



## Trustees' Annual Report for the period

From 1 April 2022  
Period end date

Period start date to 31 March 2023

Charity name: The Suffolk Organists Association

Charity registration number: 299408

### Objectives and Activities

|  | SORP reference     |  |
|--|--------------------|--|
| Summary of the purposes of the charity as set out in its governing document  | Para 1.17          | <b>To promote the tuition and performance of organ music</b>       |
| 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 | <b>To support tutors, trainees, students, practicing organists</b> |
| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit   | Para 1.18          | <b>Trustees have regard to the guidance</b>                        |

### Additional information (optional)

You may choose to include further statements where relevant about:

|  | SORP reference |  |
|--|----------------|--|
| Policy on grant making   | Para 1.38      | <b>To provide tuition to students of all ages by way of professional teaching by accredited tutors, to assist with purchase of music, and provision of advice on learning programs</b> |
| Policy on social investment including program related investment | Para 1.38      | <b>Not applicable</b>  |
| Contribution made by volunteers                                  | Para 1.38      | <b>Providing meeting venues, tuning organs, arranging concerts, stewarding events, arranging committee meetings, managing website, publishing newsletters and journals</b>             |
| Other  |                | <b>Not applicable</b>  |

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## 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      | <b>Students have progressed through Associated Board exams to and beyond university organ and choral scholarships. Promotion of church and organ music through concerts, lectures, and demonstrations.</b> |

### Additional information (optional)

You may choose to include further statements where relevant about:

|  |           |  |
|--|-----------|--|
| Achievements against objectives set                          | Para 1.41 |  |
| Performance of fundraising activities against objectives set | Para 1.41 |  |
| 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 | <b>Surplus donations invested in building society account</b>                           |
| Statement explaining the policy for holding reserves stating why they are held   | Para 1.22 | <b>Income for providing masterclasses, and tuition derived from interest on savings</b> |
| Amount of reserves held  | Para 1.22 | <b>Approx £130k</b>   |
| Reasons for holding zero reserves  | Para 1.22 |   |
| Details of fund materially in deficit  | Para 1.24 |   |
| Explanation of any uncertainties about the charity continuing as a going concern | Para 1.23 |   |

### 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 |  |
| Investment policy and objectives including any social investment policy adopted | Para 1.46 |  |
| A description of the principal risks facing the charity                         | Para 1.46 |  |
| Other   |           |  |

## Structure, Governance and Management

|   |           |   |
|---|-----------|---|
| Description of charity's trusts:  |           |   |
| Type of governing document<br>(trust deed, royal charter)   | Para 1.25 |   |
| How is the charity constituted?<br>(e.g unincorporated association, CIO)  | Para 1.25 | <b>Affiliated to Incorporated Association of Organists (IAO).</b>                                       |
| 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 | <b>Voluntary proposals for election by general membership to governing Council for defined periods.</b> |

### 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 |  |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 |  |
| Relationship with any related parties   | Para 1.51 |  |
| Other   |           |  |

### Reference and Administrative details

|                             |   |
|-----------------------------|---|
| Charity name                | The Suffolk Organists Association                                       |
| Other name the charity uses | Suffolk Organists Association   |
| Registered charity number   | 299408  |
| Charity's principal address | Ridgeways, The Street,<br>Charsfield,<br>Woodbridge<br>Suffolk IP13 7PU |
|                             |   |

**Names of the charity trustees who manage the charity**

|    | <b>Trustee name</b>  | <b>Office (if any)</b> | <b>Dates acted if not for whole year</b> | <b>Name of person (or body) entitled to appoint trustee (if any)</b> |
|----|----------------------|------------------------|--|--|
| 1  | Charles Roger Pulham | Treasurer              | 2014 to present                          |  |
| 2  | Paul Austen          | Membership secretary   | 2018 to present                          |  |
| 3  | Stepehen Hogger      | Secretary              | 2016 to present                          |  |
| 4  | Alan Loader          | President              | 2023 to present                          |  |
| 5  |                      |                        |  |  |
| 6  |                      |                        |  |  |
| 7  |                      |                        |  |  |
| 8  |                      |                        |  |  |
| 9  |                      |                        |  |  |
| 10 |                      |                        |  |  |
| 11 |                      |                        |  |  |
| 12 |                      |                        |  |  |
| 13 |                      |                        |  |  |
| 14 |                      |                        |  |  |
| 15 |                      |                        |  |  |
| 16 |                      |                        |  |  |
| 17 |                      |                        |  |  |
| 18 |                      |                        |  |  |
| 19 |                      |                        |  |  |
| 20 |                      |                        |  |  |

**Corporate trustees – names of the directors at the date the report was approved**

| <b>Director name</b> |  |  |
|----------------------|--|--|
|                      |  |  |
|                      |  |  |
|                      |  |  |
|                      |  |  |
|                      |  |  |
|                      |  |  |

**Name of trustees holding title to property belonging to the charity**

| <b>Trustee name</b> | <b>Dates acted if not for whole year</b> |  |
|---------------------|--|--|
|                     |  |  |
|                     |  |  |
|                     |  |  |
|                     |  |  |
|                     |  |  |

## 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                         |  |

### Additional information (optional)

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

| Type of adviser | Name | Address |
|-----------------|------|---------|
|                 |      |         |
|                 |      |         |
|                 |      |         |
|                 |      |         |

#### 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)

C.R.Pulham

Full name(s)

Charles Roger Pulham

Position (eg Secretary,  
Chair, etc)

Treasurer

Date

18 January 2024



### Treasurer's Report April 2022 – March 2023

Figures in italics show previous year

| Headline figures  | £                |
|---|------------------|
| Members' subscriptions. m/class fees & donations                                | 1,749.00         |
| Operating costs   | 1,467.73         |
| Excess income over expenditure  | 251.27           |
| <b>Income and other inputs 2022/2023</b>  |                  |
| Transfer of interest from investment account                                    | nil              |
| Gift Aid tax rebate   | 608.03           |
| Members' subscriptions, donations, masterclass fees                             | 1,794.00         |
| Interest on investment account  | 974.27           |
| Legacies (Hazell Trust)   | 55,000.00        |
| <b>Total</b>  | <b>58,376.30</b> |
| <b>Income and other inputs 2021/2022</b>  |                  |
| <i>Transfer on interest from investment account</i>                             | <i>1,000.00</i>  |
| <i>Gift Aid tax rebate</i>  | <i>nil</i>       |
| <i>Members' subscriptions and donations</i>                                     | <i>933.00</i>    |
| <i>Legacy (D.Hatcher)</i>   | <i>11,896.99</i> |
| <i>Interest on investment account</i>   | <i>410.23</i>    |
| <i>Total</i>  | <i>14,240.22</i> |
| <b>Expenditure 2022/2023</b>  |                  |
| Admin, sponsoring, IAO cap, IAA sub, website, insurance, room hire              | 1,004.73         |
| Journal   |                  |
| nil   | 463.00           |
| Tuition m/class exes<br>(Inc unrepresented St. M le T. sponsor's cheque 300.00) |                  |
| <b>Total</b>  | <b>1,467.73</b>  |
| <b>Expenditure 2021/2022</b>  |                  |
| <i>Admin, IAO cap, expenses, IAA sub, website, insurance</i>                    | <i>1,673.09</i>  |
| <i>Tuition, Suffolk Music Festival, bursaries</i>                               | <i>nil</i>       |
| <i>Journal printing and exes</i>  | <i>1,458.43</i>  |
| <i>Total</i>  | <i>3,131.52</i>  |
| <i>Transfer of legacy to investment account</i>                                 | <i>11,896.99</i> |
| Santander cheque account opening balance 1 April 2022                           | 1,615.03         |
| Santander cheque account closing balance 31 March 2023                          | 7,474.33         |
| Ipswich / Suffolk Building Society investment account 7/02/23                   | 131,114.03       |
| Ipswich / Suffolk Building society No. 1 account                                | 29.39            |
| Collection made at Corn exchange held on behalf of Ipswich Arts Association     | 414.80           |

C.R.Pulham 20 April 2023



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C.R.Pulham 20 April 2023