28,519</b>	<b>52,737</b>

**York Philharmonic Male Voice Choir**  
Charity number 529713

**Statement of Assets and Liabilities at:**

**31st August 2024**

			<b>2024</b>	<b>2023</b>
	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>Total funds</b>	<b>Total funds</b>
<b>Assets</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b>Cash at bank and in hand</b>				
Current bank account	1,421	-	1,421	14,284
Savings bank account	3,970	6,200	10,170	21,655
Investment savings account	16,814	-	16,814	16,684
Cash in hand for floats	114	-	114	114
	<b>22,319</b>	<b>6,200</b>	<b>28,519</b>	<b>52,737</b>

			<b>2024</b>	<b>2023</b>
	<b>Unrestricted funds</b>	<b>Restricted funds</b>	<b>Total funds</b>	<b>Total funds</b>
<b>Liabilities</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Independent review fee	330	-	330	300
	<b>330</b>	<b>-</b>	<b>330</b>	<b>300</b>

York Philharmonic Male Voice Choir  
Charity number 529713

Notes to the accounts for the year ended:

31st August 2024

1. Basis of Accounts

The trustees have taken advantage of section 144 (2) of the Charities Act 2011 and prepared the accounts on a receipts and payments basis.

2. Restricted income funds

Fund name	Purpose
Young/impecunious members assistance	To support young /impecunious members to join a choir tour
Choir centenary events	To fund choir centenary events during the calendar year 2025

	Balance b/fwd £	Incoming resources £	Resources expended £	Trf between funds	Balance c/fwd £
Young/impecunious members assistance	236	-	236	-	-
Choir centenary events	3,650	2,550	-	-	6,200
	<u>3,886</u>	<u>2,550</u>	<u>236</u>	<u>-</u>	<u>6,200</u>

Approval of accounts for the year ended:

31st August 2024

The report and accounts were approved at a meeting of the trustees held on:

20/03/2025

Date

Signed for and on behalf of the trustees:



Signature

STEPHEN POOLE

Name



Signature

20/3/2025 M.G. WASH

Name