



**SMART**  
**(Suffolk Music & Arts Alumni Trust)**  
Charity number: 1177728

# **Trustees' Annual Report & Financial Statement**

**1<sup>st</sup> April 2021 to 31<sup>st</sup> March 2022**

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## Reference and Administrative Information

### Trustees

|                     |                                                           |
|---------------------|-----------------------------------------------------------|
| Ms Rebecca Reidy    | Co-Chair                                                  |
| Miss Victoria James | Co-Chair and Grants Officer                               |
| Mr William Peall    | Vice Chair & Designated Safeguarding Officer              |
| Mrs Wendy James     | Treasurer & Fundraising Officer                           |
| Mrs Carly Markkanen | Membership Secretary & Lead Board Member for Safeguarding |
| Miss Sarah Waller   | Community Music Officer (office vacated 20/12/21)         |
| Mr Jake Batley      | Community Music Officer                                   |
| Miss Grace Harman   | Media and Publicity Officer                               |
| Mr Nathan Austin    | Committee Member                                          |

### Nominated Trustees

|                 |                                       |
|-----------------|---------------------------------------|
| Mr Ben Chadwick | Head of County Music Service          |
| Mr Callum Given | Head of Community, Britten Pears Arts |

**Office Address:** SMART, % Mr W Peall, Unit 11, Ip-City Centre, 1 Bath Street, Ipswich, IP2 8SD

**Charity number:** 1177728

**Auditors:** Mr Timothy Green FCMA, Beechwood Consulting, 29 Beechwood Drive, Crewkerne, Somerset, TA18 7BY

**Bankers:** Lloyds Bank Plc, Chelmsford Legg St Osc, 1 Legg St, Chelmsford, Essex, CM1 1JS

**Charity's Object:** To relieve the needs of young people from Suffolk who have needs by reason of youth; in particular, but not exclusively, by the provision of grants to access or participate in art in its widest form, including music.

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# Trustees' report

## Overview

**Our vision:** all young people in Suffolk have access to arts opportunities.

**Our mission:** we fund access to arts opportunities for the young people of Suffolk, by using the skills, passion and experience of Suffolk arts alumni and supporters.

Since our inception in 2018, we have built our board of trustees, grown our membership, grown our funds, put on several member events (Latitude 2019 being a highlight), and put in place much of the infrastructure needed to run a charity. Importantly, we have been able to start awarding grants and scholarships to young people in Suffolk needing our support: we have now supported 7 people with grants and scholarships totalling over £3,700, an average award of over £525.

Over the last year, the trustees have worked on setting our strategy for the next phase of SMART's existence, to ensure SMART grows and develops and can support more of the young people of Suffolk. This has guided us for the remainder of the 2021/22 financial year, and will inform our plans for the next few years.

We have now set our vision and mission (see above). Four strategic pillars guide all our work towards this vision and mission. Each pillar has a set of actions to help us understand who we can work with and what they need, build our profile, leverage connections with partners, and deliver on each of the strategic pillars.

1. **Deliver funding** to young artists in Suffolk who need it
  - Understand who needs our support & why
  - Build profile with young artists
  - Leverage connections with Suffolk arts organisations to engage young artists seeking support
  - Deliver grants & scholarships
2. Grow an engaged **membership** to drive fundraising activity
  - Understand what our members want and can offer
  - Build profile with existing and potential members
  - Leverage connections with Suffolk arts organisations to drive new members
  - Deliver member events to raise funds
3. Build and maintain **funds** to support our mission
  - Understand opportunities for revenue streams & potential donors
  - Build profile with potential donors
  - Leverage connections with Suffolk arts organisations to raise funds
  - Deliver an increase in available funds
4. Build a strong **identity**
  - Tell a clear story about our work
  - A strong & diverse board with balanced skills

- Appropriate governance for our size
- Establish reputation as a well-run, impactful charity

As we grow, we will look to expand beyond our roots in the Suffolk County Music Service, supporting young people and drawing members from across all arts forms.

We have also agreed the values that will guide how we carry out our work. We are:

- **nurturing**: we nurture individuals
- **equitable**: we aim to create equity within the arts
- **collaborative**: we work with others to achieve our vision

It has been an exciting few months as we started to work towards this strategy. We conducted a members survey, updated our website to reflect our strategy, and started to meet with potential partners who could help us spread the word about SMART, help us to reach more young people who need our funding, help us to grow our members, and help us reach potential donors. See below for more about the actions we've taken so far towards each of our strategic aims.

### Deliver funding to young artists in Suffolk who need it

|                                                     |                                                          |
|-----------------------------------------------------|----------------------------------------------------------|
| <b>Funds available to distribute during 2021/22</b> | SMART: £1000   FoSYM: £5,000   Scholarships: 2           |
| <b>Grants awarded (£)</b>                           | SMART: £126   FoSYM: £2062.50*   Scholarships: 2 (£1027) |
| <b>Grants awarded (#)</b>                           | 4* (SMART: 1   FoSYM: 3*)                                |
| <b>Scholarships awarded (#)</b>                     | 2                                                        |
| <b>Average award amount (£)</b>                     | £536                                                     |
| <b>Arts disciplines supported</b>                   | Music                                                    |

\*One award of £1,165 from FoSYM was also reported in last year's annual report - the award was granted during the 2020/21 financial year, and paid during the 2021/22 financial year. Going forwards, awards will be reported in the year they are paid.



**Geographic Distribution of Awards**

SMART offers two funding streams to support talented and committed young people in need of financial support:

- One-off **grants** (available to all art forms),
- **SMART scholarships** (which can help enable access to Suffolk County Music Service tuition and ensembles).

For the 2021/22 academic year, the following funds were available:

- Grants:
  - £1,000 from SMART's general funds
  - £5,000 from a ringfenced fund which we received from the former *Friends of Suffolk Youth Music* (FoSYM), which must be used to support Suffolk County Music Service activity, in line with the objects of FoSYM
- SMART scholarships
  - Up to 2 scholarships funded from the FoSYM ringfenced fund

Despite our efforts at publicity (through the Suffolk County Music Service, Suffolk schools, our website, social media and word of mouth), we were not receiving as many grant applications as we would have expected. This may have been in part due to the impact of Covid-19 limiting arts activities taking place, but more probably was because potential grant recipients were not aware of SMART. Towards the end of year we started to build connections with other arts organisations around Suffolk, to help us find out more about young people that might need our support, and to help us build our profile with those young people.

#### - **Grants**

As above, we awarded four grants this year and have been delighted to hear about the excellent progress our recipients are making, support by SMART's funding.

"He is making fantastic **progress**...performing his first ever solo piece at St Edmundsbury Cathedral in their public lunchtime recital series back in July."

"He plays the flute beautifully and is keen to play to family, neighbours, and anyone else that would like to hear him! He has said that he is **really enjoying** flute and he is **looking forward** to learning how to read music properly."

#### - **SMART Scholarships**

At the end of the 2020/21 financial year, we launched our SMART Scholarships for talented and committed young people in challenging circumstances and/or in need of financial support. The scholarships are funded by the ringfenced FoSYM fund.

The scholarships will initially provide up to 50% of one year's funding for young people in Years 7-13 to continue their musical learning through Suffolk County Music Service tuition, to attend a Suffolk County Music Service area ensemble, and towards any instrument hire costs. It is our ambition to continue funding SMART scholars throughout their musical development up to the age of 18, subject to SMART's financial position and satisfactory review of the scholars' performance and commitment.

We were delighted to award our first two scholarships in November 2021, for the 2021/22 academic year and have received the most heart-warming feedback from our first scholars:

“It is not only a huge **financial burden lifted**, but a very welcome recognition of the commitment, effort and progress they have made so far...It's a real boost that will help sustain and propel them forward. SMART has offered an **otherwise unobtainable opportunity** to participate in orchestras and ensembles and continue with lessons. The benefits they have **gained socially and in personal confidence** is noticeable; improved confidence has helped improve their academic attainment and how they mix with others.”

**Build and maintain funds to support our mission**

|                                      |                                                                                                                                                                      |
|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Income</b>                        | £6,572 (SMART)<br>£107 (FoSYM)                                                                                                                                       |
| <b>Income streams</b>                | Ardonagh Trust: £5,000<br>Gift Aid: £848<br>Concert collections: £609<br>Interest on savings (FoSYM): £106<br>Amazon/Paypal/Everyclick: £74<br>Member donations: £40 |
| <b>Core running costs (% income)</b> | £720 (10.7%)**                                                                                                                                                       |
| <b>Fundraising costs</b>             | £32 (0.05%)                                                                                                                                                          |
| <b>Total funds</b>                   | £44,967 (SMART: £12,800   FoSYM: £32,167)                                                                                                                            |

Our main source of income was a £5,000 grant from the Ardonagh Trust, awarded as part of the Bright Futures Prize which trustee Grace Harman won. At the end of the 21/22 financial year, we had not yet allocated this funding, but the trustees have discussed it being used to help subsidise the increased costs of Suffolk County Music Service ensemble tours in Summer 2022, therefore benefitting approximately 100 young people.

We also received £898 from a Gift Aid claim, which includes our backdated claim in respect of donations since we registered with HMRC in 2018.

We raised £609 through collections and raffles at the Suffolk Youth Music ensembles Gala Concert Tour in July 2021.

£106 interest was received from a £20,000 investment of FoSYM funds in a 18 month Fixed Term Deposit account.

£114 was raised through member donations, PayPal Giving, Amazon Smile and EveryClick.

**Grow an engaged membership to drive fundraising activity**

As at the end of March 2022, we had 131 active members (an increase of 5 from last year). While our membership numbers have remained fairly static this year, we have started to lay some foundations to grow our membership in the future, both within our roots in the Suffolk County Music Service, and more widely across other youth arts in Suffolk.

In December, we contacted our members and supporters as we wanted to hear from them, to better understand who needs our support and why, and understand what our members want, need, and can offer. The results were very helpful and our members showed interest in taking part in large and small scale events and commented that they enjoyed receiving our newsletters. We took the decision to remove member profiles from the website as this was not seen as a huge benefit to membership. Survey respondents also showed interest in masterclasses and concerts, and group fundraising challenges. We were also thrilled to hear that our members are keen to volunteer to help at fundraising and member events. We learned that, as our members and supporters are spread across the country (and the world), they were keen to make events available to those not living in Suffolk. Going forward, we will explore the possibility of hybrid events combining in person and online participation. In addition, more than 50% of respondents said they would be willing to make annual donations, so we will retain free membership, and send an annual reminder to members of the impact their donations have to encourage them to donate again.

We have kept in touch with members through three newsletters throughout the year. Our plans for a member get-together at the 2020/21 AGM in December 2021 were curtailed by Covid-19 developments, so the AGM was held over Zoom instead. We would like to do more to build our profile with existing members, and deliver what our members want, so they can help support our mission to deliver funding for young people in Suffolk. We are working on some ideas for the coming year.

We have also raised our profile with potential members during the year: Ben Chadwick has supported us reaching current SYM members, sharing videos about our work, and enabling our presence at the Suffolk Youth Music Gala Concert Tour in July 2021. We plan to start reaching out to other Suffolk youth arts organisations in the coming year, to help us grow a wider membership.

## **Building a strong identity**

### **- Building our profile and telling a clear story about our work**

We updated our website in March 2022, simplifying the structure and copy to reflect our strategy. This is a work in progress, and we are planning further updates to include more about our work.

Our presence at the Suffolk Youth Music Gala Concert Tour in July 2021 helped raise our profile with potential beneficiaries, supporters, members and donors.

We have identified several potential partners and connections, who might be able to help spread the word about SMART, to help us reach more young people who might benefit from our grants, to help us grow our membership beyond our roots in the Suffolk County Music Service, and to help us reach anyone who may be in a position to donate to support our work. We met with some of these potential partners in March 2022, when the SMART trustees hosted a reception at Britten Pears Arts' Celebration event. Several contacts from the Suffolk arts industry attended, and we shared more about SMART's work with them and explored areas of potential collaboration. A big thank you to Britten Pears Arts for co-hosting the reception with us.

We continue to be active on social media using a variety of platforms:





Website: [www.SuffolkSMART.org](http://www.SuffolkSMART.org)

Facebook page: <https://www.facebook.com/SuffolkSMART/>

Twitter: @SuffolkSMART <https://twitter.com/SuffolkSMART>

Instagram: @SuffolkSMART

We have seen consistent engagement on our social media platforms, and continue to grow our following.

|                                                                                   |                                                                                   |                                                                                    |                                                                                     |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|  |  |  |  |
| 5,304 page reach                                                                  | 97 followers*                                                                     | 110 followers*                                                                     | 3353 total views*                                                                   |
| 181 max reactions                                                                 | 9748 total impressions                                                            | 111 max video views                                                                |                                                                                     |
| 208 page likes                                                                    | 111 max engagements                                                               | 23 max post likes                                                                  |                                                                                     |
| 237 page follows                                                                  |                                                                                   |                                                                                    | *to date                                                                            |

In addition, we have continued to build connections with local businesses, media organisations and radio stations to publicise our activity and grants.

#### - Trustees and governance

As at the end of March 2022, we had 8 elected trustees and 2 nominated trustees. We currently have two vacancies for elected trustees, and two vacancies for nominated youth trustees. Nominated youth trustees are appointed by the Suffolk Music Education Hub, and must be participants in a Suffolk-based, youth music or other arts organisation (aged over 16).

Sarah Waller (elected trustee) resigned as a trustee at the AGM in December 2021, staying on as a supporter and member. Kayleigh Bishop (nominated youth trustee) also resigned as trustee during the year. Thanks to both Sarah and Kayleigh for all their contributions during their time as trustees. Nathan Austin and Carly Markkanen (elected trustees) stood down and were re-elected at the AGM in December 2021.

David Stowe (nominated trustee) resigned as a trustee when he retired from his role as Head of Suffolk County Music Service in July 2021. We thank David for all his contributions to SMART; in particular he was instrumental in setting up the SMART scholarships. Ben Chadwick, Interim Head of Suffolk County Music Service, has stepped into the role as nominated trustee. Ben has worked hard to raise SMART's profile with current Suffolk Youth Music members, with potential grant and scholarship recipients (through staff at the Suffolk County Music Service), and with potential donors.

During the year we reviewed each trustee's roles and responsibilities, identified skills gaps, and formalised the roles of Fundraising Officer (Wendy James), Media & Publicity Officer (Grace Harman), and Community Music Officer (Jake Batley). We also discussed creating the role of Grants Officer who would take on the responsibility of administering the grants from application stage all the way through to award and receiving feedback from recipients to include in our messaging and promotion. This role will also ensure the anonymity of recipients. Vicky James will take on this role initially. We also conducted a diversity and inclusion board audit. We will use

every vacancy as an opportunity to work towards a strong and diverse board with balanced skills. Currently we are looking to strengthen the board's experience in finance, marketing and fundraising. We have actively advertised a Treasurer role among our own networks, volunteer/charity networks and Suffolk-specific networks, but have so far been unsuccessful in recruiting. Wendy James continues as Interim Treasurer in the meantime.

## Statement of financial activities for the year ending 31<sup>st</sup> March 2022

|                                                  | 31st March, 2022 |                    |
|--------------------------------------------------|------------------|--------------------|
| <b>Income</b>                                    |                  |                    |
| Member Donations                                 | £ 40.00          |                    |
| Ardonagh Trust Grant                             | £ 5,000.00       |                    |
| Paypal Giving Fund                               | £ 3.50           |                    |
| Fundraising - sponsored events, collections, etc | £ 609.30         |                    |
| Amazon Smile                                     | £ 55.28          |                    |
| EveryClick (Give as you Live)                    | £ 15.64          |                    |
| Interest received on FoSYM funds                 | £ 106.83         |                    |
| Gift Aid Claimed                                 | £ 848.36         |                    |
|                                                  |                  | <b>£ 6,678.91</b>  |
| <b>Expenditure</b>                               |                  |                    |
| Grants - SMART fund                              | £ 126.00         |                    |
| Grants - FoSYM fund                              | £ 2,062.50       |                    |
| Scholarships - FoSYM Fund                        | £ 1,027.50       |                    |
| Goodbox costs/fees                               | £ 5.11           |                    |
| Insurance                                        | £ 523.44         |                    |
| Paypal fees                                      | £ 1.02           |                    |
| Miscellaneous Resources                          | £ 9.20           |                    |
| MemberMojo subscription renewal                  | £ 75.00          |                    |
| Information Commissioner's Office Fees           | £ 35.00          |                    |
| Prize/Gift                                       | £ 16.98          |                    |
| Website renewal                                  | £ 86.40          |                    |
|                                                  |                  | <b>£ 3,968.15</b>  |
| Surplus/(Deficit) for year                       |                  | £ 2,710.76         |
| Surplus/(Deficit) brought forward                |                  | £ 42,256.13        |
| <b>Total</b>                                     |                  | <b>£ 44,966.89</b> |
| <b>Represented by:</b>                           |                  |                    |
| Current Account                                  | £ 35,913.32      |                    |
| Instant Access Savings Account                   | £ 9,003.59       |                    |
| Paypal Account                                   | £ 49.98          |                    |
|                                                  |                  | <b>£ 44,966.89</b> |
| <b>Made up of:</b>                               |                  |                    |
| Restricted Funds (FSYM balance)                  | £ 32,292.90      |                    |
| General Funds                                    | £ 12,673.99      |                    |
| <b>Total</b>                                     |                  | <b>£ 44,966.89</b> |

## Treasurer's statement

### Income:

The COVID Pandemic again impacted upon the charity's ability to fundraise, although the Suffolk Youth Orchestra's Summer Tour of Suffolk enabled us to raise our profile and raise funds at the same time (£609.30). Grace Harman, Trustee, applied for and was awarded a grant of £5,000 from the Ardonagh Trust.

A small amount of income (£114) was raised through donations, PayPal Giving, Amazon Smile and Every Click (formerly Just Giving).

Interest of £106.83 was received from a £20,000 investment of FoSYM in an 18 month deposit account. When this matured, the bank were no longer offering such an investment opportunity.

We had kept good records of Gift Aided donations since the charity's inception and this allowed us to claim £848.36 in Gift Aid from HMRC.

### Outgoings:

£126.00 and £2062.50 were made in grants and £1027.50 in scholarships. This was below our planned expenditure. £523.44 is shown as being paid for insurance. Due to confusion with reimbursement of insurance payments to a trustee, this figure includes insurance for 2020/21, 2021/22 and insurance running into 2022/23 - three sums of £174.48. In future years, the insurance will be paid directly from SMART accounts rather than by a trustee and then reimbursed.

Other outgoings are required for the running of the charity: Membermojo subscription (£75.00), website subscription (£86.40) and ICO fees (£35.00).

PayPal donations (£1.02) and donations through our GoodBox card reader (£5.11) incur a small cost.

A prize to reward contributions to a member survey was purchased for £16.98.

Raffle prizes for the SYO tour were donated.

£9.20 was spent on purchasing resources for our publicity display, other resources were donated.

### Grants:

#### FoSYM funds:

Grants for County Music Service activities: £2,062.50

Scholarships for County Music Service activities: £1027.50

#### SMART funds:

A £126 grants was made from these funds.

### Reserves:

As of 31st March 2022, funds were in the following accounts:

Current Account: £ 35,913.32

Instant Access Savings Account: £ 9,003.59

PayPal Account: £ 49.98

Reserves are broken down as follows:

£ 32,292.90 (restricted FoSYM) and £ 12,673.99 (general SMART funds) - Total reserves: **£ 44,966.89**

| Reserves                           | 2021/22            | 2020/21            | 2019/20            | 2018/19           |
|------------------------------------|--------------------|--------------------|--------------------|-------------------|
| Restricted Funds (FoSYM balance)   | £ 32,292.90        | £ 35,276.07        | £ 35,276.07        | £ 0.00            |
| General Funds                      | £ 12,673.99        | £ 6,980.06         | £ 4,544.11         | £ 1,967.71        |
| <b>Total</b>                       | <b>£ 44,966.89</b> | <b>£ 42,256.13</b> | <b>£ 39,820.18</b> | <b>£ 1,967.71</b> |
| Increase/decrease on previous year | £ 2,710.76         | £ 2,435.95         | £ 37,852.47        | -                 |