

Sheffield Philharmonic Chorus

TRUSTEE ANNUAL REPORT for the period 1st August 2022 to 31st July 2023

Sheffield Philharmonic Chorus – Who we are and what we do

Sheffield Philharmonic Chorus (SPC or the Chorus) is a local music making charity which presents choral concerts in Sheffield and beyond. It is a member of Making Music, a national charity which supports music-making individuals and organisations, and Classical Sheffield, a local umbrella organisation for classical music-making in Sheffield.

Our Constitution sets out our charitable objects *'to advance the education of the general public in choral music by the regular performance of such music from the widest possible repertoire and such means as the Committee think fit'*.

Positive reviews and audience feedback confirm that we present high quality and innovative performances that are pleasurable cultural experiences for both audience and participants, even when we select difficult works that extend everyone's musical knowledge. Concerts are open to everyone, with accessible venues and concession prices for young people and those in receipt of benefits. Chorus members greatly value the opportunity to engage in creative, enjoyable and fulfilling performances and recordings that help them to develop their vocal technique and musical repertoire. Singing membership is open to anyone who can sing to the required standard, and we do not exclude people on any other basis than their ability to sing. Registered blind people are valued members of the Chorus, and we have ensured that members with limited mobility are able to sing from the rather steep City Hall choir risers by regularly using a stair-climber, which we obtained using Lottery funding. We offer special arrangements to those unable to pay the full subscription fee.

As can be seen from the Chair's Report, we presented a full season of concerts and are confident that our activities meet the public benefit requirements set out in section 4 of the Charities Act 2006.

SPC was an unincorporated charity (registration number 518073) until 17 October 2017 when it was registered as a Charitable Incorporated Organisation (CIO) registration number 1175185. The process of transferring our assets to the CIO proved to be difficult and time-consuming, and the unincorporated charity was eventually wound up in accordance with the procedure required by the Charity Commission by the end of August 2022.

Our Constitution was agreed by the members at the Annual General Meeting (AGM) held on 15 November 2016. It is based on the Charity Commission's 'Association' model and can only be amended at a meeting of all the members, which last happened in November 2022.

Our Rules are not part of the formal Constitution but form an Appendix to it. The Rules include arrangements for appointing the Music Director and Accompanist and for auditions and re-auditions, minimum attendance requirements, concert procedure, and the Chorus dress code. The Rules were last updated in May 2023.

Our Trustees plan what we do, ensuring our activities benefit the public by meeting our charitable objects. Anyone can stand as a Trustee if they are eligible under Charity Commission requirements and have been a member of the Chorus for at least a year. Trustees are normally elected by the members at the AGM but may also be appointed by the existing Trustees.

The Trustees form a Chorus Committee, which meets approximately six times a year to plan and manage Chorus affairs. A smaller Event Planning Group organizes concerts. Trustees receive a Trustee Pack which includes guidance documents produced by the Charities Commission to help them understand and meet their responsibilities.

The Trustees appointed in November 2022 were:

Chair: Jo Briddock

Administrator: Anne Adams

Finance Officer: Jane Parkin

Membership Officer: Marianne Grayson

Librarian: Alan & Rosemary Anderson **Rehearsals and Concerts Manager:** Jim Monach
Minutes Secretary: Kathy Towers **New Members' Officer:** Sally Turnbull
Social Events Officer: Helen Kirk **Transport Officer:** Paul Duffield
Education and Outreach Officer: Georgina Hulse
Members' Representatives: Christine Pennington, Jenny Swann, Patrick Callaghan

Our Professionals The Trustees are responsible for appointing the Music Director, Accompanist and Voice Coach, whose expertise and commitment play a huge part in enabling the Chorus to meet its charitable objectives. In addition, from time to time the general membership elects a President in recognition of her/his special contribution to the work of the Chorus. During 2022-23 our professionals were:

President: Rachel Copley **Music Director:** Darius Battiwalla
Accompanist: Rachel Fright **Voice Coach:** Margaret McDonald

Our helpers Both Trustees and other members helped the Chorus meet its objectives in various roles:

Voice Reps: Katrina Hulse, Jacqui Amos, Pat Hall, Nerissa Kisdon, Kate Reece, Jim Monach, Richard Salt, Allan Lacey.

Website: Anne Adams, Matthew Morgan, Bill Best

Independent Examiner: Richard Pike

Making Music Representative: Jim Monach

YouTube channel: Matthew Morgan

The Trustees are most grateful for the work of these generous and committed individuals.

The 2022-23 season – Chair's report

The 2022/23 season was wonderfully varied. It included some of the pillars of the choral repertoire alongside brand new music. And we are delighted to have collaborated with some musicians that we have not worked with before.

In November we sang a range of English music by Parry, Delius, Coleridge-Taylor, Finzi and Dove at our self-promoted concert in St Marks Broomhill. It was wonderful to hear the organ in full force for Parry's 'God has gone up' which made a great contrast to some of the other unaccompanied music including Parry's Songs of Farewell.

December saw us singing carols with Georgina Hulse conducting, at Meadowhall for Roundabout, a local homeless charity, the Millennium Galleries for Friends of Sheffield Museums, and in Sheffield Cathedral for the St Lukes Carol Concert with our President, Rachel Copley, at the helm. This is always a very special occasion of remembrance, which we are proud to support. The annual City Hall Christmas concert is the start of Christmas for many, and it is always a joy for us to join forces with the incomparable Black Dyke Band. We look forward to more collaboration with them next season, including a recording of Christmas music.

In February we performed the UK premier of Caroline Shaw's *Music in Common Time* with Manchester Camerata in Sheffield City Hall. The piece makes use of unusual vocal effects and the Chorus had to get to grips with some new techniques which stretched and challenged us - in a good way!

We were delighted to join forces with Hallam Choral Society, Hallam Sinfonia and Sheffield Philharmonic Orchestra to perform Mahler Symphony No.2 in the finale concert of the Classical Sheffield Weekend in March. It was a spectacular end to the festival weekend.

This concert also saw another special venture come to fruition. The Chorus devised and organised a new young composer competition. The competition is called the Stella Jockel Young Composer Competition because it was made possible by a generous bequest from our late long-standing member Stella Jockel. The winners were announced at the concert and prizes were awarded, on stage, by the Lord Mayor. The winning entries were then performed by the Chorus. The competition was extremely successful, and we hope to run it again.

In June the Leeds Festival Chorus joined us in the City Hall to sing the magnificent Verdi *Requiem*. This performance had been subject to delays due to the pandemic, and we were delighted finally to be able to come together. The conductor, Sofi Jeannin, was given a wonderfully warm welcome. She is currently the Chief Conductor of the BBC Singers, and the Chorus was pleased to add our many voices to the tidal wave of support for that amazingly accomplished group of singers.

I would like to thank the Trustees and the Committee for the huge amount of work that made this season possible. And we are very grateful, as always, to our music professionals Darius, Rachel and Maggie for their commitment and inspiration.

Joanne Briddock, Chair

Achievements and performance

The Aims of the Chorus are to '*advance the education of the general public in choral music by the regular performance of such music from the widest possible repertoire*', and the people who benefit are Chorus members, concert-goers in Sheffield and the surrounding area, and the wider listening public.

The 2022/2023 season met these aims, with five concerts in Sheffield performing a wide range of British, European and American music from the 19th to the 21st centuries. Living composers included the Pulitzer Prize-winning young American Caroline Shaw and British-born Jonathan Dove as well as two young people from Sheffield just starting out on their careers, the extremely successful result of our exploration of ways in which the Chorus might support local young musicians.

We collaborated with other music makers from Classical Sheffield for the spectacular finale to the Festival Weekend, sang with our friends from Leeds Festival Chorus, and were accompanied by organist Alex Woodrow, Manchester Camerata, the Halle and Black Dyke Band.

Engagement with the website improved again in 2022-23, with 44,512 visits (clicks on a page) compared to 31,493 last year, an average of 3,700 visits per month (2,600 last year), an increase of 41%. The visits were from 6,601 individuals (unique devices) compared to 5,820 last year, an average of 550 individual visitors per month (485 last year), which is a 13% increase. The larger % increase in visits is extremely encouraging as it means the individual visitor engagement has increased, from 5.4 to 6.7 (ratio of visits to unique devices)

The Finance Officer successfully transferred our funds from the old charity to the new Charitable Incorporated Organisation, completing a change that has taken far longer than expected. The new

online system continued to work well and provide benefits, including the automatic calculation of Gift Aid.

Achievements against targets set last year

Target	Outcome
Complete our conversion to a Charitable Incorporated Organisation by transferring the charity's assets to the new organisation.	Achieved, after a lengthy and time-consuming process, in August 2023
Grow our membership and strengthen the committee	Achieved; membership has grown, and five new Trustees were elected including a new Chair, bringing fresh ideas and enthusiasm to the committee. A Marketing and Publicity Officer was hired to strengthen marketing, especially of self-funded concerts.
Support young musicians in Sheffield and the wider area by launching a Young Composer Competition, funded by the generous legacy bequeathed to the Chorus by former member alto Stella Jockel, who died in 2020.	Achieved, with 14 submissions from which five were shortlisted and the winning compositions premiered before an audience of 1,400 in the City Hall as part of the finale for the Classical Sheffield Festival weekend in March 2023.
Investigate ways of streamlining the subscription fee payment process and develop a set of financial procedures.	Achieved. Financial procedures include a method of budgeting that separates concerts from fixed costs. More members pay by standing order or bank transfer, which is more efficient.
Consider setting out the longer term aims of the Chorus, including steps to achieve financial sustainability, into a formal plan.	Achieved; members will participate in the development of a set of strategic aims, at the AGM in November 2023

Plans and targets for the 2023-24 season

The 2023-24 season begins with a self-funded concert at St Mark's Church, Broomhill, when we will sing a number of French pieces including Durufle's *Requiem*, and world premieres of two more winning works from the Stella Jockel Young Composer Competition. We will record a Christmas CD with Black Dyke Band in November and present our annual carol concert with them at Sheffield City Hall in December. We plan to hold a Come and Sing event for the first time in many years, hopefully to attract new members. A concert featuring works by both Gustav Holst and his daughter Imogen heralds a welcome return to the Victoria Hall in March, with a mini tour of Mozart's *Requiem* in London, Sheffield and Edinburgh in June. We also plan a summer visit to France to sing with our friends in Perigueux, and our usual raft of elective events, with carols in various venues including the popular and moving carol service for St Luke's in the cathedral.

In terms of targets, we will continue our efforts to grow our membership with strength in each voice part. We hope to sing more of the often-neglected work of female composers, and to continue to support young composers. Following the success of the Stella Jockel Young Composer Competition, we will investigate the feasibility of launching a project to support young conductors. We aim to set

up a sub-group of trustees to plan concerts and other events enabling committee meetings to focus on governance, and to involve the whole Chorus in agreeing a set of ambitious strategic goals, underpinned by a formal plan that will take the Chorus forward, including steps to achieve financial sustainability. We will continue to seek ways to simplify our finances, to include the purchase a new card reader to facilitate cashless payments.

Financial review

The accounts presented here reflect all the financial activities from 1st August 2022 to 31st July 2023 inclusive. The accounts are shown in two tables reflecting the style of account reporting appropriate for a CIO. The Summary of Fund Movements 2022-23 lists where all the funds are held and shows totals of all the movements during the financial period to 31st July 2023. The statement of all the financial activities between 1st August 2022 and 31st July 2023 shows a comparison of the income and expenditure categories between this financial accounting period and the previous one and where funds are being held or used for restricted purposes.

Income/costs for events have been grouped together to give individual concert income/expenditure information. For income this includes sale and hire of music, ticket and programme sales etc. Event costs include Chorus Master and Accompanist attendance and concert fees, artistic costs, purchase and hire of music, printing and publicity etc. The Concerts Finance Summary shows the balance of income and expenditure for each of our concerts.

The same format has been used to develop a budget sheet for the current season and a predicted budget sheet across the next 3 seasons where information is known. Most amateur choirs make a loss on their concerts and this is the case for SPC.

Gift Aid

The amount shown as "Gift Aid received from HMRC" is the actual amount received in the year (relating to the previous year) while the amount shown as "Gift Aid tax income due" is the amount the accounting system estimates is due for the current year. Where members are able to gift-aid this provides a significant additional income stream and helps keep subscription rates down.

Risk Assessment

For each self-promoted concert the Committee produces a risk assessment document which, amongst other factors, covers financial aspects of risk. Appropriate actions are taken depending on circumstances including taking out additional insurance cover when necessary.

Reserves

SPC has a reserves policy which recognises significant financial risks and aims to hold sufficient funding to cover all activities in the current season and any firm commitments in the following season. The current level of funding meets this reserves policy. At current rates of income and expenditure we need and have a reserve of around £20,000.

Income

The principal funding sources are generally membership subscriptions, friends, supporters and donations and people's extreme generosity ensures we can fund self-promoted concerts, with many members deliberately paying much more than is required. Some new members have joined this year and subscriptions totaled over £22,000 during the year; it is important that we try to maintain our membership level both for the ability to perform demanding works and to bring in an appropriate level of funding. In line with our policy of inclusion, members can choose a payment method which suits them best though we encourage them to use internet bank transfer or standing order. There is a concessionary rate for students and those that cannot afford the full amount.

Expenditure

Principal regular items of expenditure during the financial year include paying for the services of the Music Director, Accompanist and Voice Coach. Their fees are reviewed by the Committee annually. The fee structures for the Music Director and the Accompanist include a retention element. The expenditure for room-hire includes the costs associated with rehearsals and auditions. Artistic costs for concerts can be significant with soloists for self-promoted concerts being chosen to meet the necessary artistic requirement and agreed budget availability. Such expenditure is added to the appropriate event costs. City Hall concerts provide a level of financial income to off-set artistic costs dependent on a ticket sales formula, but year on year we seem to have to pay a greater contribution to each concert. The Verdi *Requiem* concert was particularly costly as the SPC was required to pay £7,000 for soloists though the net cost of this event was reduced to some extent by the income from the City Hall. This year we used some of the general bequest from Stella Jockel to fund a young composer competition; the two winning entries were performed as part of the closing concert for the Classical Sheffield week.

Subscription Rates

In view of the high level of inflation over the first 7 months of 2023, the Committee recommends that the subscriptions for the 2023-24 year be set at £156 (full rate) or £42. (reduced rate). This recognises the difficult financial situation that many Chorus members may find themselves in and represents an increase that is considerably less than the rate of inflation.

Thanks are due again to Richard Pike for providing the independent examiner function in a thorough and professional manner. Finance Officer Jane Parkin is grateful to Committee members and all the membership for the support she has received during the year. It is much appreciated.

Jane Parkin, Finance Officer

CHARITY 1175185		01/08/2022 to 31/07/2023		
BALANCE SHEET: SUMMARY OF FUND MOVEMENTS 2022-23				
	Balances brought forward	Income	Expenditure	Balances carried forward
Fund Accounts	£	£	£	£
Co-operative Bank Account	30,669.83	41,007.37	-41,266.41	30,410.79
COIF Deposit Account	71,000.00			71,000.00
Balances Total	101,669.83	41,007.37	-41,266.41	101,410.79
Gift Aid due	4,986.98			4,811.83
Total Funds	106,656.81			106,222.62

SPC CONCERT FINANCE SUMMARY 2022/2023 as at 31 July 2023							
	St Marks Nov 2022	Christmas 2022	Shaw Feb 2023	Mahler 2 Mar 2023	Y Composer Mar 2023	Verdi Jun 2023	TOTALS
EXPENDITURE	£	£	£	£	£	£	£
Orchestra							0.00
Instrumentalists	350.00						350.00
Conductor	500.00						500.00
Soloists						7000.00	7000.00
Chorus Master			304.50			304.00	608.50
Accompanist			101.00				101.00
Venue hire	450.00						450.00
Purchase/hire music	652.24	127.50				252.85	1032.59
Publicity	336.00						336.00
Printing		97.80		13.02	343.00		453.82
Prizes					3816.80		3816.80
Fees					1420.00		1420.00
Social	24.28						24.28
Totals	2312.52	225.30	405.50	13.02	5579.80	7556.85	16092.99
INCOME							
Ticket sales	2825.00			699.69		3175.61	6700.30
Programmes							0.00
Sale/hire music	677.60	430.10		403.80		96.00	1607.50
Social	86.18						86.18
Donations							0.00
Totals	3588.78	430.10	0.00	1103.49	0.00	3271.61	8393.98
Income - Expenditure	1,276.26	204.80	-405.50	1,090.47	-5,579.80	-4,285.24	-7,699.01

CHARITY 1175185 STATEMENT OF FINANCIAL ACTIVITIES 2022-23 01/08/2022 to 31/07/2023				
	Unrestricted funds (£)	Restricted funds (£)	Total funds (£)	Previous year funds (£)
INCOME FROM				
Voluntary income				
Members subscriptions	22,162.22		22,162.22	20,629.68
Friends and supporters	550.00		550.00	585.00
Gift Aid received from HMRC	5,076.57		5,076.57	2,690.57
Donations	306.00		306.00	38,470.00
Gift and social donations	1,083.40		1,083.40	2,039.00
Fundraising income				
Folders and scarves	15.00		15.00	310.00
Book sales etc	85.00		85.00	0.00
CD sales	405.00		405.00	276.45
Amazon sales	44.32		44.32	31.22
Easyfundraising income	21.27		21.27	64.89
Investment income				
Investment and interest	2,049.86		2,049.86	55.48
Charitable activities income				
Sale and hire of music				1,372.40
Event inc - Faure Jan22	397.50		397.50	
Event inc - Belshazzar Jun22	389.25		389.25	
Event inc – Vespers Mar22				3,295.00
Event inc – Messiah Apr 22	28.00		28.00	10,987.00
Event inc – St Marks Nov22	3,588.78		3,588.78	
Event inc – Christmas 22	430.10		430.10	
Event inc – Mahler Mar23	1,103.49		1,103.49	
Event inc – Verdi Jun 23	3,271.61		3,271.61	
Other income				62.79
Totals	41,007.37	0.00	41,007.37	80,869.48
Gift Aid tax income due	4,811.83		4,811.83	4,986.98

CHARITY 1175185 STATEMENT OF FINANCIAL ACTIVITIES 2022-23		01/08/2022 to 31/07/2023		
	Unrestricted funds (£)	Restricted funds (£)	Total funds (£)	Previous year funds (£)
EXPENDITURE ON				
Fundraising costs				
Folders and Scarves	0.00		0.00	918.00
CDs - D Battiwalla	0.00		0.00	30.00
Charitable Activities Costs				
Gifts and Social	1,154.85		1,154.85	1,417.50
Chorus Master	9,536.60		9,536.60	2,388.00
Accompanist	4,567.00		4,567.00	1,044.00
Voice Coach	2,184.00		2,184.00	2,004.00
Voice Training	120.00		120.00	0.00
Electives	170.00		170.00	0.00
Event costs – Messiah 2020	0.00		0.00	40.00
Event costs – St Marks Jul 21	0.00		0.00	335.00
Event costs – Shef Fest Sep21	0.00		0.00	180.00
Event costs – After hrs Nov21	0.00		0.00	3,147.25
Event costs – Christmas 2021	0.00		0.00	1,293.78
Event costs – FaureJan22	0.00		0.00	3,659.60
Event costs – VespersMar22	0.00		0.00	5,427.08
Event costs – Messiah Apr 22	0.00		0.00	21,650.13
Event costs – BelshazzarJun22	56.00		56.00	4,198.17
Event costs – St Marks Nov22	2,312.52		2,312.52	78.33
Event costs – Christmas 2022	225.30		225.30	0.00
Event costs - Shaw Feb23	405.50		405.50	0.00
Event costs – Mahler Mar23	13.02		13.02	0.00
Event costs - competition Mar23	5,579.80		5,579.80	0.00
Event costs – Verdi Jun 23	7,556.85		7,556.85	0.00
Event costs – St Marks Oct23	40.32		40.32	0.00
Classical Sheffield	180.00		180.00	150.00
Insurance & PRS fees	634.00		634.00	637.26
Room hire	4,651.25		4,651.25	525.00
Marketing Officer	160.00		160.00	0.00
Admin and IT costs	1,719.40		1,719.40	970.08
Governance costs				
Bank charges	0.00			75.49
Totals	41,266.41	0.00	41,266.41	50,168.67
Net income/(expenditure)	-259.04		-259.04	30,700.81

Independent Examiner's report

Please note that the Independent Examiner's duty is to report to Trustees; a copy of his report follows. Thanks are due to Richard Pike for providing the Independent Examiner function in a thorough and professional manner.

Independent Examiner's report to the trustees of Sheffield Philharmonic Chorus

I report to the trustees on my examination of the accounts of Sheffield Philharmonic Chorus ('the Trust') for the year ended 31 July 2023.

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').

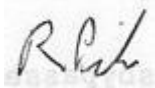
I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

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 which gives me cause to believe that in any material aspect:

accounting records were not kept in respect of the Trust as required by section 130 of the Act; or 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 order to enable a proper understanding of the accounts to be reached. Signed:



*Richard Pike 4 September 2023
195A Springvale Road, Sheffield S6 3NT*

Trustee Declaration

On behalf of the SPC trustees, we declare that we have approved this Annual Trustees' Report.

Signed by the Chair:	
Date:	18 October 2023
Signed by the Finance Officer:	
Date:	18 October 2023

APPENDIX: Membership Report

2022-23 was another improving year for the membership, as numbers increased slightly compared to last season, and concert and rehearsal attendance improved again. The only less bright part of the picture is the lack of increase in tenor numbers, with lower-than-average attendance in this section making this situation worse.

At the end of the 2022-23 season there were 151 singing members of the Chorus, up from 148 at the end of the previous season. There were an additional 7 people on Leave of Absence.

There were 8 resignations during the season: 3 for reasons of declining health, 3 because of work and other commitments, and 2 because they were leaving Sheffield.

The net gains were in the women's sections.

Membership	S	A	T	B	Total
2020-21	65	48	15	30	158
2021-22	55	49	14	30	148
2022-23	57	50	14	30	151

Concert attendance

We held 5 performances during the season. Member attendance at concerts averaged 113 (75%), another improvement on last season's 67%. The best attended was the Verdi Requiem concert, attended by 89% of singing members, and the least good was the Shaw, with 63%. Average attendance only went down in the tenor section, exacerbating the problem of their low numbers.

Average concert attendance (previous season in brackets)	S	A	T	B	Total
	41	39	9	23	113
	72% (66%)	78% (63%)	67% (71%)	78% (75%)	75% (67%)

Rehearsal attendance

Rehearsal attendance is also improving: the commitment message seems to be having an effect. The average attendance at rehearsals has gone up to 118 (range 99 to 139), 78% of the membership (last season 105, 71%). The Alto section had the highest attendance.

Average rehearsal attendance Soprano 76% (last season 68%) Alto 82% (last season 70%) Tenor 64% (last season 67%) Bass 80% (last season 79%) Total 118: 78% (last season 71%)

Average rehearsal attendance (previous season in brackets)	S	A	T	B	Total
	76% (68%)	82% (70%)	64% (67%)	80% (79%)	78% (71%)

Marianne Grayson, Membership Officer

New Members

This season there were 35 enquiries about joining the Chorus, all via email. Of these, 19 turned up to try a rehearsal, 15 auditioned and 8 passed their audition, comprising 4 altos, 3 sopranos and one bass. The comparatively lower than usual conversion rate and audition pass rate may be due to the success of our efforts to make our website and application process more accessible and welcoming for potential newcomers, such that we are attracting applicants who might have previously considered us out of reach.

Most visitors find us via an internet search when they move here, or by having a contact in the Chorus or having heard us at a concert.

It is good that potential members receive such a friendly welcome from the whole Chorus. The general comment, even if people don't pass, is that they find us a welcoming group and enjoy rehearsals, even if unfortunately, they don't pass. It is all good for our image and a positive experience is important in "spreading the word".

Season	A Whole- year enquiries	B Rehearsal try-outs	C Auditions	D New Members	Audition Pass rate	Conversion Rate (B to D)
2020-21*	* 11	6*	3*	*3	100%	50%
2021-22	63	35	30	22	73%	63%
2022-23	35	19	15	8	53%	42%

**figures affected by the Covid-19 pandemic*

Sally Turnbull, New Members Officer