

# Westbourne Orchestral Society: Annual Report for the year ending 28 February 2015

## Introduction

This report is designed to meet the current reporting requirements of the Charities Commission for small charities.

## Reference and administrative details, trustees and advisers

Charity name: Westbourne Orchestral Society (referred to as WOS for brevity below)

Charity registration number: 282074

Principal office: care of the Hon. Secretary or Chairperson (see below)

Trustees at the date of approval of this report:

Patrick Lee (Chairperson)

Debbie Stent (Hon. Secretary)

Heather Makiola (Hon. Treasurer)

Stella Galton (Librarian)

Rob Hanmore

Julia Davy

The above have been Trustees throughout the financial year.

## Structure, governance and management

WOS's governing document is its Constitution, the current version of which at the time of writing this report dates from 1 July 2012. WOS is an unincorporated association.

In accordance with the constitution, trustees are appointed each year by election at the Society's Annual General Meeting. Only Playing Members of WOS may vote, but non Playing Members or Honorary Members may stand for election to the Committee, after having confirmed (by signing a nomination form) that they wish to stand and having then been proposed and seconded by two other members. Members must be present in person to vote.

No formal training has normally been provided for trustees, with the exception of the Hon. Treasurer role, for which training has been provided at one or more handover meetings by the outgoing Treasurer to the incoming one, with the Chairperson in attendance to provide additional continuity.

Decisions are normally taken by the Committee, either at formal Committee meetings or by majority agreement by email. The Conductor is not a Trustee, but is responsible, subject to consultation with the Committee for major changes, for maintaining the quality of the musical output of the Society at a reasonable level. The Conductor is ultimately accountable to the Society via its Committee, as the appointment of the Conductor (and Deputy Conductor and Leader) are subject to annual review by the Committee, after consulting the orchestra (the Society's members).

## Financial Review

Policy on reserves:

In order to keep operating reserves that are prudent but not excessive, our aim is to hold reserves equivalent ideally to about one year's expenditure. Should adverse financial conditions occur, such a level of reserves should enable WOS to continue to fulfil its normal musical activities during several months while a plan of action is drawn up to restore balance to its finances.

Expenditure during recent years has varied between £6,000 and £11,000 so this would imply holding reserves at somewhere around the upper half of that level. Due to a significant legacy received in 2006, the assets at the end of the year amounted to just under £42,500.

The Trustees recognise the Charity Commission's requirement to put funds received to good use in furtherance of the charity's objects. Since the legacy was received in 2006, we have had a deliberate policy of reducing the level of reserves by using the legacy to further our aims. In particular, subscriptions and concert ticket prices have been kept significantly lower than they would otherwise have needed to be, to encourage both membership of the orchestra and audience attendance. We also hope that by keeping our ticket prices relatively low, audience members will be encouraged to give generously in our retiring collections for our supported charities. In addition, the legacy has enabled us to sponsor our successful youth and age 21+ concerto competitions.

Our aim is to reduce the level of reserves over the next 9 to 14 years towards our ideal level of one times expenditure, but in such a way that at the same time, the Society's finances then reach equilibrium (so that its activities are able to continue at the same level on a self-financing basis). We are conscious that in order to achieve this, we will need to both grow membership and audience sizes, and we are actively working towards these goals.

## Funds held as custodian trustee on behalf of others

No funds are held as custodian trustee on behalf of others.

## Public benefit statement

The Trustees confirm that they have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission in exercising their powers or duties.

## Objectives and activities

WOS's aims are set out in its constitution as follows:

To promote and help popularise classical music, by the presentation of concerts, and thereby providing education in the art and science of music.

To provide a means by which musicians of various grades of competence can enjoy making music together.

To form its members into a symphony orchestra to encourage musical appreciation and knowledge.

To raise funds for various charities and causes.

The main activities undertaken by WOS to further its charitable purposes for the public benefit are: organising rehearsals (including sectionals) to prepare the orchestra for concerts, performing in public concerts (at which retiring collections are often held to raise funds for chosen charities and net concert proceeds are shared with the host venue, usually a church), and organising and sponsoring concerto competitions to encourage soloists and to provide young and older musicians with the opportunity of performing with an orchestra.

## Achievements and performance

A brief summary of our achievements during the financial year in relation to our objects is as follows:

We have performed in 6 public concerts as follows:

*29 March 2014 at St Ambrose, Westbourne and 5 April 2014 at St Thomas', Bournemouth*

Beethoven: Egmont Overture

Mozart: Clarinet Concerto (soloist: Tim Spencer)

Tchaikovsky: Symphony No 2

These two concerts were in memory of 2 former members of the Orchestra, Jim Grant (former principal clarinet) and Olive Hall (violinist) who very sadly died in 2013 due to cancer, hence the retiring collection in aid of Cancer Research.

*12 July 2014 at St Thomas, Lymington and 19 July 2014 at St Ambrose, Westbourne*

Tchaikovsky: Romeo and Juliet overture

Rodrigo: Concierto de Aranjuez (Soloist: Steven Joseph, winner of our 2014 Age 21+ Concerto Competition)

Rachmaninov: Symphony no 2

*12 December 2014 at St Ambrose, Westbourne*

Johann Strauss: Die Fledermaus overture

Tchaikovsky: Symphony no 5

3 Christmas pieces (arrangements of Silent Night and Winter Wonderland, plus Leroy Anderson's Sleigh Ride).

*25 January 2015 at St Ambrose, Westbourne*

Orff: Carmina Burana (in conjunction with a workshop choir including members of Bournemouth University, The Broadstone Choir, Total Voice Choir and featuring St Mary's School, Poole).

Conductor: Lee Marchant, Leader: Stefan Defilet, Soloists:

Baritone - Alex Cook

Tenor - Stephen Pember

Soprano - Natalie Davies

Choirmasters: Ian Davis and David Everett

Following the success of the Age 21+ Concerto Competition in 2012, we again organised and sponsored such a competition, and the winner, guitarist Steven Joseph duly performed with us in our July concerts.

Orchestra members continue to find concert performances very enjoyable, as do our audiences, which appear to be growing again. At the same time as providing this enjoyment to members and the public, we have continued to raise significant funds (again over £1,000 during 2014-2015) for other charitable organisations.

Patrick Lee

Chairperson

17 June 2015