



Trustees' Annual Report for the period

	Period start date				Period end date		
From	01	Sept.	2022	To	31	August	2023

Section A Reference and administration details

Charity name

Other names charity is known by

Registered charity number (if any)

Charity's principal address

Postcode

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
1	David Brindley	Trustee Chair		None
2	Hannah Watson	Trustee Vice Chair		
3	Simon Marrow	Trustee Treasurer		
4	Vicky Giliker	Trustee Secretary		
5	Louise Davies	Trustee	wef 24 March 2023	
6	Allie Spencer	Trustee		
7	Rachel Verdicchio	Trustee		
8				
9				
10				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
None	

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document)	Constitution
How the charity is constituted)	Charitable Incorporated Organisation, registered 20 December 2019 [replacing PDMC Charitable Association No.1002890]
Trustee selection methods	Election at AGM

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

We attach trustees to ensembles, whenever possible, to provide an insight into the core activities of the charity, alongside an opportunity to make a practical contribution.

We have designated trustees attached to Safeguarding and Health & Safety procedures.

PDMC is a partner in the Derbyshire Music Education Hub, which is led by the Derby and Derbyshire Music Partnership. This enables us to access public funding via the Arts Council from the Department for Education.

The trustees maintain a Handbook, reviewed annually and primarily for use by Ensemble Directors (EDs) and parent helpers, which sets out all required procedures and protocols - especially with relation to safeguarding children; equality; health and safety; risk assessments for performances, trips and tours; planning timelines; and financial management.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

The advancement of musical education for the public benefit, in particular among young people of school age in an area bounded by Buxton, Bakewell and Hope Valley by the provision of:

- structured music ensembles to enable participation and progression with the aim of developing confidence and enjoyment of music;
- regular rehearsals, opportunities to perform in both informal and public settings and other enrichment experiences such as tours, trips, workshops and residential;
- opportunities for teamwork and leadership within a structured music making setting.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Having due regard to the guidance issued by the Charity Commission on public benefit, PDMC works tirelessly to bring music making opportunities to young people of school age from all social backgrounds. Section D below gives details of our achievements over the past year.

As a further commitment to public benefit, in recent years the trustees have raised over £24,000 (£2000 in the current year) in grants from local charities and donations, specifically targeted at ensuring that financial hardship is no barrier to a young person's aspirations to learn an instrument or play alongside others. £1708 has been awarded in the past year. We also offer an initial free taster half term to beginners to encourage potential new members.

The trustees have met five times (initially by Zoom conferencing) to monitor the efficiency and effectiveness of the organisation, to plan for long-term financial and musical viability, to maintain a strategic direction and to ensure that all statutory requirements are being met. Financial and management information provided by the Administrator informs close monitoring of the organisation's performance and strategic decision making. The Administrator attends Board and ED meetings and meets as necessary with the Chair and the Strategic Director of Music. The EDs also held two meetings by zoom during the year and the Chair and Administrator regularly communicate by email with them and attend their meetings.

The challenge of increasing player numbers continued, with some new numbers being offset by leavers. However, our starting base of 151 established ensemble players increased by a further 50 members in our new bridging ensembles. As in the previous year, some excellent initiatives and events, whilst proving popular and raising our profile, still failed to produce new recruits. However we were able to continue Bakewell Beginner Strings and Bakewell Beginner Winds, started in the previous summer term.

Hub funding for 2022/23 was based on player numbers in 2021/22, which took a significant hit from Covid. As a result we fell into a lower tier of hub funding and lost £7000 – an amount impossible to recover in the short term, with the result that we finished the year with an operating deficit of £6,000. Again, our reserves had to be significantly drawn upon to the tune of £17,000, not simply to fund bursaries and development opportunities but also to offset our operating deficit. Restoring a balanced budget continues to be an elusive challenge facing the trustees. Fortunately, the increase in membership over the past year thanks to our Engagement Programme has lifted us back into a higher tier of funding for next year.

In an attempt to maximise income, subscriptions were again slightly increased with an even greater increase planned for the following year new. To help parents, a direct debit system for paying subs was introduced; initial take up by about 20 parents with slow but we expect this to grow. We also acquired a Sum Up card reader to maximise bucket collections in these increasingly cashless days.

Our team of eight Ensemble Directors remained stable throughout the year, with Hannah Watson agreeing to take on the Training Strings and Danny Riley continuing for another year with us. ED recruitment remains another major challenge so we were delighted to be able to appoint Tam Wing Kin (Kenneth) in good time, in anticipation of Danny's return to Oxford at the end of the year. Against considerable odds Danny had done a great job for us, steadying the Wind Band, maintaining morale and numbers and directing some excellent playing.

To sharpen the focus of our Strategic Director on strategy, longer term planning and recruitment, his hours were reduced by 40%, with the remainder available if needed to fund operational tasks more cheaply elsewhere. A small Strategy Group comprising two trustees and our Administrator has also been established to steer the work of the Strategic Director.

Trustees agreed several new policies to address Behaviour, Equality and Diversity and Whistle Blowing, as well as a clearly articulated Wind Progression Policy. With regard to statutory matters, the trustees monitor all Charity Commission updates for useful tips and reminders; and keep a particularly close eye on safeguarding and data protection. In particular, we maintain an Online Safety Policy and a Risk Management Statement and Risk Register. EDs also undertake basic First Aid training as a contractual requirement.

Trustees recognise the need to be constantly looking for new fund-raising opportunities. Successful bids resulted in grants from the Ethel James Foundation for £5000 (including for Bursaries), the Freemasons for £600 and the Hub for £1150 to support event costs; and the Derbyshire Community Fund for £1000 towards rental costs. We also received a donation of a sax and a violin.

An unexpected complication occurred when St Thomas More School suddenly declared that they were cancelling all community bookings from the end of the summer term, causing frantic efforts on the part of our Administrator to find new accommodation. Fortunately, we have been able to relocate Friday strings to Buxton Infants School and the midweek Big Band and Beginner Wind Band to Buxton Community School for September.

Summary of Main Activities cont'd ...

A successful mid-year progress review was held in February with the Leader of the Music Education Hub. Detailed actions taken with respect to each of the focus areas and their impact are fully reported in the Year End Evaluation made to the Hub (see Section D below). The Chair also attended the annual Hub meeting for Music Centres in February.

Membership of the Hub entitles us to the services of the Hub Area Leader, Dan Timmins, who acts as a musical adviser and is responsible for the quality control of all musical activity and for the professional development of our ensemble directors. He also has a role in supporting our Strategic Director of Music and he has contributed to our revival planning.

We maintain close links at both Chair and ED level with our Hub neighbour, Dark Peak Music Foundation, with a commitment to maintaining joint concerts and initiatives when possible.

All our EDs are engaged with a local Music Service through which they receive updates, including on key issues such as Safeguarding, and a certain amount of professional development. Further to this, the trustees provide funding so that EDs may keep their First Aid training up to date. Kenneth Tam will be at our next ED to attend the Conducting Course at the RNCM, funded by the Hub and PDMC.

PDMC personnel are all self-employed and provide contracted services, which are reviewed annually. PDMC personnel make up a dedicated and talented team which serves the organisation with distinction and flair and which delivers the considerable benefits and successes experienced by our young musicians.

PDMC attracts considerable support from the players' parents, several of whom actively support the work of the charity. All current trustees are either past or present parents. Parent helpers provide weekly administrative and safeguarding support for our ensemble rehearsals, as well as at performances and on trips and tours. They also help with fund-raising. The organisation is deeply indebted to its volunteers and sincerely acknowledges the contribution of our parent volunteers, as well as the contribution of contracted personnel.

In an effort to engage more parents, the Chair wrote personally to every one of them for the start of the year with a letter delivered through their letter boxes. We held our AGM during Friday evening rehearsal time at St Thomas More School. A small number of parents attended for a very constructive discussion and we were able to recruit another parent trustee as a result.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grant making;
- policy programme related investment;
- contribution made by volunteers.

To ensure that financial hardship is no barrier to participation in PDMC, free membership is automatically awarded to children eligible for free school meals and a discount is automatically available for the third child from the same family.

In addition, we operate a Bursary Scheme, which draws on grants made to PDMC by other local charities. A Discretions Panel, made up of three trustees who are not current parents, considers other requests for free, or discretionary rate, ensemble membership. Financial support may also be requested for participation in tours and, for both PDMC players and others, instrumental lesson costs, along with loan instruments, if needed. Requests can be made on an application form or online.

Volunteers are crucial to the organisation, providing the Board membership, parent helper support for the EDs at weekly rehearsals and at several public concerts each year, fundraising, and help with summer tours and trips.

Section D Achievements and performance

Summary of the main achievements of the charity during the year

Over the year we provided music making opportunities for over 200 young players, ranging from preparatory to senior level ensembles, and including some in our Engagement Project.

Ensembles

This year we have been able to maintain 10 established ensembles:

- 4 string ensembles: Training ; Intermediate ; Orchestra - in Buxton
Beginners in Bakewell
- 5 wind ensembles: Beginner ; Intermediate ; Wind Band - in Bakewell
Beginners in Buxton & in Hope Valley
- Big Band: with over 20 players, in Buxton

We also trialled a new choir for a short time and we were able to run five additional bridging ensembles as mentioned under Engagement Projects below.

Ensemble Directors

It is good to report that our team of 8 ensemble directors remained constant throughout the year.

Rehearsals

A full programme of face to face weekly term time rehearsals took place throughout the year in our normal venues of St Thomas More School, Hope Valley College and Lady Manners School.

Engagement Projects

We initiated five engagement projects in Harpur Hill Primary School (a mixed band), Buxton Infant (recorders) & Junior (percussion and recorder) Schools, and St Anne's RC Primary School (recorders); and we held discussions with several more schools regarding possible engagement projects in the new school year.

Annual Concerts and Performances

- Sunday afternoon and evening Christmas concerts at Lady Manners School, Bakewell
- Our Spring Gala concert with all our ensembles in the Octagon, Buxton
- Our Big Band played its regular spot at the Leek Arts Festival in May, and at Brough Park in June, and also played twice on the bandstand in Buxton's Pavilion Gardens in May and June
- This year's summer concert, delivered in collaboration with Thornbridge Hall, featured all our ensembles, dotted around the Hall's gardens on a sunny July afternoon.

Other Major Initiatives and Events

These events were all designed to raise the profile of PDMC and also to recruit new players, the former objective proving easier, thanks to excellent events and experiences, to achieve than the latter, with only a small number of new players recruited. However, they did involve a great deal of very fruitful collaboration and also helped raise some useful funds from bucket collections and donations.

- In November we hosted a Benedetti Foundation regional event in local venues for both our own and other players, and including a session for music teachers, from around the area.
- In February our Big Sing event at St John's Church, Buxton - preceded by a workshop in each school - attracted 200 young pupils, and parents, from all but one of Buxton's primary schools. Unfortunately, this did not generate sufficient numbers to sustain a newly launched junior choir.
- In March we invited children from Wind WOpps groups in three local schools to our Friday rehearsals in Bakewell. This was a lovely event and produced a small number of new recruits.

Summary of Main Achievements cont'd

- We used our all day booking of the Octagon for our spring gala to run a wind workshop with nationally acclaimed Steve Pycroft of the Kaleidoscope Orchestra. This was attended by wind band players from Lady Manners School and Hope Valley College.
The workshop culminated in an original performance of Steve's arrangement of music by Avicii, directed by Danny Riley. Steve also filmed the whole day as a commission to produce a promotional video for PDMC.
- In April and May, our String and Wind players respectively, performed with a small group of players from the Northern Chamber Orchestra in Buxton Spring Gardens to promote an initiative called Orchestra Live, a Heritage Action Zone Buxton Our Street project.
- We were also invited by the Buxton International Festival to provide a group of string buskers to play on the Opera House forecourt prior to an evening opera premiere and Nicola Benedetti's afternoon concert.

PDSO Tour of Devon and Cornwall

22 string players enjoyed a four day tour, based at Truro High School for Girls. Performances were given on the journey down at Dalwood Community Centre in Devon (our original contact for the tour) and then at Trelissick Garden (National Trust), Princess Pavilion, Falmouth and the school hall. There were disappointing audiences at the latter two events but excellent and appreciative audiences at the first two. In their specially commissioned hoodies, the players enjoyed good weather throughout and trips to Falmouth and Hidden Valley Puzzle Park. As always our young people were excellent ambassadors for PDMC. The tour was organised entirely by PDMC, and its success relied very heavily on an invaluable contribution to the planning by Marion Redman, our Administrator.

With the pandemic now behind us, PDMC is able to demonstrate again our reputation for nurturing young players and developing them into accomplished performers and, thanks to the skills and imagination of our EDs, for the high standards of ensemble playing achieved. Our players continue to audition successfully for the County Orchestra and Wind Band, and even for the National Youth Orchestra. A good many continue their music-making into adult life after leaving PDMC and some pursue professional careers in music. Indeed, some have returned to perform star solo roles in various public performances in the town.

A further significant achievement of the past year has been a real cementing of our relationship with schools across our patch. Our Engagement Project, some great collaborative events and the networking efforts of our Strategic Director have had a major impact. Several of our parents, past and present, have key roles in local schools and their support has been invaluable; and the fact that one of our trustees is a local primary school headteacher with direct access to the local cluster of schools has been of enormous benefit.

PDMC is a member of the Derbyshire Music Education Hub and is required to engage in an annual Service Level Agreement. Three priority areas had been identified, and were evaluated as shown, for the year:

1. *To ensure the continuing revival of PDMC provision by:*
 - *consolidating and growing the recently re-established beginner groups and the green shoots of collaboration with primary schools through the Primary Ensemble Project (now the PDMC Engagement Project) etc.*
 - *restarting a Youth Choir and delivering the Big Sing project;*
 - *involvement with the Benedetti Foundation;*
 - *pursuing collaborative initiatives both across ensembles and with kindred organisations.*

- wind & string beginner groups started in Buxton & Bakewell

- primary ensemble project started in three local primary schools, with two more on stream for next year
 - an impressive Big Sing project good for PDMC profile but unfortunately failed to result in a new choir: different strategy adopted for next year
 - we served as a Benedetti regional centre: again excellent for our profile but very few new recruits
 - it is now common practice for ensembles to perform in combination; and good liaison with DPMF and local secondary schools
2. *To review and restructure the organisation's management structures and personnel to expedite delivery of new initiatives and to ensure a Board focus on strategic and financial issues.*
- role of Strategic Director of Music re-focussed away from operational detail to more strategic planning, with key Administrator support
 - increased direction and oversight by Board of proposed events and initiatives
 - smarter Board agenda and outcomes
3. *To address our serious budget deficit through:*
- *interrogation of all current expenditure and income streams;*
 - *the development of a timed recovery plan*
 - *a renewed focus on fund-raising and grant applications*
 - tighter controls so far failing to dent growing deficit
 - increasing members identified as key to recovering £7k lost from Hub grant (principal cause of deficit)
 - grants & donations received from Foundation Derbyshire, Freemasons & Ethel James Trust
4. *To devise and implement ways to strengthen parental engagement, including trustee recruitment and opportunities for parents to participate in music making.*
- three new trustees (all parents of recent leavers) recruited
 - well attended and positive parental meeting post-AGM – several good ideas & offers
 - strengthened team of parent helpers
 - clear desire to create a PDMC community orchestra, to include parents

Section E Financial review

Brief statement of the charity's policy on reserves

A reserve roughly equal to two years' funding from the Derbyshire Music Education Hub is retained; this currently stands at £40k and is reviewed annually.

A further restricted reserve, currently of approx. £17.3k, is available for specific earmarked purposes, including bursaries to address hardship, with funds released only as qualifying costs are incurred. A further unrestricted reserve of approx. £9k is available to fund specific improvements and developments, approved by the trustees; this latter fund is depleting.

Details of any funds materially in deficit

None.

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Our main sources of funding are the Derbyshire Music Education Hub grants; membership subscriptions; concert profits; donations; and other fundraising.

We operate a Friends Scheme to allow our supporters to make regular, gift-aided whenever possible, donations.

Our main expenditure is on the provision of ensemble venues, EDs and assistants, and administrative services.

A Virgin Money interest paying charity account is operated in order to maximise the return on reserve monies not immediately needed.

Section F Other optional information

n/a

Section G Declaration

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

Signed on behalf of the charity's trustees

Signature

Full name

Position

Date

David Brindley
Chair

22 November 2023