

**REFERENCE AND ADMINISTRATIVE DETAILS OF THE OXFORD OPERA TRUST CIO,
ITS TRUSTEES AND ADVISERS FOR THE YEAR ENDED 30 JUNE 2025**

Oxford Opera Trust CIO trading as Oxford Opera and Oxford Opera Company

Charity registered number 1193079

Registered office

Suite 1, 268 Belsize Road,
London,
NW6 4BT

Trustees

Dr C Coetzee, Trustee
S A Walsh, Trustee and Treasurer, June 2025
R Lee MA MSc, Trustee
C A Ryan FCA BFP, Trustee and Chairman
S Wagner, Trustee
Paul Anderson-Walsh, Trustee, appointed August 2025
Anna Stamp, Trustee, appointed August 2025
Anna Disley-Simpson, Trustee, appointed August 2025

Accountants

SPX Oxford Ltd
Peace House,
Paradise Street,
Oxford
OX1 1LD

Oxford Opera Trust CIO Annual Report
Charity Number: 1193079
Reporting Period: 1st July 2024 – 30th June 2025

1. Introduction

The Trustees present their annual report together with the receipts and payments accounts of the Oxford Opera Trust CIO for the period 1st July 2024 to 30th June 2025. This report outlines the charity's activities, achievements, and future plans, and has been prepared in accordance with the Charities Act 2011.

2. Objectives and Activities

a. Charitable Objectives

The main objectives of the charity are:

- To promote public operatic performances.
- To foster musical education in young people through youth programmes and outreach.

In setting objectives and planning activities, the Trustees have given due consideration to the Charity Commission's guidance on public benefit, particularly "Public benefit: running a charity (PB2)".

b. Activities Undertaken

Oxford Opera has pursued its charitable objectives through:

- Public performances of operatic works.
- Expanding our Education and Outreach department, offering creative workshops in schools and public venues.
- Collaborations with local institutions to make opera more accessible.

3. Achievements and Performance

a. Review of Activities – Period 1st July 2024 to 30th June 2025

Ambassadors Recital - 14th November 2024 - Levine Building, Trinity College.

Hosted by President Hilary Boulding as part of their "Music at Trinity Programme".

Oxford Opera Company Ambassador, soprano Rachel Nicholls, presented a wonderful and varied programme of song. Accompanied by internationally acclaimed pianist Iain Burnside, this concert also featured Stuart Pendred singing some Finzi in an event that was open to the public.

Main Production – TOSCA at the Oxford Playhouse Theatre - March 2025

Returning to the Oxford Playhouse Theatre, our headline production for 2025 was Puccini's *Tosca* on 28th and 29th March. It was directed by Katie Blackwell with the Oxford Opera Orchestra under the baton of Music Director John Warner.

Continuing our commitment to the creation of opportunities for younger UK-based, professional artists to continue to develop their careers as they make debuts in larger roles within the operatic canon both Samoan-New Zealand soprano Marlena Devoe and English tenor Sam Furness made stunning role debuts as Tosca and Cavaradossi respectively. Working together for the first time since their role debuts in our 2020

production of *La Bohème* we, as a company, are extremely proud to have played a major part in their respective career development through our productions.

We created more opportunities for female voices in our production through the casting of mezzo sopranos for the roles of the Sacristan and the Jailor. These are roles that would normally be sung by a baritone.

Our production featured a youth chorus of 40 young people from across the county, and a small Community Chorus. The Youth Chorus all sang the “Shepherd Aria”, a song that would normally be sung by one boy soprano. Our commitment to creating opportunity for more young people to this art form remains undiminished.

The production was sold out and critically acclaimed.

Due to the subject of the opera, it wasn’t appropriate for us to produce our usual family matinee version of the opera. We will, however, be reintroducing this in our 2026 production of Mozart’s *Marriage of Figaro* and are very much looking forward to giving our cover cast an opportunity to sing parts of the roles they are covering, giving them all much needed experience, whilst also continuing our commitment to creating opportunity to experience this incredible art form at the earliest opportunity for our young, more family-focused audience.

Patrons Recital - 7th June 2025

The recital was hosted by Michael de Navarro at his property in Broadway, Gloucestershire as a fundraiser towards the ongoing Education and Outreach work of Oxford Opera

Patrons Susan Bullock CBE and Richard Berkeley-Steele presented a wonderful programme of song. Accompanied by Oxford Opera Music Director John Warner, this concert also featured Stuart Pendred singing as part of the programme. The event raised over £6000.

Oxford Opera Company has continued to champion, advocate for and promote Oxford Opera Trust as we have built relationships within the city’s cultural sector and beyond including partnerships with:

The Atlantic Fellows, where we have been invited to develop and platform a new opera called *Aliceheimers*

Sholto Kynoch, Oxford International Song Festival – with whom we are looking to collaborate on a project

John Savournin, new CEO & Artistic Director of Waterperry Festival with whom we are looking to collaborate on a Youth/Kids Go Classical project in 2027

John Fulljames and team at the Schwarzman Centre for the Humanities with whom we are in ongoing communication to keep them aware of our activities

Mike Tweddle - Artistic Director of the Playhouse Theatre – with whom we are engaged in ongoing discussions as we plan our next production

Layla Moran MP for Oxford West and Abingdon

Paula Redway, Oxford City Council, Oxford Cultural Partnership

Chris Stockwell at CATS, Cotswolds Arts Through Schools

Councillor Susanna Pressel, Oxford City Council, Oxfordshire County Council

British Youth Opera, by whom we have been invited to attend and give feedback/advice at a private recital programme.

The Business of Opera Conference - The Laidlaw Foundation

Education & Outreach Department

Under the leadership of our Education Manager, Catie Simpson, the department has flourished. This year we have continued to build upon the success of our previous 5 years of development. We have added new workshops in order to engage with as many individuals as possible. These include: *Stories and Songs*, a new workshop for early years children and their parents to attend together. We have held two days of sessions, with 3 each day at the Museum of Oxford (MOX). We launched CPD courses in October 2024 at Kingham Lodge. These were kindly arranged and funded by CATS, with whom we have developed a close working partnership. *There's a Storm a Brewin'* is an exciting new workshop launched at MOX and now being offered to schools. It looks at how storms and the weather are used in opera and other theatrical performances as a tool and covers Mozart, Britten, Shakespeare, Byron, body percussion and has an arts and crafts session.

New Collaborations

We have developed a new relationship with Cotswold Arts Through Schools, (CATS) who support Artists and Arts Organisations to provide schools in their area with workshops and projects, and to help support and develop Arts teaching in schools. They have supported us visiting 6 different schools since last April. In this calendar year alone we have seen 606 children in schools workshops through their funding. They hosted our first CPD sessions at Kingham Lodge and invited and funded the teachers who attended. We are visiting more of their schools in the coming months and will continue to work with them to develop further opportunities for the children of Oxfordshire. We have developed a close relationship with The Old Fire Station where we host our weekly Youth Company sessions. We have also developed a relationship with ArkT, for whom we are going to be providing workshops, and will continue to discuss other opportunities with them.

Engagement Headlines Since Last Report

2,014 children have participated in our workshops or events

36 adults have participated in workshops with their children

teachers from over 20 schools joined us at our first CPD courses.

We have visited 11 different schools, one of them 4 times

Ongoing Relationships and Developments

We have continued to work with the Museum of Oxford (MOX) and have visited 3 times over the last year. We are talking to them about other workshops and opportunities going forward. We worked again with New College Oxford and Oxford High School for Girls. They provided choirs of 13 children each, to join our Youth Company in our production of *Tosca* at The Oxford Playhouse. This means that 39 children from across Oxfordshire had a unique opportunity to perform on stage with professional singers. We continue to work with a very talented team of facilitators and are constantly adding to the team to ensure the best experience for all the participants involved. We are planning to run a week long summer school for those interested in exploring opera further.

b. Fundraising Activities

Funding for Oxford Opera Trust CIO came from:

- Private donations (including a significant gift that secured the charity's short-to-medium term plans).
- Ticket sales.
- Grants from charitable foundations and Oxford City Council.

The Trustees have prioritised diversification of income streams. Current efforts focus on:

- Developing new supporter relationships.
- Securing new grant funding and corporate partnerships.
- Strengthening engagement with our loyal local audience base.

The Trustees are grateful to all donors and supporters, including those who have contributed significantly this year.

Oxford Opera Trust CIO continues to champion its identity as “a company for the City, with the City at its Heart—producing world-class opera, with accessibility and opportunity for all”.

4. Financial Review

a. Going Concern

The Trustees are pleased to report that, as predicted in the 2022–2023 report and the 2023–2024 report, the charity's financial footing has stabilised. Income exceeded expenditure during this period, enabling ambitious planning for future projects, including mainstage productions and education initiatives.

The Trustees are satisfied that the charity remains a going concern and will continue to adopt this basis for the preparation of financial statements.

Further detail on the financial position is provided in the accompanying accounts.

5. The Board

During the period, one new Trustee was appointed to the Board. No other changes occurred in the composition of the Board.

The Board agreed that minutes would be taken by the newly appointed Trustee and shared with the Executive Director and Chair for approval.

In January 2026, a new Chair was elected. The outgoing Chair, Cliff Ryan, who wrote to express his immense gratitude for the opportunity to have served as Chair over the past five years and for the support of his fellow Trustees. With the appointment of new Trustees, he believed this to be the right moment to hand on the role.

Paul Anderson-Walsh was elected as the new Chair and Cliff Ryan remains on as Trustee. Two additional Trustees were appointed in August 2026: Anna Stamp and Anna Disley-Simpson.

Incoming Chair's Statement

As the newly appointed Chair, I am pleased to present this report at an important point in the organisation's development.

Oxford Opera Company continues to deliver work of high artistic quality and community value, supported by a committed Board and Executive team. At the same time, the Trustees recognise the need to transition from a reactive, project-led model to a more structured and sustainable operating framework.

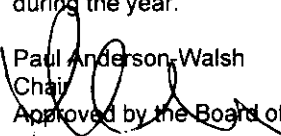
A key priority has been to clarify purpose. While opera remains our artistic medium, our broader aim is to enable access, participation, and belonging through that work. This clarity strengthens our approach to partnerships, fundraising, and audience development.

Following a strategic review, the Board is moving toward a more sustainable multi-year programme model, balancing large-scale productions with smaller-scale and community-focused activity. This will reduce operational pressure, improve financial planning, and support long-term resilience.

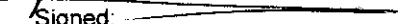
Alongside this, the Trustees are prioritising improved planning, financial sustainability, and appropriate resourcing structures.

The year ahead will focus on consolidating these foundations while continuing to deliver high-quality artistic work and meaningful public engagement.

On behalf of the Board, I thank all those who have contributed to the charity's work during the year.


Paul Anderson Walsh
Chair

Approved by the Board of Trustees on 24th April 2026


Signed: _____
Paul Anderson Walsh, Chair of Trustees



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
Oxford Opera Trust CIO

No (if any)
1193079

Receipts and payments accounts

CC16a

For the period	Period start date	To	Period end date
from	01/07/2024		30/06/2025

Section A Receipts and payments

Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £

A1 Receipts

Donations - grant	-	-	-	1,300
Donations - individual	51,284	-	51,284	80,485
Donations - corporate	-	-	-	-
Gift Aid	11,793	-	11,793	35,000
Box office sales	23,414	-	23,414	9,784
Education and outreach	12,143	-	12,143	8,175
Other events	-	-	-	-
Other income	578	-	578	-
Fundraising	4,598	-	4,598	2,981
Interest	628	-	628	441
	-	-	-	-

Sub total (Gross income for AR)

104,438	-	-	104,438	138,166
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A2 Asset and investment sales, (see table).

	-	-	-	-
	-	-	-	-
Sub total	-	-	-	-
Total receipts	104,438	-	-	104,438
				138,166

A3 Payments

Project costs	101,351	-	-	101,351	64,053
Admin Team	26,286	-	-	26,286	27,088
Education/Outreach	26,328	-	-	26,328	16,719
Consultancy/Professional fees	420	-	-	420	4,425
Office costs	2,252	-	-	2,252	2,689
Marketing Education	-	-	-	-	1,370
Marketing	4,140	-	-	4,140	1,200
Insurance	921	-	-	921	684
Raising funds	1,562	-	-	1,562	-
Sub total	163,260	-	-	163,260	118,228

A4 Asset and investment purchases, (see table)

	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	163,260	-	-	163,260	118,228

Net of receipts/(payments)

A5 Transfers between funds	-	58,822	-	-	19,938
A6 Cash funds last year end	-	-	-	-	-
		96,377		-	76,439
Cash funds this year end	37,555	-	-	37,555	96,377

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	Bank account - current	11,883	-	-

B1 Cash funds

Bank account - deposit		25,672	-	-
		-	-	-
Total cash funds		37,555	-	-
(agree balances with receipts and payments account(s))				

B2 Other monetary assets

Details	Unrestricted funds	Restricted funds	Endowment funds
	to nearest £	to nearest £	to nearest £
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

B4 Assets retained for the charity's own use

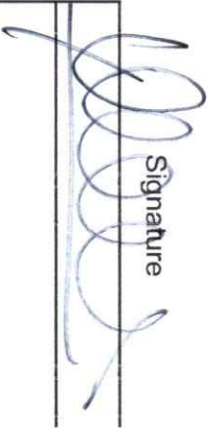
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

Details

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
		-	
		-	
		-	
		-	
		-	

B5 Liabilities

Signed by one or two trustees on behalf of all the trustees



Signature

Print Name

PAUL ANDERSON-WRIGHT

Date of approval

27/04/17



Section A

Independent Examiner's Report

Report to the trustees/
members of

Oxford Opera Trust CIO

On accounts for the
period

1 July 2024 to 30 June 2025

Charity no
(if any)

1193079

Set out on pages

1-4 of Receipts and Payments accounts

Respective
responsibilities of
trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of independent
examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent
examiner's statement

In connection with my examination, no material matters have come to my attention (other than that disclosed below *) which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Charities Act or
- the accounts do not accord with the accounting records

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

** Please delete the words in the brackets if they do not apply.*

Signed:

Sheila Parry

Date:

27th April 2026

Name:

Sheila Parry

Relevant professional
qualification(s) or body
(if any):

FCCA

Address:	Peace House, Paradise Street, Oxford OX1 1LD

Section B	Disclosure
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Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

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