

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**

**(A company limited by guarantee)**

**UNAUDITED**

**TRUSTEES' REPORT AND FINANCIAL STATEMENTS**

**FOR THE YEAR ENDED 31 MAY 2019**

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
**(A company limited by guarantee)**

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**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**

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**REFERENCE AND ADMINISTRATIVE DETAILS OF THE CHARITY, ITS TRUSTEES AND ADVISERS  
FOR THE YEAR ENDED 31 MAY 2019**

**Trustees**

Mr C A Strutt, Chair  
Dr I O Akintunde, Vice Chair  
Dr A F R Wolfe, Treasurer  
Mrs I Henderson  
Mrs R C Seager  
Mrs K Addison

**Company Registered Number**

05794153

**Charity Registered Number**

1117159

**Registered Office**

Sunbeams Music Centre  
Stoller House  
Redhills  
Penrith  
Cumbria  
CA11 0DT

**Company Secretary**

M J Lawson-Johnson MRSM

**Chief Executive**

Annie Mawson MBE, MRSM

**Accountants**

Full Circle Accountancy Limited  
Chartered Accountants  
12 The Office  
Mardale Road  
Penrith  
Cumbria  
CA11 9EH

**Bankers**

Barclays Bank plc  
Market Square  
Penrith  
CA11 7YB

Penrith Building Society

7 King Street  
Penrith  
CA11 7AR

**Musical Patrons**

Liam Fray - The Courteeners  
Philip Glass  
Justin Pearson

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**REFERENCE AND ADMINISTRATIVE DETAILS OF THE CHARITY, ITS TRUSTEES AND ADVISERS  
FOR THE YEAR ENDED 31 MAY 2019**

**Advisers (continued)**

**Patrons**

Susan Bagot MBE

Hal Bagot

Lord Melvyn Bragg

Lady Eileen Carey

Lady and Sir James Cropper KCVO

The Rt. Rev. Richard Garrard

Vicki Green

The Rt. Rev. Bishop Laurie Green

Neville Howard

Julia Linnette

Lara Rostron

# **ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**

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## **TRUSTEES' REPORT FOR THE YEAR ENDED 31 MAY 2019**

The Trustees present their annual report together with the financial statements for the year ended 31 May 2019. The Trustees confirm that the Annual Report and financial statements of the company comply with the current statutory requirements, the requirements of the company's governing document and the provisions of the Statement of Recommended Practice (SORP), applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) as amended by Update Bulletin 1 (effective 1 January 2015).

Since the charity qualifies as small under section 383, the strategic report required of medium and large companies under The Companies Act 2006 (Strategic Report and Director's Report) Regulations 2013 is not required.

### **OBJECTIVES AND ACTIVITIES**

#### **POLICIES AND OBJECTIVES**

In setting objectives and planning for activities, the Trustees have given due consideration to general guidance published by the Charity Commission relating to public benefit.

The Trust's key objectives are to relieve sickness and assist in the treatment of children and adults who are suffering physically, emotionally, psychologically and mentally by the provision of music therapy and to provide introductory music therapy training to individuals working with such persons.

#### **ACTIVITIES FOR ACHIEVING OBJECTIVES**

##### **1.1 Sunbeams Music For Life® Programme including Family Learning.**

Music for Life® is a specialist and innovative programme, pioneered by Sunbeams Founder, Annie Mawson in 1992. Through structured interactive workshops, our 11 specially trained professional musicians use music as a tool for therapeutic and developmental benefit for groups of disabled and disadvantaged children and adults of all ages.

##### **1.2 Sunbeams Music For Dignity® Programme**

The programme will be delivered to elderly people with severe Dementia/Alzheimer's with the aim of relieving suffering, and encouraging communication and social inclusion. The wishes of elderly people who have led amazing lives are often ignored. They want Sunbeams to restore their self-respect through participating in our music sessions - and give them back their dignity.

See our website [www.sunbeamsmusic.org](http://www.sunbeamsmusic.org) for a more detailed description of the aims and examples of how Sunbeams Community Music Programmes have transformed the lives of our beneficiaries, whatever their age.

### **2. Performance**

#### **2.1 Sunbeams Concert Troupe**

The Sunbeams Concert Troupe consists of 20 adults with a wide range of disabilities. The Troupe bring their show to theatres, village halls, and churches in rural isolated areas. They have received wide acclaim, especially since September 2011 when they were invited to perform at a lunch-time concert at the prestigious venue of the Church of St Martins-in-the-Field in Trafalgar Square in London. They were invited, not because of their disabilities but because of "their excellence". The Troupe continues to delight audiences whilst challenging individual attitudes towards disability, thus breaking down barriers of prejudice and strengthening communities. The members of the Sunbeams Concert Troupe have themselves been transformed by their self-improvement and development, which has led to their social inclusion within their communities.

#### **2.2 Presentations and Lectures**

Sunbeams endeavours to widen the general awareness of the charity's aims and how these are achieved. Annie Mawson, our Founder and Chief Executive is also an International Harpist and Singer. She presents a demanding schedule of recitals and concerts throughout the year - an average of 50 presentation and lectures per annum to groups e.g. Medical Societies, Soroptimists, Rotary Clubs, corporate professionals, on the use of Arts in Health with regard to the positive benefits of the work of Sunbeams. Her national concerts /recitals continue to raise an average of £50,000 per annum for Sunbeams.

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### **TRUSTEES' REPORT (continued) FOR THE YEAR ENDED 31 MAY 2019**

#### **2.3 World-Class Concerts**

In 1992, Sunbeams instigated world-class music to rural/isolated parts of Cumbria where music by internationally renowned artistes was then difficult to access. The Northern Sinfonia Orchestra performed in a field in Coniston - marking the founding of the Trust. Since then, Sunbeams has developed a Concert Programme to bring world-class musicians to Cumbria to deliver concerts in rural isolated areas thereby providing increased access and participation in the Arts for those previously excluded. Artistes include The Locrian Ensemble, Europe's leading Guitar Quartet - Aquarelle, O DUO, formerly the BBC Young Musicians of the Year, Chris Laurence Jazz Quartet., and Guy Johnson, world-class cellist. A concert arranged for March 2015 also featured ex-Moody Blues and 10CC band members!

#### **3. Training**

Sunbeams is recognised as an Accredited Learning Centre No.54076 in partnership with Open Awards, (formerly Open College Network North-West.) Now that we have our Centre, Sunbeams can offer an innovative and ground breaking service that is unique to the UK. Underpinned by the principles of the Sunbeams Music For Life® Programme, it will offer access to educational and vocational development through 16 Accredited Music For Life® Training modules for severely disabled adults. The new Sunbeams Music Centre will allow delivery of these Specialist Training Services when funding is available.

#### **3.1 Residential Training Week**

The Sunbeams Board, staff, musicians and volunteers all benefit enormously from Annual Training when everyone has an opportunity to be together. Our work is often demanding, both physically and emotionally, and thus time spent together for intensive counselling, training and updates is essential and invaluable.

Our achievements are an indication of the strong infrastructure of the charity, including Trustees/Directors and Staff, as well as the remarkable professionalism, dedication and talent of the musicians who all contribute to the on-going high standard and quality of Sunbeams services. Leadership and staff are outstanding, with the experience, qualifications, skills and empathy, able to deliver Sunbeams' vision and mission.

## **ACHIEVEMENTS AND PERFORMANCE**

### **REVIEW OF ACTIVITIES**

#### **REPORT BY ANNIE MAWSON MBE, FOUNDER AND CHIEF EXECUTIVE.**

For a Musical Charity/Organisation, we are not very good at "blowing our own trumpets!" But we DO know that the impact of our work, has had, and IS having, a profound effect on over **3,000 Cumbrian children and adults with disabilities**. They benefit from our specialist Community Music Therapy workshops throughout Cumbria, from Warcop to St Bees, from Carlisle to Barrow, Ulverston to Cleator Moor.

Sunbeams is an organisation which has had significant influence in Cumbria since I, Annie, founded it in 1992 to bring "the power of music" to people of all ages who are disadvantaged or disabled. In a nutshell – Sunbeams has grown from a small Arts organisation with £13.40 in its bank account, and run from my sitting room, to one of the most innovative, high-achieving, "hands-on" organisations in the country with an annual budget of almost £400,000, and now running from its own world-class £2.5 million National Sunbeams Music Centre, just outside Penrith. Run by Cumbrians FOR Cumbrians – all this money has been re-invested into the Cumbrian economy – but the most important investment has been the annual tangible increase in the quality of life of the Sunbeams beneficiaries as we strive to make a real difference to peoples' lives through the power of music.

Our mission states:

***"Sunbeams helps disadvantaged individuals improve their quality of life and self-esteem through the creative freedom of music."***

12 specialist musicians are matched to community groups of disabled and disadvantaged people of all ages, throughout Cumbria, to deliver interactive workshops in our unique Music For Life® and Music For Dignity® programmes. Projects are delivered mostly free of charge to groups of up to 30 children or adults with disabilities. All on a monthly basis, and many of them weekly. Our Graduate Musicians use a wide range of live musical interventions tailored to each group's

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### **TRUSTEES' REPORT (continued) FOR THE YEAR ENDED 31 MAY 2019**

needs. Through structured inter-active Community Music Therapy Workshops, specially-trained professional musicians use music as a tool for therapeutic and developmental benefit for these groups. We aim to improve their quality of life and provide a unique yet innate means of communication, even if all other strategies have failed, and encourage personal development and self-expression.

#### **WHERE WE WORK**

In Year Ending May 2019, Sunbeams delivery took place in:

A) Our award-winning bespoke SUNBEAMS MUSIC CENTRE:

- 1322 live workshops for 930 different children and adults with complex needs
- 24 professional concerts for 1,632 Children and adults

B) 64 urban and rurally-isolated OUTREACH VENUES throughout Cumbria, serving 1,476 beneficiaries

- 47 Residential Care Homes for 1,118 people with dementia
- 6 Day Centres for 106 adults with severe learning and physical disabilities
- 3 Hospices for 28 people with life-limiting illnesses.
- 4 Special Schools for 106 children with learning disabilities
- 4 Sunbeams out-of-school clubs, for 118 disabled and disadvantaged children, many of whom have complex medical needs. We have just successfully applied to the National Community Lottery Fund previously BIG Lottery Fund – for £210,000 to deliver Musical Workshops to 30 non-verbal children using Augmentative Communication techniques such as Eye-Gazing computers for Children with quadriplegic Cerebral Palsy. Feb.2019 – January 2022.

This is a hugely exciting and innovative project, and we are delighted.

C) 20 members of The Sunbeams Concert Troupe continue to challenge the general public's perceptions of people with severe learning disabilities, with their amazing concerts e.g. once included in 2011 a sell-out concert at St Martin-in-the-Field, London. No wonder they are really known as "The Sunbeams Divas!"

#### **THE NEED SUNBEAMS IS ADDRESSING and THE IMPACT OF OUR WORK.**

Sunbeams is now one of the leading Arts in Health organisations in the UK. We aim to tackle the serious challenges raised by social exclusion, deprivation, ill-health and inequality, through the transformative power of our Community Music Therapy. All the Sunbeams beneficiaries suffer from varying disabilities - including physical disabilities; learning disabilities; mental health issues; Alzheimer's/senile dementia; autistic spectrum disorder; Down's syndrome; emotional and behavioural disturbance; complex medical needs. Many of our beneficiaries faced a bleak future before enjoying their participation at Sunbeams Music Trust.

**"At Music For Life® there are never any wrong notes, only the person's notes: notes aren't moral."  
(Quote from Annie!)**

At Sunbeams we have evidence to prove that music has the power to unlock the strongest of defence mechanisms, and help people of all ages realise their full potential. The purpose of our Music For Life® and Music For Dignity® programmes is to cut across barriers, alleviate feelings of exclusion and humiliation, help family members learn/interact on an equal footing and reaffirm the identity of each beneficiary, promoting their learning, self-confidence and well-being. Sunbeams has been a successful Music Therapy Charity for 27 years, working with people with a full range of complex special needs. There has been a steady and sustainable growth over these years. We are very proud to have received many accolades – including this one from Sir Clive Booth when he was Chief Executive of the Big Lottery, applauding the work of Sunbeams on BBC Radio 4 as

"an exemplar of innovation and excellence for people with Learning Disabilities"

Sunbeams is now the largest charity in the country using 'Music For Life'® and 'Music For Dignity'® with people who are disadvantaged. Following an analysis of all the Project Evaluations, and after discussion with the musicians, the managers and the beneficiaries, where possible, it is evident that our programmes have brought about fundamental changes in the lives of our clients. We have always maintained that the benefits of Music For Life® and Music For Dignity® are as varied as the clients themselves but our evidence shows that they work:

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**TRUSTEES' REPORT (continued)**  
**FOR THE YEAR ENDED 31 MAY 2019**

- By helping to relieve the suffering and improve the quality of life, the self-esteem and the social skills of people with disabilities, as well as those disadvantaged by their isolation.
- By improving their ability to communicate, which in turn has led to increased opportunity for people with disabilities to integrate and communicate more easily in the community.
- By improving their physical and mental well-being and thus foster fun and a sense of community belonging

As one parent said “..... ***until your life is touched by a child with additional needs, you cannot really appreciate the value of a charity like Sunbeams. Their Music Workshops are truly life-changing.***”

**TRACK RECORD - INCLUDING AWARDS & ACCOLADES**

- 1992.Sunbeams founded by Harpist/Singer Annie Mawson MBE, when Special School closed where she taught elective-mute children who communicated by singing. They inspired Annie to found Sunbeams, ensuring their transformative progress, through music therapy.
- Bank Account opened with £13.60 donated by Annie's 8yr old niece who sold 'conkers' from family farm!
- 1992.Concert by Northern Sinfonia Orchestra marked founding of Annual Fund-Raising Programme, since including Celebration and Fund-Raising Events at House of Lords in 2015 and Kensington Palace in 2017
- 1995. Annie and a group of 8 girls with Learning Disabilities played their Celtic Harps at the Royal Festival Hall at the National Mencap Festival, representing Sunbeams and the North of England. The girls called themselves “The Dancing Drum” - a pun on Downs Syndrome (their own choice!)
- 1995 ITV made a documentary, “The Secret Heart”, featuring Sunbeams and the Dancing Drum and American Composer Philip Glass
- Since 1992, Annie has averaged 100 Harp/Song Recitals every year, for 27 years to raise income for Sunbeams to which she is devoted.
- Sunbeams has grown steadily to deliver FREE Community Music Therapy to over 3,000 different disadvantaged, vulnerable, disabled people, of all ages, 1 mth-107 years young!
- Since 1992 Sunbeams has run successful Music For Life® projects partly funded by Community Fund/Big Lottery grants in 2001-06. Won N West Regional Charity and BIG National Children's Finalist 2006-10, affirming efficacy of our work and proven strong track record.
- Attracted high-profile Patrons such as Sir James and Lady Cropper, Lord Melvyn Bragg, Lady Eileen Carey, Hal and Susie Bagot MBE, Philip Glass (USA composer).
- 2000 Annie plays Celtic Harp and sings for HH Dalai Lama at the World Conference for Peace in Belfast Cathedral and the City Hall, drawing awareness to the work of Sunbeams
- 2000 Annie voted “Cumbria Woman of the Millennium Year” – by the Cumbria communities.
- 2007 Michael Lawson-Johnson, MRSM Development Manager, invited by Prime Minister's Office to contribute to “The Sir Robert Balchin Report” on disability and inclusion. Michael then wrote 16 specialist Sunbeams Music Training modules. Pre-level 1 NVQs in Music For Life® for Adults with profound learning disabilities, applauded by Open Awards (then College), as.....“the best seen for this type of learner”.
- Therefore Sunbeams recognised by Skills for Care NMDSC (No. F126227) for accountability. Complies with Ofsted/Adult Learning Inspectorate Framework as an Accredited Centre (No. 54076) for beneficiaries with profound disabilities.
- 2009-13 Received funding of £464,498, the largest BIG Lottery Family Learning Grant in the country. For



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**TRUSTEES' REPORT (continued)**  
**FOR THE YEAR ENDED 31 MAY 2019**

innovative work with disadvantaged families with children with complex medical needs. Extended to 2014 by the Big Lottery for being exemplary project.

- 2011 The Sunbeams Concert Troupe took London by storm, when they gave a Lunch-time Concert at the prestigious St-Martin-In-The-Field Church, to a packed audience.
- 2012 Intellectually copyrighted Music For Life® and Music For Dignity® programmes with the Patent Office.
- 2013.External Evaluation of Social Return On Investment (SROI). Delivered £8 of social value for every £1 investment in Music For Dignity® Programme for 379 people with dementia; applauded by Rt.Hon. Jeremy Hunt when Minister of State for Health.
- 2014 Annie awarded MBE in the Queen's Honours List .....“in recognition for her exemplary services to Community Music in Cumbria”. Annie firmly believes Music is inside us all - it just requires the right key to unlock it.
- Media partners with the BBC. Annie has made frequent appearances on e.g. BBC Breakfast News, ITV Songs of Praise, GMTV, Radio Cumbria and BBC Children in Need to promote awareness of Sunbeams
- Annual Features/Broadcasts for BBC Children in Need launching their popular programme on Blue Peter in 2013 and featured in November of each year ever since, including the stories of individual children with complex medical needs who attend Sunbeams Sessions regularly. Do please access: .  
<https://www.facebook.com/bbcchildreninneed/videos/2187098211558959/>
- 2014 Sunbeams Children are NO. 1 in the Charts! – with Gareth Malone's All Star Choir singing “Wake Me Up!
- Annie stated on BBC. Radio 4's TODAY programme that our pioneering Music For Life® and Music For Dignity® programmes are renowned for 'reaching the unreachable', fulfilling the gaps in service provision for people with disabilities in Cumbria.
- 2018 Michael Lawson-Johnson MRSM elected as a Member of Royal Society of Musicians, and awarded Honorary professorship for services to Community Music. He received a standing ovation from the members.
- Chief Executive Annie Mawson MBE now regularly delivers seminars in e.g. Health-Care settings, Directory of Social Change, University of Cumbria, about best practice, using evidence to improve organisations/projects/and outcomes. Big Lottery used Sunbeams as flagship charity for 'Supporting Change and Impact Programme' for their Internal Evaluation Training stating:

*“This is an extremely well-managed project with experienced, committed, incredibly well-trained staff, helpers and musicians involved in delivery, passionately committed to their work with disabled children, many of whom are emotionally challenging with deeply debilitating illnesses and shortened life-expectancy. Coupled with a project which is over-achieving against its' targets, this results in a very strong project”*

- **2004-2016. Huge achievement raising £2.5 million to build Sunbeams Music Centre, Penrith., opened officially by Sophie, Countess of Wessex in Feb 2018. From the Centre, we now serve disadvantaged communities throughout Cumbria, raising £400,000+ every year to fulfil our overall aim:**

“To relieve sickness and assist in the remedial treatment of children and adults suffering from physical, emotional, psychological and other mental health problems by the provision of Community Music Therapy.”

I reported on the construction of the Sunbeams Music Centre in last year's Annual Report, but I have to reiterate that this most complex of buildings is so beautiful, that it is still receiving acclaim in RIBA news, International Architectural papers, and astonishes the hundreds of visitors and over 40 organisations who hire the Meeting Room, income which helps to pay for our Community Music Therapy.

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**TRUSTEES' REPORT (continued)**  
**FOR THE YEAR ENDED 31 MAY 2019**

**AWARDS FOR SUNBEAMS MUSIC CENTRE**

MAWSONKERR Architecture & Sustainability

<p><b>LABC 2018</b></p> <p>Shortlisted Northern Best Public Service building</p> <p>Shortlisted Northern Best Educational Building</p> <p>Shortlisted Northern Best Inclusive Building</p> <p>Northern Winner Small Commercial Project of the Yr.</p> <p>National Finalist Small Commercial Project of the Yr.</p> <p><b>Offsite Awards</b></p> <p>Shortlisted Healthcare Project of the Year</p> <p>Shortlisted Best Use of Timber Technology</p> <p><b>Structural Timber 2018</b></p> <p>Shortlisted Healthcare Project of the year</p> <p>Shortlisted Contractor of the Year</p>	<p><b>Architects Journal Awards</b></p> <p>Winner Healthcare and Wellbeing Project of the Year</p> <p><b>Buildings Awards</b></p> <p>Small Project of the Year finalist</p> <p><b>Civic Trust 2018</b></p> <p>Region Award Winner</p> <p>Selwyn Goldsmith for Accessibility Shortlisted</p> <p>Civic Trust Commendation</p> <p><b>Winner Architect of the Year (beating Sir Norman Foster!)</b></p>
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More importantly, the Centre meets the ever increasing demand from over 3,000 people with disabilities whom Sunbeams can now serve. As an International Centre of Excellence, the Sunbeams Music Centre embodies all that Cumbria and The Lake District exemplify – as a place of great natural beauty, and associated cultural excellence, creativity – and well-being. The Centre has created a sustainable legacy for community music therapy for disadvantaged people of all ages across the UK. As Michael Lawson-Johnson, Sunbeams Development Manager says.....

***“You cannot open a door to show a glimpse of possibility and slam it shut. It has now become our moral obligation to provide a pathway beyond”.***

**AJ Architecture wrote:**

*“Young Newcastle practice MawsonKerr Architects has triumphed in the Health & Wellbeing category of the AJ Architecture Awards with its Sunbeams Music Centre.”*

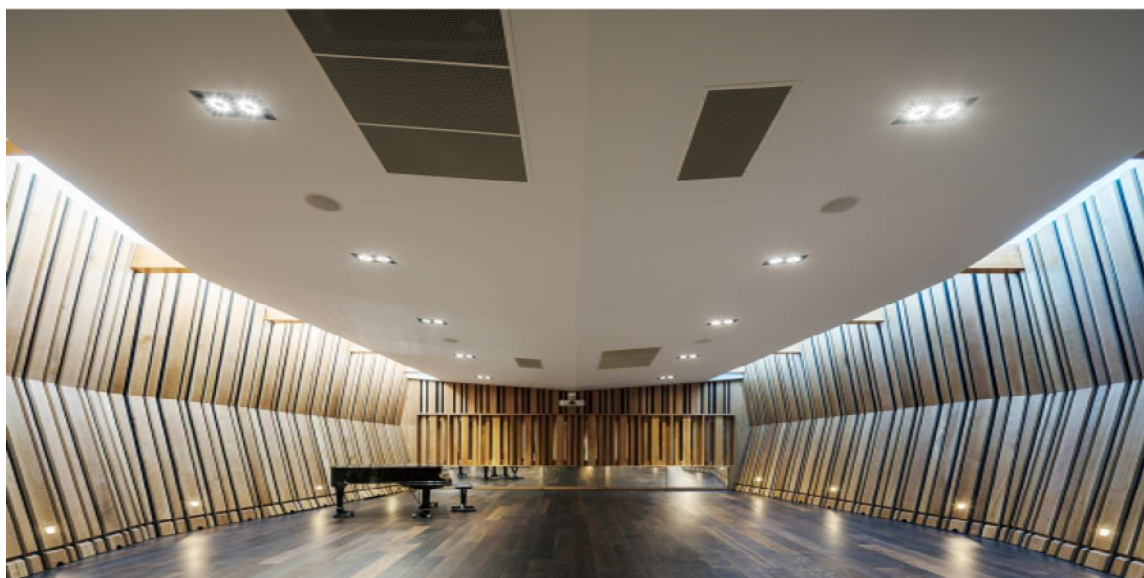
**RIBA wrote:** *“An unusual partnership between client and architect has resulted in an exceptional environment for health and wellbeing in rural Cumbria. houses the Sunbeams Music Trust, which offers music therapy to people with disabilities. An ambitious design executed with great craftsmanship combines with a touch of homeliness to create a very welcoming environment throughout.”*

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**TRUSTEES' REPORT (continued)**  
**FOR THE YEAR ENDED 31 MAY 2019**



We at Sunbeams believe our community is judged by the way it nurtures and includes people who are not able to ask for help. We are determined that our bespoke Centre will serve our beneficiaries with profound and complex needs so that they will no longer feel marginalised, but can find a niche in which to thrive.



**PERFORMANCE HALL – THE GLASSICAL HALL AT SUNBEAMS MUSIC CENTRE.**  
(named after our Patron, Philip Glass, renowned American composer)

We endeavour to eliminate the discrimination and pre-conceptions held by the general public...

**“I used to think people like that should be locked away”...** overheard at a Sunbeams concert. Hence, we have raised over £2.5 million to build our specialist Sunbeams Music Centre which will be - as two of our beneficiaries said - **“a sustainable legacy for disabled people throughout the U.K.”**, and **“where our wheelchairs will be invisible.”**

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**TRUSTEES' REPORT (continued)**  
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**THE IMPACT OF SUNBEAMS' MUSIC FOR DIGNITY®**

**In this year's report, I would like to take this opportunity to inform you of our MUSIC FOR DIGNITY® Programme in more detail – a programme which we are replicating for elderly beneficiaries throughout Cumbria from an original Pilot, and of which we are very proud.**

Here is a summary of what we mean by this wonderful programme. The Outputs, the Impact, Monitoring and the Evaluation, written by Michael Lawson-Johnson are not included.

Our Sunbeams “Music For Dignity®” Project aims to help older disabled people cope with life-changing events such as transition from independence to almost total dependence on carers and nurses, health-deterioration, bereavement - loss of a partner/spouse, and social exclusion in both isolated rural areas of Cumbria, and deprived disadvantaged areas in West Cumbria with very low Indexes of Multiple Deprivation. Our Music for Dignity® Project is a pioneering programme which seeks to reduce the isolation and loneliness experienced by older disabled people, to enable them to make positive lifestyle changes associated with ageing and, ultimately, to bring about a better quality of life as they find new ways to cope with life-changing events.

We ran a pilot funded by the BIG Lottery Silver Dreams programme in 2013. We believe this Music For Dignity® Project was true testimony to the power of music to transform the lives of people with disabilities. Sunbeams was 1 of only 37 charities to receive funding from over 800 organisations which applied. We conducted an External Evaluation which delivered a very impressive Social Return On Investment of £1-8. We have intellectually registered Music for Dignity® as the umbrella name for our work with older people with mental health problems and Dementia. Sunbeams has since been asked to be Dignity Champions for Cumbria by the Care Sector Alliance Cumbria. We have maintained this project ever since through our reserves and from small local funding grants to reach more elderly folk in need and to meet the demand.

We believe music distracts people with dementia, keeping their minds off their pain, whilst engaging in music/dancing/singing, rather than wandering, caught up in their own anxious worlds. They have led amazing lives and should not be ignored. The interactive music rehearsals and concerts in the community are helping them deal with the strain of day-to-day life by relieving distress and giving them back their quality of life, their self-belief ....and their dignity. **Music For Dignity® is filling a real gap in the lives of isolated Older People in Cumbria, helping to stimulate and motivate even those beneficiaries with severe dementia. The project is enabling a marginalised older community to express their hopes and feel “wanted” and once more believe that**

***“Life is still sweet at 80!” and that “You are never too old to have fun!”***



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### TRUSTEES' REPORT (continued) FOR THE YEAR ENDED 31 MAY 2019

#### **THE NEED THAT SUNBEAMS IS ADDRESSING: WHY IS IT IMPORTANT?**

These older people are trying to cope with life-changing events:

- transition from independence to almost total dependence on carers and nurses
- health-deterioration. *"Singing helps Peter's breathing and general health"*
- social exclusion in this isolated rural area. Everyone needs to work together to break down the prejudice which abounds in West Cumbria against disabled people *"...I used to think people like that should be locked away"*.
- bereavement, loss of a partner/spouse. Older people are often forgotten about at this difficult, heart-breaking time.

Music For Dignity® provides a cathartic, emotional outlet for their feelings. Dementia is a terrible disease, with associated care problems. Memory loss, subsequent confusion, distress, anxiety, "wandering", all mean the older frail people are unable to access facilities outside their homes. Unable to articulate their needs to family and carers, they become socially excluded and isolated, withdrawn from society. **They have led inspirational lives, but their wishes are often ignored. They want Sunbeams to restore their dignity and self-respect through music.** Through our research and consultation Sunbeams has identified the older, disabled and vulnerable people who need encouragement to remain active within their communities despite the onset of these changes. 27 years' experience working with disadvantaged and disabled people, has seen Sunbeams' reputation and community presence grow.

Following the pilot project in Cleator Moor, specifically designed to test our approach, follow-up formal and informal consultation evidenced the need and potential for Music For Dignity® Project as a:-

- Social activity that strengthens relationships: *"This is the one day we all meet up together."*
- Way for older people to share their skills and contribute to their community *"...it will get us out and active and give pleasure, and show them what we can still do"*
- Challenge for older people, who want to stay active *"allow us to take part, have something to aim towards, provide us with a challenge"*
- Mentally beneficial activity *"I'm a life-long depressive, but when I sing the first few bars, suddenly the world seems funny again."*

The beneficiaries, many of whom are wheel-chair users have expressed in their own words why Music For Dignity® is so important to their needs:

***"We have a voice, we have brains and we can do things. We want to be integrated and stand on our own two feet - if only!"***

Cumbria has an older, ever-aging population. 27% of residents are aged 60+ compared to 22% nationally with the proportion of older residents increasing at a faster rate. In Copeland District, projections suggest the 65+age group will increase to 30% by 2033, above average for England. Of 354 local authorities, four of Cumbria's councils fall below national average for deprivation including Copeland, at 84th most deprived. In the rankings of health and deprivation, Cleator Moor ranked 18th worst of the 322 **LSOAs** in Cumbria.

Across Cumbria the number of people with limiting long-term illness is set to rise from 45,893 in 2009, to 77,020 in 2030: an increase of 64% (higher than 55% increase expected for England). **These statistics show a real need for alternative, innovative, inclusive and cost-effective activities, promoting better health and wellbeing for older disabled persons in Cumbria, ensuring adequate support services are available to them whilst still living independently, OR once in a home, still linked to the community.**

This is why Sunbeams Music is SO important. The elderly people in the Care Homes, the elderly people with dementia who want to come to the Sunbeams Music Centre, the Managers and Carers, all need the Music For Dignity® project to address these issues.

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**FOR THE YEAR ENDED 31 MAY 2019**

**SUNBEAMS MUSIC FOR DIGNITY® IS FILLING THE GAP**

*"What we had before was rubbish! Since Sunbeams got involved we feel we have a voice. We've got a brain and a right to say what we want!" "When people see us getting out, it will be unbelievable who will join in!"*

**These are the voices of the older people: they want long-term change rather than short-term outputs.**

Due to the size and rural nature of the county (52% of Cumbrian population live rurally) it is difficult for older disabled people to access suitable services, given the lack of participatory health and well-being activities for vulnerable people with dementia. Some of them make a 60 mile round trip to use the Centre so that they can access a new innovative project like this, currently unavailable across the rest of the county – helping older people maintain their dignity. The project will give these vulnerable older people a new focus, keep them active and engaged. The beneficiaries told us they would never have dreamt they could access a project like this. Since developing the project, they feel empowered and **"want to make their wheelchairs invisible"**. Sunbeams can tempt feelings of fellowship, and memories from rosier days which will improve their social integration.

**THE SERVICE WE DELIVER**

**In a "Music for Dignity®" session the power of music in all its forms has been harnessed to bring about real and meaningful improvements in the overall quality of life of vulnerable elderly people. Live music by our specialist and empathetic musicians will:**

- Provide a non-verbal form of communication, if all other forms of communication are lost
- Provide a basis for meaningful reminiscence and discussion, prompted by familiar songs, and a safe emotional outlet for feelings/memories (both happy and sad) that might arise
- Bring about greater awareness of surroundings – bringing them into the present
- Stimulate and engage people who feel they are 'on the slag heap' (their phrase). Show them they are still capable
- Decrease the frequency of agitated behaviours of dementia sufferers, and reduce aggression and frustration
- Bring a group/care home/day centre together and bond them, strengthening bonds between beneficiaries, as well as between them and their carers/support workers, improving relationships and support networks
- Provide an enjoyable, accessible activity, which allows them to achieve something, develop new skills and thereby increase confidence and self-esteem
- Encourage gentle movement of limbs, improving flexibility and mobility
- Encourage the use of the voice, strengthening lung and breathing capacity
- Promote positive changes in emotion state and reduce loneliness
- Act as a non-pharmaceutical form of pain management

**The beneficiaries want to have a voice - literally!** A silent majority is now heard! Pre-conceptions held by the general public are continually being challenged and older people, regardless of their health deterioration and disability now have the opportunity to share their experience, making a positive contribution to their care, services and position within their communities.

Activities and outcomes have been developed and prioritised based on full consultation and discussion with all those beneficiaries who could speak, and their carers from the above venues. Collaboration between everyone is essential for the smooth running of the project, given their vulnerability and the amount of activity, movement and transport involved. We try to encourage meaningful professional, personal relationships through exciting workshops and public concerts in the Care Homes and the Sunbeams Music Centre. They require a lot of careful organisation and support – logistics alone of helping 60+ wheelchair users attend the concerts mean that everyone works together for mutual support. It is a real team effort – with our wonderful team of Volunteers providing amazing support and commitment. We are truly indebted to them for the added value they give so unstintingly to our projects.

Managing better with life-changing events is the underlying theme of our programme. What is needed is an intervention to interrupt a cycle of grief. Music For Dignity® acts as a catalyst in the process of adjustment and help older people build creative friendships within their new-found environments in the Homes and at the Sunbeams Music Centre. Of course, symptoms overlap and are compounded by the mental and physical decline seen with 'normal' aging such as arthritic limbs, circulatory and respiratory problems and deterioration of sight and hearing. Research shows that people with severe physical disabilities experience the changes associated with aging that occur for other people, but these changes tend to occur earlier, and be more debilitating.

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
(A company limited by guarantee)

**TRUSTEES' REPORT (continued)**  
**FOR THE YEAR ENDED 31 MAY 2019**

New, exciting challenges through music and showcasing of long-forgotten skills and experiences takes the older people "out-of-themselves" as they realise life IS worth living, helping them to be calmer and more accepting of this key transition in their lives. They cope better with the often heart-breaking change from independent living to long-term care because they now have something to look forward to, even after bereavement which can trigger dementia.

*"I don't know my own name, but I know I love coming here and feeling so happy when I sing with you."*

Our comprehensive monitoring and evaluation procedures serve to demonstrate the changes and lasting impact of Music For Dignity® - which we hope will lead to spreading the learning and best practice throughout England. We would be proud to replicate "Music For Dignity®" in other venues, to enable older people to find new ways to cope, manage life-changing events and continue to remain part of their communities.



John says:

*"Music has always been important to me. It always has been and always will be. Without Sunbeams Music, my life is not worth living."*



*"Thank you for giving us such fun!"*



**music**  
for dignity®



*"We feel so good, we don't need our walking frames!"*

We cannot stress enough how we want to develop long-term change rather than short-term outputs. The beneficiaries have already asked "What is our final impact?" One of the beneficiaries, said.....  
"The people may change, but the objective remains the same – it will be our legacy to stop older people being so isolated, with nothing to do"

To conclude, in the words of Rachel:

*"The Music workshops by Sunbeams Music for Dignity® project has enabled me and my friends to enhance our love of music, to grow in confidence so we are now able to perform in public. Singing brings us so much joy and gives us a great sense of satisfaction when we can see how much joy we give to others in our community. Music motivates, encourages, gives joy and happiness, helps with our well-being and overall, helps to give us purpose and makes our lives more bearable. We thank you for the opportunity."*

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
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**TRUSTEES' REPORT (continued)**  
**FOR THE YEAR ENDED 31 MAY 2019**

As I write, I can see a striking marquee being erected in our beautiful grounds, in preparation for our very first large-scale Fundraising Celebration – “Posh Frocks And Jeans!” We have sold out - 180 people donating over £90 each – all eager to contribute towards our work. In the past 4 years we have held amazing events in London’s LSO building, the House of Lords, Kensington Palace and Auctioneer Lord Archer has helped us raise over £250,000 in his inimitable style. The momentum created by these prestigious events has really enabled us to feel confident that Posh Frocks will be an equally rewarding and fun evening! More in next year’s Report!

This year has been one of great significance to Sunbeams, as we consolidate our projects, even extending the number of venues where we deliver our programmes. This would be impossible if we did not have the finest of musicians. Most of them have their own bands or ensembles but they give their time and expertise so willingly and without hesitation – so fervent are they to deliver our Mission – a Mission shared by our loyal and dedicated staff, Michael, Liesl, Vanessa, Diane and Pete. And with our wise and committed Board of Trustees, a healthy balance sheet and a bespoke award-winning Centre, Sunbeams Music Trust is well-placed to consolidate its core aims and mission.

Annie Mawson MBE. MRSM. B.A. Hons., Cert.Ed., Dip.Ed. Music Therapy. Founder and Chief Executive





**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
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**TRUSTEES' REPORT (continued)**  
**FOR THE YEAR ENDED 31 MAY 2019**

**INVESTMENT POLICY AND PERFORMANCE**

Investment policy and objectives

The Trustees operate within the governing document, the Memorandum and Articles of Association having regard to the guidance provided by the Charities Commission and act in accordance with the Trustees Act 2000.

**GOING CONCERN**

After making appropriate enquiries, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. For this reason they continue to adopt the going concern basis in preparing the financial statements.

**PRINCIPAL RISKS AND UNCERTAINTIES**

The Trustees have assessed the major risks to the charity, especially those related to the operations and finances of the charity. The charity has systems in place to control and mitigate risks.

- We will ensure the project and any associated risks will be overseen by active Board of 6 Trustees
- Comprises multi-disciplined team with strong representation of people we help and led by a Solicitor
- Experienced in Risk Management principles with proven robust systems, procedures and policies in place covering all aspects of the organization and risk mitigation: Governance, Equal Opportunities, Safe-Guarding, Vulnerable Adults, Health and Safety
- Ensuring people have right skills/knowledge/empathy/experience to deliver our programmes.
- Enhanced DBSs for ALL Sunbeams team with ongoing support, advice and training opportunities available (e.g Handling techniques disabled people) and reinforced at Sunbeams' Training days.

**RESERVES POLICY**

Trustees agreed a policy of maintaining three months value of operational costs as a reserve. This has been reviewed during the year and is still seen as an appropriate balance between the financial probity of the charity without simply keeping money in the bank.

The charity continues to deliver an amazingly valuable service to a wide audience across Cumbria and the North. Frequent comments from beneficiaries, carers and family members, about the beneficial impact that music therapy has, reinforces the drive to build and improve the work that we do.

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
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**TRUSTEES' REPORT (continued)**  
**FOR THE YEAR ENDED 31 MAY 2019**

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

**CONSTITUTION**

Annie Mawson's Sunbeams Music Trust (Sunbeams) is a company limited by guarantee, as defined by the Companies Act 2006. The Trust was originally created as unincorporated charity on 17 January 2000; the limited company was incorporated on 25 April 2006 and registered as a charity with the Charity Commission on 7 December 2006 with all relevant assets then being transferred to the company. The company was established under its Memorandum and Articles of Association which comprise the governing document (as amended 18 August 2006).

**METHOD OF APPOINTMENT OR ELECTION OF TRUSTEES**

The management of the charity is the responsibility of the Trustees who are elected and co-opted under the terms of the Articles of Association.

**POLICIES ADOPTED FOR THE INDUCTION AND TRAINING OF TRUSTEES**

New Trustees, on appointment, have a formal induction meeting with the Chief Executive and are informed of methods of working, current issues, attendance at meetings etc. They are given an information pack comprising guidance on their responsibilities, the most recent Annual Report and Accounts and other documentation concerning current activities and projects. They also attend concerts and workshops run by the organisation to experience the work at first-hand. Ongoing training is provided annually for all Trustees, as well as staff/musicians/volunteers and one-off training is carried out as required.

**ORGANISATIONAL STRUCTURE AND DECISION MAKING**

"Sunbeams" is an independent charity. Annie Mawson's Sunbeams Music Trust has a very active Board of Trustees that meets bi-monthly. They are responsible for the overall management and control of the charity. The Board is provided with monthly financial reports in addition to regular updates and reports from its Chief Executive. The Trustees maintain scrutiny of the major strategic, business and operational risks which the charity faces and confirms that regular reports are produced in order that necessary steps can be taken to manage these risks.

**WIDER NETWORK**

Sunbeams maintains relationships with other legal entities which include:

- ACT (Action for Communities in England)
- BBC Media partnership
- Cumbria CVS (Cumbria Council for Voluntary Service)
- Live Music Now (LMN)
- NCVO (National Council for Voluntary Organisations)

**TRUSTEES' INDEMNITIES**

The charity holds a standard insurance policy which includes a trustees' indemnity against any liability in connection with any negligence, default, breach of duty or breach of trust in relation to the charity.

**FROM OUR TREASURER**

A message from our Treasurer, Dr. A. F. R. Wolfe BSc (Hons), MSc, PhD.

The period of the account runs from 1 June 2018 to 31 May 2019.

The annual accounts, showing income, expenditure, assets and liabilities, for the financial year are laid out elsewhere within this Annual Report. Income generation forecast in the Business Plan continues to develop broadly in line with the forward plan. This is thanks to generous grants and donations from public and private sources. There is still no statutory funding for music therapy, despite incontrovertible evidence of the benefits. This is disappointing but

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
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**TRUSTEES' REPORT (continued)**  
**FOR THE YEAR ENDED 31 MAY 2019**

unsurprising considering the financial pressure on the Health and Care services.

Actual and Budgeted income and expenditure were kept within acceptable margins. This is a reflection of the close and constant management of the finances by our finance personnel in conjunction with the Chief Executive. Costs associated with the operation of the Centre are now in line with budgeting fixed costs. Income generation from the operation of the Centre continues to balance or exceeds the costs.

**FROM OUR CHAIRMAN**

I have loved to see the joy that Sunbeams brings to all who come into contact with our charity for many years. The reach and strength of Sunbeams continues to abound year on year. This year has been no different as Sunbeams now delivers Community Music Therapy to over 3,000 different people of whom 1,729 are monthly and approximately 35% are weekly. For an extremely small team those numbers continue to amaze and are a true testament to the dynamic team of Sunbeams staff and musicians. And then there is Annie Mawson MBE. Annie does not stop; she pursues the world in the certain knowledge that eventually all needs will be the same and special needs can be redacted from the dictionary.

Sunbeams Music Centre continues to provide an inspirational setting for all who visit it and all whom work within and it is so pleasing to see the Centre over-delivering on all we hoped it to be.

Our thanks extend to all who support Sunbeams and constantly wish us well!

Christopher Strutt LLB Hons.



**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**

**(A company limited by guarantee)**

**TRUSTEES' REPORT (continued)  
FOR THE YEAR ENDED 31 MAY 2019**

**TRUSTEES' RESPONSIBILITIES STATEMENT**

The Trustees (who are also directors of Annie Mawson's Sunbeams Music Trust for the purposes of company law) are responsible for preparing the Trustees' report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the Trustees to prepare financial statements for each financial year. Under company law the Trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Trustees are responsible for keeping adequate accounting records that are sufficient to show and explain the charitable company's transactions and disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

This report was approved by the Trustees, on 19 February 2020 and signed on their behalf by:

**C A Strutt, Chair**  
Trustee

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
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**INDEPENDENT EXAMINER'S REPORT  
FOR THE YEAR ENDED 31 MAY 2019**

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF ANNIE MAWSON'S SUNBEAMS MUSIC TRUST (the 'charity')**

I report to the charity Trustees on my examination of the accounts of the charity for the year ended 31 May 2019.

This report is made solely to the charity's Trustees, as a body, in accordance with Part 4 of the Charities (Accounts and Reports) Regulations 2008. My work has been undertaken so that I might state to the charity's Trustees those matters I am required to state to them in an Independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the charity and the charity's Trustees as a body, for my work or for this report.

**RESPONSIBILITIES AND BASIS OF REPORT**

As the Trustees of the charity (and its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the charity are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the charity's accounts carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

**INDEPENDENT EXAMINER'S STATEMENT**

Since the charity's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

I have completed my examination. I can confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities [applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)].

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed:

Dated: 19 February 2020

Jonathan M B Miller FCA DChA

**Full Circle Accountancy Limited**  
Chartered Accountants

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**

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**STATEMENT OF FINANCIAL ACTIVITIES INCORPORATING INCOME AND EXPENDITURE  
ACCOUNT  
FOR THE YEAR ENDED 31 MAY 2019**

	<b>Note</b>	<b>Unrestricted funds 2019 £</b>	<b>Restricted funds 2019 £</b>	<b>Total funds 2019 £</b>	<b>Total funds 2018 £</b>
<b>INCOME FROM:</b>					
Donations and legacies	2	189,452	150,397	339,849	202,654
Charitable activities	3	-	10,041	10,041	14,236
Other trading activities	4,5	37,319	1,196	38,515	82,356
Investments	6	2,292	-	2,292	2,104
Other income		1,571	-	1,571	3,975
<b>TOTAL INCOME</b>		<b>230,634</b>	<b>161,634</b>	<b>392,268</b>	<b>305,325</b>
<b>EXPENDITURE ON:</b>					
Raising funds	5	5,723	1,200	6,923	57,311
Charitable activities	9	193,221	131,430	324,651	310,757
<b>TOTAL EXPENDITURE</b>	10	<b>198,944</b>	<b>132,630</b>	<b>331,574</b>	<b>368,068</b>
<b>NET INCOME / (EXPENDITURE) BEFORE OTHER RECOGNISED GAINS AND LOSSES</b>		<b>31,690</b>	<b>29,004</b>	<b>60,694</b>	<b>(62,743)</b>
<b>NET MOVEMENT IN FUNDS</b>		<b>31,690</b>	<b>29,004</b>	<b>60,694</b>	<b>(62,743)</b>
<b>RECONCILIATION OF FUNDS:</b>					
Total funds brought forward		42,171	2,705,381	2,747,552	2,810,295
<b>TOTAL FUNDS CARRIED FORWARD</b>		<b>73,861</b>	<b>2,734,385</b>	<b>2,808,246</b>	<b>2,747,552</b>

The notes on pages 22 to 33 form part of these financial statements.

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**

(A company limited by guarantee)

REGISTERED NUMBER: 05794153

**BALANCE SHEET  
AS AT 31 MAY 2019**

	<b>Note</b>	<b>£</b>	<b>2019 £</b>	<b>£</b>	<b>2018 £</b>
<b>FIXED ASSETS</b>					
Intangible assets	14		<b>1,010</b>		<b>1,087</b>
Tangible assets	15		<b>2,395,771</b>		<b>2,401,169</b>
			<hr/>		<hr/>
			<b>2,396,781</b>		<b>2,402,256</b>
<b>CURRENT ASSETS</b>					
Debtors	16	<b>65,288</b>		<b>61,402</b>	
Cash at bank and in hand		<b>430,959</b>		<b>348,249</b>	
		<hr/>		<hr/>	
		<b>496,247</b>		<b>409,651</b>	
<b>CREDITORS:</b> amounts falling due within one year	17	<b>(84,782)</b>		<b>(64,355)</b>	
		<hr/>		<hr/>	
<b>NET CURRENT ASSETS</b>			<b>411,465</b>		<b>345,296</b>
<b>NET ASSETS</b>			<hr/>		<hr/>
			<b>2,808,246</b>		<b>2,747,552</b>
<b>CHARITY FUNDS</b>					
Restricted funds	18		<b>2,734,385</b>		<b>2,705,381</b>
Unrestricted funds	18		<b>73,861</b>		<b>42,171</b>
			<hr/>		<hr/>
<b>TOTAL FUNDS</b>			<b>2,808,246</b>		<b>2,747,552</b>
			<hr/>		<hr/>

The charity's financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The Trustees consider that the charity is entitled to exemption from the requirement to have an audit under the provisions of section 477 of the Companies Act 2006 ("the Act") and members have not required the charity to obtain an audit for the year in question in accordance with section 476 of the Act.

The Trustees acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The financial statements were approved and authorised for issue by the Trustees on 19 February 2020 and signed on their behalf, by:

C A Strutt, Chair

Dr A F R Wolfe, Treasurer

The notes on pages 22 to 33 form part of these financial statements.

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
**(A company limited by guarantee)**

**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 MAY 2019**

**I. ACCOUNTING POLICIES**

**I.1 Basis of preparation of financial statements**

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) - (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

Annie Mawson's Sunbeams Music Trust meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy.

**I.2 Company status**

The charity is a company limited by guarantee. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity.

**I.3 Income**

All income is recognised once the charity has entitlement to the income, it is probable that the income will be received and the amount of income receivable can be measured reliably.

For legacies, entitlement is taken as the earlier of the date on which either: the charity is aware that probate has been granted, the estate has been finalised and notification has been made by the executor(s) to the Trust that a distribution will be made, or when a distribution is received from the estate. Receipt of a legacy, in whole or in part, is only considered probable when the amount can be measured reliably and the charity has been notified of the executor's intention to make a distribution. Where legacies have been notified to the charity, or the charity is aware of the granting of probate, and the criteria for income recognition have not been met, then the legacy is treated as a contingent asset and disclosed if material.

Donated services or facilities are recognised when the charity has control over the item, any conditions associated with the donated item have been met, the receipt of economic benefit from the use of the charity of the item is probable and that economic benefit can be measured reliably. In accordance with the Charities SORP (FRS 102), the general volunteer time of the Friends is not recognised and refer to the Trustees' report for more information about their contribution.

On receipt, donated professional services and donated facilities are recognised on the basis of the value of the gift to the charity which is the amount the charity would have been willing to pay to obtain services or facilities of equivalent economic benefit on the open market; a corresponding amount is then recognised in expenditure in the period of receipt.

Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.

Income tax recoverable in relation to investment income is recognised at the time the investment income is receivable.

Other income is recognised in the period in which it is receivable and to the extent the goods have been provided or on completion of the service.



**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
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**NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 MAY 2019**

**I. ACCOUNTING POLICIES (continued)**

**I.4 Expenditure**

Expenditure is recognised once there is a legal or constructive obligation to transfer economic benefit to a third party, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is classified by activity. The costs of each activity are made up of the total of direct costs and shared costs, including support costs involved in undertaking each activity. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs which contribute to more than one activity and support costs which are not attributable to a single activity are apportioned between those activities on a basis consistent with the use of resources. Central staff costs are allocated on the basis of time spent, and depreciation charges allocated on the portion of the asset's use.

Fundraising costs are those incurred in seeking voluntary contributions and do not include the costs of disseminating information in support of the charitable activities. Support costs are those costs incurred directly in support of expenditure on the objects of the charity and include project management carried out at Headquarters. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements.

Costs of generating funds are costs incurred in attracting voluntary income, and those incurred in trading activities that raise funds.

Charitable activities and Governance costs are costs incurred on the charity's educational operations, including support costs and costs relating to the governance of the charity apportioned to charitable activities.

All expenditure is inclusive of irrecoverable VAT.

**I.5 Turnover**

Turnover comprises revenue recognised by the charity in respect of goods and services supplied during the year, exclusive of Value Added Tax and trade discounts.

**I.6 Intangible fixed assets and amortisation**

Intangible assets are capitalised and recognised when future economic benefits are probable and the cost or value of the asset can be measured reliably. Intangible assets are initially recognised at cost and are subsequently measured at cost net of amortisation and any provision for impairment. The charity has registered the trademarks of Music for Life® and Music for Dignity® and is amortising the cost over the estimated useful life of 20 years.

**I.7 Tangible fixed assets and depreciation**

All assets costing more than £200 are capitalised.

A review for impairment of a fixed asset is carried out if events or changes in circumstances indicate that the carrying value of any fixed asset may not be recoverable. Shortfalls between the carrying value of fixed assets and their recoverable amounts are recognised as impairments. Impairment losses are recognised in the Statement of financial activities incorporating income and expenditure account.

Assets in the course of construction are included at cost. Depreciation on these assets is not charged until they are brought into use.

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
**(A company limited by guarantee)**

**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 MAY 2019**

**I. ACCOUNTING POLICIES (continued)**

Tangible fixed assets are carried at cost, net of depreciation and any provision for impairment. Depreciation is not charged on freehold land. Depreciation is provided at rates calculated to write off the cost of fixed assets, less their estimated residual value, over their expected useful lives on the following bases:

Freehold property	-	Land is not depreciated
Long-term leasehold property	-	The charity has not depreciated the Centre in accordance with FRS 102 as the charity has a policy of regular repair and maintenance. The Centre will be kept to its previously assessed standard and the likelihood of its economic obsolescence is minimal.
Plant and machinery	-	25% reducing balance
Motor vehicles	-	25% reducing balance
Fixtures and fittings	-	25% reducing balance
Office equipment	-	25% reducing balance

**I.8 Interest receivable**

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity; this is normally upon notification of the interest paid or payable by the Bank.

**I.9 Debtors**

Trade and other debtors are recognised at the settlement amount after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

**I.10 Cash at Bank and in hand**

Cash at bank and in hand includes cash and short term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account.

**I.11 Liabilities and provisions**

Liabilities are recognised when there is an obligation at the Balance sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably. Liabilities are recognised at the amount that the charity anticipates it will pay to settle the debt or the amount it has received as advanced payments for the goods or services it must provide. Provisions are measured at the best estimate of the amounts required to settle the obligation. Where the effect of the time value of money is material, the provision is based on the present value of those amounts, discounted at the pre-tax discount rate that reflects the risks specific to the liability. The unwinding of the discount is recognised within interest payable and similar charges.

**I.12 Financial instruments**

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value with the exception of bank loans which are subsequently measured at amortised cost using the effective interest method.

**I.13 Taxation**

The charity is exempt from corporation tax on its charitable activities.

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
(A company limited by guarantee)

**NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 MAY 2019**

**I. ACCOUNTING POLICIES (continued)**

**I.14 Pensions**

The charity operates a defined contribution pension scheme and the pension charge represents the amounts payable by the charity to the fund in respect of the year.

**I.15 Fund accounting**

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The costs of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

**2. INCOME FROM DONATIONS AND LEGACIES**

	Unrestricted funds 2019 £	Restricted funds 2019 £	Total funds 2019 £	Total funds 2018 £
Donations - unrestricted	89,452	-	89,452	4,278
Donations - restricted	-	3,000	3,000	32,217
Newcastle Building Society	-	1,950	1,950	2,768
Prism The Gift Fund	-	10,000	10,000	10,000
Legacies	100,000	-	100,000	-
Big Lottery Fund Grant - Reaching Adolescents with Complex Medical Needs	-	-	-	111,944
Sir John Fisher Foundation	-	20,000	20,000	-
Cumbria Community Foundation	-	4,721	4,721	-
Frieda Scott Charitable Trust	-	3,236	3,236	-
Big Lottery Fund Grant - Reaching Communities	-	28,418	28,418	-
The National Lottery Community Fund	-	35,000	35,000	-
BBC Children In Need	-	34,072	34,072	31,447
The Hadfield Charitable Trust	-	10,000	10,000	10,000
<b>Total donations and legacies</b>	<b>189,452</b>	<b>150,397</b>	<b>339,849</b>	<b>202,654</b>
<i>Total 2018</i>	<i>24,278</i>	<i>178,376</i>	<i>202,654</i>	

**3. INCOME FROM CHARITABLE ACTIVITIES**

	Unrestricted funds 2019 £	Restricted funds 2019 £	Total funds 2019 £	Total funds 2018 £
Music For Life®/Music for Dignity®	-	10,041	10,041	14,236
<b>Total 2018</b>	<b>-</b>	<b>14,236</b>	<b>14,236</b>	

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**4. FUNDRAISING INCOME**

	Unrestricted funds 2019 £	Restricted funds 2019 £	Total funds 2019 £	Total funds 2018 £
Fundraising	7,457	-	7,457	64,003
<i>Total 2018</i>	814	63,189	64,003	

**5. TRADING ACTIVITIES**

	Unrestricted funds 2019 £	Restricted funds 2019 £	Total funds 2019 £	Total funds 2018 £
<b>Charity trading income</b>				
Charity trading income	29,862	1,196	31,058	18,353
<b>Fundraising trading expenses</b>				
Charity trading expenses	5,559	-	5,559	3,940
Net income from trading activities	24,303	1,196	25,499	14,413

**6. INVESTMENT INCOME**

	Unrestricted funds 2019 £	Restricted funds 2019 £	Total funds 2019 £	Total funds 2018 £
Bank interest received	2,292	-	2,292	2,104
<i>Total 2018</i>	2,104	-	2,104	

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
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FOR THE YEAR ENDED 31 MAY 2019**

**7. DIRECT COSTS**

	<b>Music For Life® £</b>	<b>Total 2019 £</b>	<i>Total 2018 £</i>
Musicians Fees	<b>37,476</b>	<b>37,476</b>	45,963
Motor, travel and subsistence	<b>16,341</b>	<b>16,341</b>	17,156
Volunteers expenses	<b>814</b>	<b>814</b>	4,787
Staff training	<b>802</b>	<b>802</b>	215
Advertising	<b>280</b>	<b>280</b>	540
Premises expenses	<b>8,903</b>	<b>8,903</b>	-
Wages and salaries	<b>142,059</b>	<b>142,059</b>	149,606
National insurance	<b>16,656</b>	<b>16,656</b>	13,159
Pension cost	<b>4,756</b>	<b>4,756</b>	8,065
Depreciation	<b>19,009</b>	<b>19,009</b>	18,316
	<b>247,096</b>	<b>247,096</b>	257,807
<i>Total 2018</i>	<i>239,491</i>	<i>239,491</i>	

The majority of staff time is spent on the direct delivery of the charity's activities including musical activities. It is therefore appropriate to combine Musicians Fees and approximately 85% of staff costs when comparing costs.

**8. SUPPORT COSTS**

	<b>Music For Life® £</b>	<b>Total 2019 £</b>	<i>Total 2018 £</i>
Staff training	<b>1,371</b>	<b>1,371</b>	212
Advertising	<b>1,032</b>	<b>1,032</b>	-
Insurance	<b>5,113</b>	<b>5,113</b>	5,690
Light and heat	<b>3,437</b>	<b>3,437</b>	5,071
Telephone	<b>2,219</b>	<b>2,219</b>	2,256
General office expenses	<b>978</b>	<b>978</b>	3,289
Premises expenses	<b>16,175</b>	<b>16,175</b>	20,384
Repairs and renewals	<b>6,864</b>	<b>6,864</b>	4,188
Sundry	<b>2,831</b>	<b>2,831</b>	2,070
Legal and professional	<b>-</b>	<b>-</b>	1,404
Computer and IT	<b>277</b>	<b>277</b>	332
Profit/loss on disposal of fixed assets	<b>713</b>	<b>713</b>	-
Wages and salaries	<b>25,584</b>	<b>25,584</b>	-
Depreciation	<b>4,289</b>	<b>4,289</b>	5,440
	<b>70,883</b>	<b>70,883</b>	50,336
<i>Total 2018</i>	<i>44,896</i>	<i>44,896</i>	

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
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**NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 MAY 2019**

**9. GOVERNANCE COSTS**

	Unrestricted funds 2019 £	Restricted funds 2019 £	Total funds 2019 £	Total funds 2018 £
Accountancy	3,311	-	3,311	2,280
Legal and professional	1,451	1,669	3,120	-
Bank charges	71	-	71	103
Trustees expenses	93	-	93	154
Amortisation - intangible fixed assets	-	77	77	77
	<u>4,926</u>	<u>1,746</u>	<u>6,672</u>	<u>2,614</u>

**10. ANALYSIS OF EXPENDITURE BY EXPENDITURE TYPE**

	Staff costs 2019 £	Depreciation 2019 £	Other costs 2019 £	Total 2019 £	Total 2018 £
Expenditure on raising voluntary income	-	-	1,364	1,364	53,371
Expenditure on fundraising trading	-	-	5,559	5,559	3,940
<b>Costs of raising funds</b>	<u>-</u>	<u>-</u>	<u>6,923</u>	<u>6,923</u>	<u>57,311</u>
Music For Life®/Music for Dignity®	189,055	23,298	105,626	317,979	308,143
Expenditure on governance	-	77	6,595	6,672	2,614
	<u>189,055</u>	<u>23,375</u>	<u>119,144</u>	<u>331,574</u>	<u>368,068</u>
<i>Total 2018</i>	<u>170,830</u>	<u>23,833</u>	<u>173,405</u>	<u>368,068</u>	

**11. NET INCOME/(EXPENDITURE)**

This is stated after charging:

	2019 £	2018 £
Depreciation of tangible fixed assets: - owned by the charity	23,298	23,756
Amortisation of intangible fixed assets	<u>77</u>	<u>77</u>

Trustees received reimbursement of expenses amounting to £93 in the current year, (2018 - Trustees - £154).

**12. INDEPENDENT EXAMINER'S REMUNERATION**

The Independent Examiner's remuneration amounts to an Independent Examination fee of £1,680 (2018 - £1,600).

**ANNIE MAWSON'S SUNBEAMS MUSIC TRUST**  
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**13. STAFF COSTS**

Staff costs were as follows:

	<b>2019</b>	<i>2018</i>
	<b>£</b>	<b>£</b>
Wages and salaries	<b>167,643</b>	<i>149,606</i>
Social security costs	<b>16,656</b>	<i>13,159</i>
Pension costs	<b>4,756</b>	<i>8,065</i>
	<b>189,055</b>	<i>170,830</i>

The average number of persons employed by the charity during the year was as follows:

	<b>2019</b>	<i>2018</i>
	<b>No.</b>	<b>No.</b>
Music For Life ®	<b>6</b>	<i>5</i>

No employee received remuneration amounting to more than £60,000 in either year.

**Important note**

The majority of staff time is spent on the direct delivery of the charity's activities including musical activities. It is therefore appropriate to combine Musicians Fees and approximately 85% of staff costs when comparing costs.

**14. INTANGIBLE FIXED ASSETS**

	<b>Trademarks</b>
	<b>£</b>
<b>Cost</b>	
At 1 June 2018 and 31 May 2019	<b>1,549</b>
<b>Amortisation</b>	
At 1 June 2018	<b>462</b>
Charge for the year	<b>77</b>
At 31 May 2019	<b>539</b>
<b>Carrying amount</b>	
At 31 May 2019	<b>1,010</b>
At 31 May 2018	<i>1,087</i>

The following trademarks have been registered by the charity:

Music For Life®  
Music For Dignity®

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**NOTES TO THE FINANCIAL STATEMENTS  
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**15. TANGIBLE FIXED ASSETS**

	Freehold property £	Sunbeams Centre £	Musical instruments £	Motor vehicles £	Fixtures and fittings £	Total £
<b>Cost</b>						
At 1 June 2018	46,442	2,249,099	18,597	17,190	146,121	2,477,449
Additions	-	-	3,990	-	14,623	18,613
Disposals	-	-	-	-	(5,134)	(5,134)
At 31 May 2019	46,442	2,249,099	22,587	17,190	155,610	2,490,928
<b>Depreciation</b>						
At 1 June 2018	-	-	13,211	7,520	55,549	76,280
Charge for the year	-	-	2,673	2,417	18,208	23,298
On disposals	-	-	-	-	(4,421)	(4,421)
At 31 May 2019	-	-	15,884	9,937	69,336	95,157
<b>Net book value</b>						
At 31 May 2019	46,442	2,249,099	6,703	7,253	86,274	2,395,771
At 31 May 2018	46,442	2,249,099	5,386	9,670	90,572	2,401,169

Included in freehold property is land held within the Music For Life® Restricted Fund in connection with the Sunbeams Centre. The land is not depreciated.

**16. DEBTORS**

	2019 £	2018 £
Trade debtors	4,642	7,831
Other debtors	51,500	52,208
Prepayments and accrued income	9,146	1,363
	<u>65,288</u>	<u>61,402</u>

**17. CREDITORS: Amounts falling due within one year**

	2019 £	2018 £
Trade creditors	13,887	10,579
Other taxation and social security	2,618	-
Other creditors	747	566
Accruals and deferred income	67,530	53,210
	<u>84,782</u>	<u>64,355</u>



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**NOTES TO THE FINANCIAL STATEMENTS  
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**18. STATEMENT OF FUNDS**

**STATEMENT OF FUNDS - CURRENT YEAR**

	Balance at 1 June 2018 £	Income £	Expenditure £	Balance at 31 May 2019 £
<b>Unrestricted funds</b>				
General Funds - all funds	42,171	230,634	(198,944)	73,861
<b>Restricted funds</b>				
Music For Life® Restricted Fund	456,282	161,634	(132,630)	485,286
The Sunbeams Music Centre - Stoller House	2,249,099	-	-	2,249,099
	<u>2,705,381</u>	<u>161,634</u>	<u>(132,630)</u>	<u>2,734,385</u>
Total of funds	<u>2,747,552</u>	<u>392,268</u>	<u>(331,574)</u>	<u>2,808,246</u>

**STATEMENT OF FUNDS - PRIOR YEAR**

	Balance at 1 June 2017 £	Income £	Expenditure £	Transfers in/out £	Balance at 31 May 2018 £
General Funds - all funds	50,182	49,524	(57,535)	-	42,171
<b>Restricted funds</b>					
Music For Life® Restricted Fund	528,564	255,801	(310,533)	(17,550)	456,282
The Sunbeams Music Centre - Stoller House	2,231,549	-	-	17,550	2,249,099
	<u>2,760,113</u>	<u>255,801</u>	<u>(310,533)</u>	<u>-</u>	<u>2,705,381</u>

**SUMMARY OF FUNDS - CURRENT YEAR**

	Balance at 1 June 2018 £	Income £	Expenditure £	Balance at 31 May 2019 £
General funds	42,171	230,634	(198,944)	73,861
Restricted funds	2,705,381	161,634	(132,630)	2,734,385
	<u>2,747,552</u>	<u>392,268</u>	<u>(331,574)</u>	<u>2,808,246</u>

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**NOTES TO THE FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 MAY 2019**

**18. STATEMENT OF FUNDS (continued)**

**SUMMARY OF FUNDS - PRIOR YEAR**

	<i>Balance at 1 June 2017</i>	<i>Income</i>	<i>Expenditure</i>	<i>Balance at 31 May 2018</i>
	£	£	£	£
General funds	50,182	49,524	(57,535)	42,171
Restricted funds	2,760,113	255,801	(310,533)	2,705,381
	<u>2,810,295</u>	<u>305,325</u>	<u>(368,068)</u>	<u>2,747,552</u>

**19. ANALYSIS OF NET ASSETS BETWEEN FUNDS**

**ANALYSIS OF NET ASSETS BETWEEN FUNDS - CURRENT YEAR**

	<b>Unrestricted funds 2019</b>	<b>Restricted funds 2019</b>	<b>Total funds 2019</b>
	£	£	£
Intangible fixed assets	-	1,010	1,010
Tangible fixed assets	29,204	2,366,567	2,395,771
Current assets	112,934	383,313	496,247
Creditors due within one year	(68,277)	(16,505)	(84,782)
	<u>73,861</u>	<u>2,734,385</u>	<u>2,808,246</u>

**ANALYSIS OF NET ASSETS BETWEEN FUNDS - PRIOR YEAR**

	<i>Unrestricted funds 2018</i>	<i>Restricted funds 2018</i>	<i>Total funds 2018</i>
	£	£	£
Intangible fixed assets	-	1,087	1,087
Tangible fixed assets	31,977	2,369,192	2,401,169
Current assets	63,403	346,248	409,651
Creditors due within one year	(53,209)	(11,146)	(64,355)
	<u>42,171</u>	<u>2,705,381</u>	<u>2,747,552</u>

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**NOTES TO THE FINANCIAL STATEMENTS  
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**20. RESTRICTED FUNDS BALANCE**

	2019 £	2018 £
General Restricted Fund (including the Centre - Stoller House)	2,529,851	2,402,253
Community Fund	154,390	274,649
Big Lottery Fund Grant - Reaching Adolescents With Complex Medical Needs	-	7,887
BBC Children In Need	3,588	5,964
HSBC	2,209	11,860
Newcastle Building Society	728	2,768
Sir John Fisher Foundation	16,103	-
The Hadfield Charitable Trust	5,000	-
Frieda Scott Charitable Trust	1,390	-
The Prism Charitable Trust	7,500	-
National Lottery Community Fund	17,370	-
Cumbria Community Foundation	(65)	-
Cumbria Waste Management	(6,384)	-
Other funds	2,705	-
	<hr/>	<hr/>
Total	2,734,385	2,705,381
	<hr/>	<hr/>

Cumbria Waste Management funds are paid retrospectively.