

MEETING: 10/04/2014

Ref: 12181

ASSESSMENT CATEGORY - Making London More Inclusive

London Symphony Orchestra Limited

Adv: David Farnsworth

Base: City

Amount requested: £157,155

Benefit: London-wide

Amount recommended: £172,000

Purpose of grant request: Delivery of LSO Create - creative music making activity for adults with learning disabilities at LSO St Luke's, the Barbican and in residential/day care centres.

Background

The LSO is a world-class Orchestra, based in the Barbican. Its mission is to engage the broadest mix of people with the highest quality and most evocative music-making. It has a pioneering education and community programme and attracts highly skilled, virtuosic musicians who are committed to exploring the application of their music practice for social benefit.

LSO Create is a programme of participatory music making activity for adults with learning disabilities. LSO Create participants make the LSO's music education centre, LSO St Luke's, their creative home and they perform on the Barbican stage. Through participation in music making, creating their own compositions, exercising control as they find their creative voice, adults with learning disabilities can feel more confident, stimulated, socially connected, and happier.

Funding History

You have supported LSO on three previous occasions, the first of which was with a capital grant in 1998 for access works to St Luke's. In April 2004 you granted £252,000 for a three-year project working with disabled people; whilst in September 2009 you awarded £180,000 for three years' work with young people in east London. All grants were successfully monitored.

Current Application

This application seeks to build on LSO Create's programme to date, and to capture the learning for wider impact. Over the three years it will support:

- 30 creative music making workshops delivered at LSO St Luke's for adults with learning disabilities and their carers;
- 72 outreach workshops delivering targeted creative music making activity in day care/residential home settings;
- 3 intensive performance projects per year, creating new music compositions using assistive technology and live and acoustic music making, culminating in performance with full Orchestra or section of orchestra;
- 36 lunchtime concerts at LSO St Luke's per year with discussion sessions, and 9 creative workshops for adults with learning disabilities to respond to the music in the concerts; and
- 9 open rehearsals with the opportunity for adults with learning disabilities to meet the musicians before the rehearsal and sit on stage with the Orchestra.

The aim of the activity is to enable more adults with learning disabilities to access and participate in high quality music making activity with a view to increasing happiness and improving listening skills and ability to focus. A further aim is to improve carers' ability to engage adults with learning disabilities in musical activity for their enjoyment and improved sense of well-being.

Financial Observations

Accounts for the year ended 31st July 2013 show a deficit of £221,000 (1.4% of turnover), comprising £184,000 on unrestricted funds and £37,000 on restricted funds. The deficit on unrestricted funds was due to planned spending on charitable activities.

The reserves policy states that the organisation aims to hold unrestricted reserves of between £2m and £4m, which the organisation has calculated as equivalent to between 3 and 6 months' worth of core costs. At 31st July 2013 free unrestricted reserves stood at £2,492,000, which equates to 3.7 months' worth of core costs (or 1.8 months' worth of 2014/15 budgeted expenditure).

The forecast for the current year to 31st July 2014 shows a deficit of £568,651 (3.4% of turnover) on unrestricted funds. Total income is projected to be £15,939,145, of which £14,307,292 (89.8%) has been confirmed as at February 2014.

The budget for 2014/15 shows a further deficit of £462,633 (2.8% of turnover) on unrestricted funds, which the charity explains is due to the ongoing impact of reductions in public funding and commitments to continue to perform high quality concerts at the Barbican Centre and elsewhere. The charity has advised that it is developing new funding sources with the aim of balancing its budget. Total income is anticipated to be £16,536,956, of which £6,814,290 (41.2%) had been confirmed as at March 2014. The charity explains that this level of confirmed income is comparable with previous years and is due to the nature of its contract income, with bookings in place throughout the year, but not all formal agreements having yet been received.

Free unrestricted reserves are forecast to reduce to £1,460,716 by 31st July 2015, which would be below the policy target to hold between £2m and £4m.

Officer's Appraisal

The LSO is a prestigious orchestra and its involvement in this work both benefits adults with learning disabilities and their carers, and also provides an example for other mainstream arts providers. If this application is approved, it will both expand the range of opportunities for people with learning disabilities to access and also, through investing in a comprehensive evaluation of the work, will enable the work and its lessons to be captured and shared with others.

An uplift on the evaluation budget originally submitted is therefore being recommended. This work will also compliment the scoping research you are currently funding through Lemos & Crane which aims to capture the good practice and to identify the barriers for people with learning disabilities accessing mainstream arts and culture.

Recommendation

£172,000 over three years (£54,000; £58,000; £60,000) towards the delivery and evaluation of LSO Create: creative music making activity for adults with learning disabilities at LSO St Luke's, the Barbican and in residential/day care centres.

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: London Symphony Orchestra Limited	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? City	
Contact person: Ms Helen Michaelides	Position: Trusts and Foundations Coordinator
Website: http://lso.co.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 232391
When was your organisation established? 09/06/1904	
<p>Aims of your organisation:</p> <p>The mission of the London Symphony Orchestra is to engage the broadest mix of people with the highest quality and most evocative music-making. The mission will be achieved through three aims:</p> <p>Aim 1 To build on existing work both inside and outside the concert hall and to explore new ideas that inspire all those with whom the LSO works as befits an innovative 21st century orchestra.</p> <p>Aim 2 To engage with communities and new audiences, and to develop existing relationships in London, the UK and worldwide.</p> <p>Aim 3 To underpin all of the LSO's activities with excellent management and organisation and a firm financial base.</p>	
<p>Main activities of your organisation:</p> <p>The LSO promotes and performs approximately 70 concerts at London's Barbican Centre each year, tours extensively around the world, and takes part in numerous recording sessions. The LSO runs a record company, LSO Live; a music education centre, LSO St Luke's, and carries out pioneering work in digital music. LSO Discovery is the Orchestra's learning and community programme, reaching over 60,000 people every year. LSO Discovery seeks to apply innovation, imagination and creativity to its work with people across communities and at all levels of engagement, delivering education and participatory music making projects, artistic development initiatives, choral work and new digital platforms. LSO Discovery's evolving and ambitious programme of music engagement activity</p> <ul style="list-style-type: none"> • responds to the needs of the wider community; • works in partnership with organisations at a local, national and global level; • gives people distinctive participatory opportunities; • paves the way for new approaches; • impacts on the artistic programming and culture of the Orchestra itself. 	

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
70	4	12	15

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Leased	9 years remaining

Grant Request

Details of grant request

Under which of City Bridge Trust's programmes are you applying? Making London More Inclusive
Which of the programme outcome(s) does your application aim to achieve? Disabled people actively taking part in the arts or sport Disabled people reporting increased well-being as a result of taking part in the arts or sport
Please describe the purpose of your funding request in one sentence. Delivery of LSO Create - creative music making activity for adults with learning disabilities at LSO St Luke's, the Barbican and in residential/day care centres.
When will the funding be required? 01/08/2014
How much funding are you requesting? Year 1: £49,725 Year 2: £52,681 Year 3: £54,749 Total: £157,155
Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to fund it? The LSO has a good track record of funding its work through a mixed income model, including funding from trusts and foundations, statutory funding, corporate sponsorship, individual giving, and commercial income. LSO Create will continue beyond the 3-year period subject to funding secured from one of these sources to support the activity.
If you need any planning or other statutory consents for the project to proceed, what stage have the applications reached?

Summary of grant request

LSO Create is a programme of participatory music making activity for adults with learning disabilities. "Many disabled people are excluded from experiencing arts and culture due to the barriers society places on them" Understanding Disabled People as Audiences 2012-13, Shape. Yet, as the DCMS' Taking Part: The National Survey of Culture, Leisure and Sport Adult and Child Report 2011-12 confirmed "engagement with a wide range of cultural activities including heritage, arts and museum and galleries [is] associated with significantly higher levels of subjective happiness".

LSO Create aims to give adults with learning disabilities supported access to mainstream venues and world-class professional artists; opportunities to enjoy high quality music making and explore their creativity; a forum in which to develop their social and personal skills through the collaboration, listening, focus, imagination and communication inherent in composing and playing music; and the opportunity to come together with people from different communities, engaging in social and cultural activity which enriches participants and their carers.

The LSO is a world-class Orchestra, with a pioneering education and community programme. It attracts highly skilled, virtuosic musicians who are committed to exploring the application of their music practice for social benefit. LSO Create participants are empowered by working with such inspirational musicians. Invited into the heart of mainstream culture, as active players and audience, they make the LSO's music education centre, LSO St Luke's, their creative home and they perform on the Barbican stage. Through participation in music making, creating their own compositions, exercising control as they find their creative voice, adults with learning disabilities feel more confident, stimulated, socially connected, and happier.

The Shape report promotes a Social Model of Disability that "takes the focus away from impairment and places responsibility on government, organisations and individuals across all sectors of society, to identify and implement constructive changes to remove barriers and increase access". The emphasis on enabling all people to make music, through individualised, tailored approaches, is at the core of LSO Discovery's creative practice and underlies the work delivered with people with disabilities. This is driving the need to expand the LSO Create programme beyond its current format at LSO St Luke's to:

- Deliver targeted workshops within care settings tailored to individual service users, enabling more in depth activity with people with profound and multiple learning disabilities and portfolio work for individuals and their carers to complete outside of workshops.
- Ensure that the wider programme at the LSO St Luke's is fully inclusive by building relationships with more people with disabilities and organisations in the local area and engaging them with an accessible programme of informal lunchtime concerts and open rehearsals.
- Research the potential of assistive technology and the creation of an interactive app for people with learning disabilities and their carers to engage with the LSO's repertoire and create their own arrangements or new compositional responses to what they are hearing.

Demonstrating good practice, the programme will:

- Implement structured opportunities for participant input including participant focus groups to inform workshop planning in their care settings; a steering group of regular Monday Club attendees to plan/evaluate activity; participant production teams for intensive performance projects; and a participant focus group for app development.
- Be part of an initiative to bring in more people from diverse backgrounds across the local community, through targeted marketing, open access workshops and free entry to both lunchtime concerts and open rehearsals.
- Support volunteers through training and induction tailored to their specific role and recognition in concert programmes.
- Take place at LSO St Luke's where environmentally friendly systems have actively been incorporated throughout the building.

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

10 x LSO Create Monday Club sessions per year (30 over 3 years) - creative music making workshops delivered on Mondays from 11am to 3pm at LSO St Luke's, the LSO's music education centre in Islington for 30 adults with learning disabilities and their carers.

24 x outreach workshops delivering targeted creative music making activity in day care/residential home settings per year (6 settings per year receiving a series of 4 workshops designed for their specific service users; 72 workshops over 3 years)

1 x 3-day intensive performance project per year, creating new music compositions and delivered in collaboration with Drake Music using assistive technology and live and acoustic music making, culminating in performance with full Orchestra or section of orchestra. (3 over 3 years.)

Engagement of adults with disabilities in the LSO's wider programme - 12 lunchtime concerts at LSO St Luke's per year with discussion sessions, and 3 creative workshops for adults with learning disabilities to respond to the music in the concerts. (36 concerts/9 workshops over 3 years)

Engagement of adults with disabilities in the LSO's wider programme - 3 open rehearsals per year with opportunity for adults with learning disabilities to meet the musicians before the rehearsal and sit on stage with the Orchestra. (9 over 3 years).

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Adults with learning disabilities feel more able to access and participate in high quality music making activity at LSO St Luke's and the Barbican.

LSO Create has engaged increased numbers of adults with profound and multiple learning disabilities (PMLD) in tailored and appropriate music making activity.

Participants in LSO Create are happier and have better listening skills and ability to focus.

Carers of participants on LSO Create are better able to engage adults with learning disabilities in musical activity for their enjoyment and improved sense of wellbeing.

Who will benefit?

About your beneficiaries

How many people will benefit directly from the grant per year?

500

In which Greater London borough(s) or areas of London will your beneficiaries live?

London-wide (100%)

What age group(s) will benefit?

16-24

25-44

45-64

What gender will beneficiaries be?

All

What will the ethnic grouping(s) of the beneficiaries be?

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

81-90%

Funding required for the project

What is the total cost of the proposed activity/project?

Expenditure heading	Year 1	Year 2	Year 3	Total
Artist fees (LSO musicians, amateurs and Drake Music)	20,765	20,765	20,765	62,295
Venue costs (LSO St Luke's, Barbican, stewarding, catering)	7,459	7,459	7,459	22,377
Other costs (couriers, commissions)	2,700	2,700	2,700	8,100
Contribution towards Friday Lunchtime Concert costs	978	1,398	1,957	4,333
Evaluation	1,000	2,000	2,000	5,000
Project Manager salary (40%) + 15% national insurance & pension	13,570	13,570	13,570	40,710
Inflation to staff and venue costs (3% yr 2, 6% yr 3)	0	1,437	2,907	4,344
Admin @ 5%	2,324	2,395	2,423	7,141
Contingency @ 2%	929	958	969	2,856
TOTAL:	49,725	52,681	54,749	157,155

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
TOTAL:	0	0	0	0

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
TOTAL:	0	0	0	0

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Artist fees (LSO musicians, amateurs and Drake Music)	20,765	20,765	20,765	62,295
Venue costs (LSO St Luke's, Barbican, stewarding, catering)	7,459	7,459	7,459	22,377
Other costs (couriers, commissions)	2,700	2,700	2,700	8,100

Contribution towards Friday Lunchtime Concert costs	978	1,398	1,957	4,333
Evaluation	1,000	2,000	2,000	5,000
Project Manager salary (40%) + 15% national insurance & pension	13,570	13,570	13,570	40,710
Inflation (staff/venue costs 3% yr 2, 6% yr 3)	0	1,437	2,907	4,344
Admin @ 5%	2,324	2,395	2,423	7,141
Contingency @ 2%	929	958	969	2,856
TOTAL:	49,725	52,681	54,749	157,155

Finance details

Please complete using your most recent audited or independently examined accounts.

Financial year ended:	Month: July	Year: 2013
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Income received from:	£
Voluntary income	6,965,000
Activities for generating funds	331,000
Investment income	66,000
Income from charitable activities	8,843,000
Other sources	66,000
Total Income:	16,271,000

Expenditure:	£
Charitable activities	15,350,000
Governance costs	66,000
Cost of generating funds	1,076,000
Other	0
Total Expenditure:	16,492,000
Net (deficit)/surplus:	-221,000
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	-221,000 <i>ok</i>

Asset position at year end	£
Fixed assets	1,910,000
Investments	0
Net current assets	2,536,000
Long-term liabilities	(643,000)
*Total Assets (A):	3,803,000

Reserves at year end	£
Endowment funds	0
Restricted funds	244,000
Unrestricted funds	3,559,000
*Total Reserves (B):	3,803,000

* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
21-30%

Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts:

None.

Previous funding received

Please list the funding received by your organisation from the following statutory sources during the last THREE years.

	2010 £	2011 £	2012 £
City of London (except City Bridge Trust)	2,129,000	2,016,000	2,210,000
London Local Authorities	0	0	0
London Councils	24,295	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	2,533,000	2,298,000	1,973,000

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	2010 £	2011 £	2012 £
Adam Mickiewicz Institute	0	0	99,000
Esmee Fairbairn Foundation	0	63,925	54,832
Helen Hamlyn Trust	44,073	39,868	56,130
JP Getty Jnr Charitable Trust	0	0	40,000
UBS	162,284	85,639	75,000

Declaration

I confirm that, to the best of my knowledge, all the information I have provided in this application form is correct. I fully understand that City Bridge Trust has zero tolerance towards fraud and will seek to prosecute and recover funds in every instance.

Please confirm: Yes Full Name: **Helen Michaelides**

Role within **Trusts and Foundations Coordinator**
Organisation: