



# **Trustees' Annual Report for Halifax Light Opera Society Juniors**

Charity No 1184294

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**For the period 1<sup>st</sup> April 2022 to 31<sup>st</sup> March 2023**

## **Objectives and Activities**

As an amateur dramatics society, Halifax Light Opera Society Juniors (HLOSJ) gives 8 to 18-year olds in Halifax and surrounding areas opportunities to be on stage, help backstage, improve their acting, singing and dancing skills, boost their confidence, make life-long friends and have fun. We perform an annual musical, smaller concerts and use workshops to engage and develop their capabilities and skills for them to grow as independent, mature and responsible people.

During this period, we ran our second year of our annual monologue competition in May called 'Standing in the Spotlight'. We chose a selection of Disney characters, both good and bad, for the children to pick from. Our judging panel comprised of three people who are well connected with the Society, including one of our trustees. We were pleased that the head judge returned for our second year. This was an engagement of the Trustees directly with our members. We intend to continue to run the event annually.

During the summer, we took part in the Halifax Light Opera Society 'Night with the Light' concert. We prepared a junior section to perform in the concert. This was an opportunity for our members to reconnect following our annual show and also for our Society to build on its relationship with the adult society from whom we derived many years ago. The valued supporters of the HLOS were delighted to watch the younger generation perform and our members did so with such enthusiasm. The concert was an opportunity for members to take on solo songs where they have not previously had the opportunity to do so within our annual production.

We began rehearsing for our February 2023 production of Madagascar Jr in September 2022. The show proved popular, the number of members grew as did the tickets sold. It was a fun and fresh show. It was different to anything we had done before which was in some ways a welcomed challenge for the members, the production team and technical team. It was an opportunity to be creative and the visions of all involved were certainly brought to life with vibrant costumes, intricate make-up and a colourful set designed by students at Calderdale College. We are lucky as a Society to have formed a relationship with Calderdale College who have young and aspiring creatives who are eager to create innovative sets for our productions. We intend to continue to work with them throughout the coming years.

Through all of this, the Trustees have had due regard to what the Society has been doing and how it is of public benefit to the children involved and the community it is located in.

## **Achievements and Performance**

From the society's formation, we have consistently had young members who go on to pursue professional arts careers. We were the first in the area to form a juniors age range society, and from our example other societies were set up across the country which led to the NODA listing junior societies under its umbrella. HLOSJ were one of the first junior societies accepted by NODA nationally, and have been since 1976.



One of our greatest achievements is happy and confident young people. Whether in helping them build their confidence in their school life, to pursue arts careers or enjoying a lifetime of amateur dramatics. Young people who have gained from the society have now come back and are contributing to its future.

The parents of one of our members said the following:

*My daughter was part of the cast for Madagascar with HLOSJ and had the best time. It took her out of her comfort zone not really knowing anyone but made some lovely friends and the production team were amazing. Communication was great from the beginning and the committee always thought about the little extras such as a Christmas party and an after party. Hopefully Chloe will be successful in auditioning for future productions.*

## **Financial Review**

The charity's financial position at the end of the period is positive.

For the purposes of the profitability of Madagascar Jr alone, although this is not reflected in the CC16a, this was £6,459.63. The income from the show was received in the following financial year (April 2023) however was related to the production that took place within the period April 2022-March 2023. This will ensure we can continue to run the society and continue to serve our local community of children and young people who are passionate about the arts.

As a result of the timing of the income from our 2023 main production Madagascar Jr, it is apparent at first glance on the CC16a, the difference in income and outgoings shows is -£11,767 however, with a large income from ticket sales to follow and with £3,842 remaining in the main charity account, the Society continues to be in positive funds.

After a number of years of being unable to use the monies awarded to the Society by the Calderdale Small Grants Scheme, due to Covid-19, we were able to off-set the grant towards the costs of taking part in the Halifax Light Opera Society Concert. We made a profit of £1811.59 from the 'Night with the Light' Concert, as the outgoings of £1,120 were met by the Calderdale Small Grant we received.

Our reserves ensure we have sufficient funds at our disposal to offset any unforeseen circumstances in which a show cannot take place but if payments still have to be made in relation to that show despite not having the income, this is our safety net. We set a minimum amount to cover the projected budget for the year to protect any necessary expenditure and we keep sufficient reserves in a separate deposit account from our running account for productions, to ensure all payments are covered in the event of shows not being able to be undertaken.

We are confident that the society is in a strong position, and we aim to maintain this and continue to produce annual shows that return a profit that can then be used for other activities and initiatives for our members. We look forward to our next production and keeping members engaged.

## **Structure, Governance and Management**

HLOSJ is governed by a Foundation Model Constitution as a Charitable Incorporated Organisation. In our Trustee selection methods we refer to the charity's own guidance with regard to additional Trustees.

## **Reference and Administrative detail**



Charity Name: Halifax Light Opera Society Juniors

Other name the charity uses: HLOSJ, HLOS Juniors

Registered Charity number: 1184294

Charity's principal address: 1 Bankfield Grange, Greetland, Halifax, HX4 8LJ

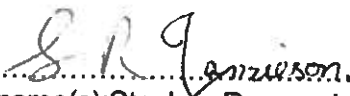
Names of the charity trustees who manage the charity:

| TRUSTEE NAME                    | OFFICE           | DATES ACTED IF NOT FOR A WHOLE YEAR |
|---------------------------------|------------------|-------------------------------------|
| Anthony John Francis Longbottom | <del>Chair</del> | 08/07/2019 – 31/03/2023             |
| Margaret Lois Swales            |                  | 08/07/2019 – 31/03/2023             |
| Stephen Raynor Jamieson         | Chair            | 08/07/2019 – 31/03/2023             |
| Marilyn Mitchell                |                  | 08/07/2020 – 31/03/2023             |

### Declarations

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

Signed by the Chair

  
Full name(s): Stephen Raynor Jamieson

Date: 29th January 2024.

Signed on behalf of the charity's Trustees

  
Full name(s): Kate Machon

Position: CIO Secretary

Date: 29th January 2024



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Charity Name  
Halifax Light Opera Society Juniors

No (if any)  
1184294

CC16a

## Receipts and payments accounts

|                        |                                 |    |                               |
|------------------------|---------------------------------|----|-------------------------------|
| For the period<br>from | Period start date<br>01/04/2022 | To | Period end date<br>31/03/2023 |
|------------------------|---------------------------------|----|-------------------------------|

### Section A Receipts and payments

|                                                       | Unrestricted<br>funds<br>to the nearest £ | Restricted<br>funds<br>to the nearest £ | Endowment<br>funds<br>to the nearest £ | Total funds<br>to the nearest £ | Last year<br>to the nearest £ |
|-------------------------------------------------------|-------------------------------------------|-----------------------------------------|----------------------------------------|---------------------------------|-------------------------------|
| <b>A1 Receipts</b>                                    |                                           |                                         |                                        |                                 |                               |
| Subscriptions                                         | 3,380                                     | -                                       | -                                      | 3,380                           | -                             |
| Clothing Merchandise                                  | 372                                       | -                                       | -                                      | 372                             | -                             |
| Ticket Sales                                          | 689                                       | -                                       | -                                      | 689                             | -                             |
| Programme & Raffle                                    | 440                                       | -                                       | -                                      | 440                             | -                             |
| Donations                                             | 275                                       | -                                       | -                                      | 275                             | -                             |
| Costume Fefund                                        | 220                                       | -                                       | -                                      | 220                             | -                             |
| Miscellaneous                                         | 95                                        | -                                       | -                                      | 95                              | -                             |
| <b>Sub total (Gross income for AR)</b>                | <b>5,471</b>                              | <b>-</b>                                | <b>-</b>                               | <b>5,471</b>                    | <b>-</b>                      |
| <b>A2 Asset and investment sales, (see table).</b>    |                                           |                                         |                                        |                                 |                               |
|                                                       | -                                         | -                                       | -                                      | -                               | -                             |
|                                                       | -                                         | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b>                                      | <b>-</b>                                  | <b>-</b>                                | <b>-</b>                               | <b>-</b>                        | <b>-</b>                      |
| <b>Total receipts</b>                                 | <b>5,471</b>                              | <b>-</b>                                | <b>-</b>                               | <b>5,471</b>                    | <b>-</b>                      |
| <b>A3 Payments</b>                                    |                                           |                                         |                                        |                                 |                               |
| Rehearsal Space                                       | 2,375                                     | -                                       | -                                      | 2,375                           | -                             |
| Costumes                                              | 827                                       | -                                       | -                                      | 827                             | -                             |
| Set                                                   | 1,337                                     | -                                       | -                                      | 1,337                           | -                             |
| Lighting                                              | 1,304                                     | -                                       | -                                      | 1,304                           | -                             |
| Sound                                                 | 2,300                                     | -                                       | -                                      | 2,300                           | -                             |
| Make Up                                               | 57                                        | -                                       | -                                      | 57                              | -                             |
| Rights for Show/Royalties/Logo                        | 5,460                                     | -                                       | -                                      | 5,460                           | -                             |
| Insurance                                             | 406                                       | -                                       | -                                      | 406                             | -                             |
| Production Team                                       | 1,251                                     | -                                       | -                                      | 1,251                           | -                             |
| Marketing                                             | 629                                       | -                                       | -                                      | 629                             | -                             |
| Programme & Raffle                                    | 500                                       | -                                       | -                                      | 500                             | -                             |
| Clothing Merchandise                                  | 453                                       | -                                       | -                                      | 453                             | -                             |
| Miscellaneous                                         | 340                                       | -                                       | -                                      | 340                             | -                             |
| <b>Sub total</b>                                      | <b>17,238</b>                             | <b>-</b>                                | <b>-</b>                               | <b>17,238</b>                   | <b>-</b>                      |
| <b>A4 Asset and investment purchases. (see table)</b> |                                           |                                         |                                        |                                 |                               |
|                                                       | -                                         | -                                       | -                                      | -                               | -                             |
|                                                       | -                                         | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b>                                      | <b>-</b>                                  | <b>-</b>                                | <b>-</b>                               | <b>-</b>                        | <b>-</b>                      |
| <b>Total payments</b>                                 | <b>17,238</b>                             | <b>-</b>                                | <b>-</b>                               | <b>17,238</b>                   | <b>-</b>                      |
| <b>Net of receipts/(payments)</b>                     | <b>- 11,767</b>                           | <b>-</b>                                | <b>-</b>                               | <b>- 11,767</b>                 | <b>-</b>                      |
| <b>A5 Transfers between funds</b>                     | <b>-</b>                                  | <b>-</b>                                | <b>-</b>                               | <b>-</b>                        | <b>-</b>                      |
| <b>A6 Cash funds last year end</b>                    | <b>-</b>                                  | <b>-</b>                                | <b>-</b>                               | <b>-</b>                        | <b>-</b>                      |
| <b>Cash funds this year end</b>                       | <b>- 11,767</b>                           | <b>-</b>                                | <b>-</b>                               | <b>- 11,767</b>                 | <b>-</b>                      |

## Section B Statement of assets and liabilities at the end of the period

| Categories                                                  | Details                                                | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>to nearest £ |
|-------------------------------------------------------------|--------------------------------------------------------|------------------------------------|----------------------------------|---------------------------------|
| <b>B1 Cash funds</b>                                        | HSBC Account                                           | 3,842                              | -                                | -                               |
|                                                             | Barclays Account                                       | 8,943                              | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             | <b>Total cash funds</b>                                | <b>12,785</b>                      | <b>-</b>                         | <b>-</b>                        |
|                                                             | (agree balances with receipts and payments account(s)) | Agreement Error                    | OK                               | OK                              |
| <b>B2 Other monetary assets</b>                             | Details                                                | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>to nearest £ |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
| <b>B3 Investment assets</b>                                 | Details                                                | Fund to which asset belongs        | Cost (optional)                  | Current value (optional)        |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
| <b>B4 Assets retained for the charity's own use</b>         | Details                                                | Fund to which asset belongs        | Cost (optional)                  | Current value (optional)        |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
| <b>B5 Liabilities</b>                                       | Details                                                | Fund to which liability relates    | Amount due (optional)            | When due (optional)             |
|                                                             |                                                        |                                    | -                                |                                 |
|                                                             |                                                        |                                    | -                                |                                 |
|                                                             |                                                        |                                    | -                                |                                 |
|                                                             |                                                        |                                    | -                                |                                 |
|                                                             |                                                        |                                    | -                                |                                 |
| Signed by one or two trustees on behalf of all the trustees | Signature                                              | Print Name                         | Date of approval                 |                                 |
|                                                             |                                                        |                                    |                                  |                                 |