

persona arts | ...

A Charitable Incorporated Organisation (CIO)  
Report and Financial Statements  
Year Ending 31 March 2024

— Charity No: 1197297 —

## Persona Arts

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## Reference and Administrative Details

Charity Number: 1197297  
 Correspondence Address: Birmingham Voluntary Service Council, Latham House, 33-34 Paradise Street, Birmingham, B1 2AJ  
 Charity Form: Charitable Incorporated Organisation (CIO), Foundation Model  
 Registered with: The Charity Commission of England and Wales  
 Companies House Number: CE027781

Bankers: NatWest Bank, PO BOX NO2, St James Street, Accrington, Lancashire, BB5 1LY

Independent Examiner: Deidre A H Mattison MA ACA, 22 April Croft, Moseley, Birmingham, B13 9HP

## First Charity Trustees

Rosemary Rowley (Chair) resigned 1 September 2023

Toni Perry-Thomas (Secretary)

Andrew Simpson (Treasurer) resigned 31 March 2024

Byron Jackson FRSA (Artistic Director)

James Oldham

## Trustees

Julia Handelman-Smith FRSA appointed 1 February 2024

## Patron

Revd Canon Eve Pitts

With the exception of Rosemary Rowley, the first charity trustees were appointed at the time of incorporation on 29 October 2021. Trustee Julia Handelman-Smith was appointed 1 February 2024.

Two of our trustees are BME and two are acknowledged as disabled, supporting our mission to increase inclusion within the opera arts and classical music industry.

## Contacting Persona Arts

Persona Arts can be contacted through the email address: [info@personaarts.org.uk](mailto:info@personaarts.org.uk) and number 07599 170762. More information about Persona Arts can be found on our web site: [www.personaarts.org.uk](http://www.personaarts.org.uk)

## Structure, Governance and Management

Persona Arts is governed by its constitution, which is available for download from the Charity Commission web site.

## Appointment of Trustees

Apart from the first charity trustees, every trustee will be appointed by a resolution passed at a properly convened meeting of the charity trustees (the board). In selecting individuals for appointment as charity trustees, the board has considered the skills, knowledge and experience needed for the effective administration of the CIO.

## Persona Arts

Report of the Trustees for the year ending 31 March 2024

The Trustees of Persona Arts are pleased to present their annual report, together with the financial statements of the charity for the year ending 31 March 2024, which have been prepared under the accrual basis method. This report and the accompanying accounts have been prepared to meet the requirements of the Charity Commission.

Persona Arts was incorporated as a Charitable Incorporated Organisation based on the Foundation Model on 29 October 2021 and is registered with the Charity Commission of England and Wales, registration number 1197297 obtained 29 December 2021. This annual report covers the financial year, 1 April 2023 to 31 March 2024, a period of 12 months.

## Artistic Director's Report



As the Founder and Artistic Director of Persona Arts, I took great pride in assembling a team of volunteer trustees, laying the essential foundation for this much needed opera company and charity. By using my professional networks and engaging with potential contacts, I ensured that these trustees possess the necessary skills and insights to govern Persona Arts effectively. This undertaking was amidst the challenges of the final year of the pandemic when Persona Arts was born.

Over the past two years (2022-24), I have assumed multiple roles in establishing a functional organisation run by volunteer trustees. Even with the current economic challenges and a brand new opera profile within the Arts, we have successfully forged partnerships with local, regional, and national arts organisations, as well as esteemed community leaders, enhancing our presence in local communities. While recognising the huge difficulties in the post-pandemic opera arts ecology and music education in the West Midlands, I remain confident in our ability to succeed.

The Dutchman project 2022-2024 has been the all-consuming focus of our recent activities. Despite being our very small charity's first and highly ambitious project, I have tirelessly raised over £100,000 for the success of this project. This was from a ground zero financial model. Securing recent funding with Arts Council England has allowed us to fully realise the project's aims. This huge undertaking required significant input from myself as the Artistic Director, and I extend gratitude to our dedicated team of trustees and the excellent skills of our project manager in getting the project to this stage. The Flying Dutchman is a very ambitious opera work, but our aim is to produce BME-led performances of the highest possible calibre, in collaboration with our local communities.

I am deeply committed and determined to address the ongoing need to give a credible platform that allows underrepresented as well as homegrown ethnically diverse artists to shine in mainstream repertoire. They deserve the opportunity to showcase their talents, a prospect often overlooked by other UK opera companies and arts organisations. It has endured for far too long and the meaningful changes much too slow. If the opera and choral arts are to survive, it must adapt whilst maintaining excellence in quality and in accessible training opportunities. We will endeavour to work and engage with the communities we represent and/or have been systemically forgotten about to access opera. I appreciate this will take time.

However, I am excited in navigating the challenges and celebrating the successes of the Dutchman project's next stages, while continuing to build on the positive momentum we have achieved at Persona Arts.

**Byron Jackson FRSA**  
**Founder and Artistic Director**

## 1. Objects, Organisation and Activities

Our objects are: ***“To advance public education in and appreciation of the arts, in particular the arts of opera, choral and classical music, in the communities of the West Midlands authorities, Birmingham, Coventry, Dudley, Sandwell, Solihull, Walsall and Wolverhampton by promoting engagement with said arts for all members of the community through the staging of performances, musical activities and presentations”***

The purpose of Persona Arts is to advance the public education and appreciation of the opera, choral and classical music arts in the communities of the West Midlands. This will be achieved by promoting engagement with said arts for all through the staging of opera performances, concerts and recitals, workshops and activities whether live, digital or streaming.

Being an artistically BME-led organisation, Persona Arts is committed to providing opportunities for singers, musicians, orchestras and the underrepresented to perform and develop their craft in a supportive and educational environment.

Persona Arts strives to showcase the wealth of urban and community talent to the highest level and to champion diversity, equity and inclusion for children, young people and adults.

The trustees confirm that they have regard of the Charity Commission’s guidance to implement plans and activities to promote the opera and choral arts; increasing access, participation and engagement to new audiences not previously reached or who are notoriously arts deprived and underrepresented.

### 2.1. Review of Activities

The founder and Artistic Director Byron Jackson continued to work tirelessly for and on behalf of Persona Arts in developing the activities for the last year and increasing the profile of the charity. This has been to support our long term project, the Flying Dutchman.

#### ***The Flying Dutchman (Der fliegende Holländer) 2022-24***

Over this last year, Byron has secured partnerships with 23 local community leaders and prestigious arts organisations. He has forged a sound infrastructure and has confirmed the required artists and creatives for the project.

### 2.2. Learning and Participation Programme: Dutchman Choruses Workshop - July 2023

On 22 July 2023, we hosted our third "Come and Sing" Dutchman Chorus workshop at St. Anne’s Church in Moseley, Birmingham. 35 participants, a mix of Birmingham Choral Union members and volunteers from local communities, joined us, achieving 70% of our target attendance. Feedback was overwhelmingly positive, with Colin Baines leading and Darren Hogg accompanying, guiding participants through the chorus material with musical and linguistic fluency. We welcomed new singers, notably boosting our tenor and bass sections and now have a suitable amount of choristers for the performances, including BME chorus mentors. Many participants will experience their first foreign language choral work or opera performances, as reflected in their feedback. To aid learning, we provided resources and recordings for home practice before the workshop. Queries had been made from a number of singers who were unable to attend but were keen to sign up for the project and performances in July 2024. Box Office for the performances has been on sale since January 2024.

#### **Participant feedback:**

- *“Enjoyable workshop due to excellent conductor and accompanist”*
- *“Look very careful at the music, listening to the recordings”*
- *“How the voices combine”*
- *“How the music sounds and the parts fit together”*

Byron and Richard created recruitment brochures to attract more volunteer singers for the chorus. It was decided to disband the terminology of men and women due a couple of new recruits defining themselves as non-binary. It was also decided that to address diversity, professional ethnically diverse choristers would be hired for the project.



*Dutchman Community Chorus Workshop 2023*



*Dutchman Community Chorus Workshop 2023*

### 2.3. Online activities and participation: What you think about opera? Quiz

Our inaugural general knowledge opera quiz online, was available on our website from 20 February 2023, to 23 June 2023. The goal was to ignite interest, educate, and foster a deeper understanding of opera among new audiences and our subscribers. We welcomed 27 participants from the West Midlands and beyond. Of these, 26% hailed from ethnically diverse backgrounds, indicating the ongoing need to engage underrepresented communities and encourage their participation in opera and related activities.

## 3. Staff and Volunteers

The regular administrative duties of Persona Arts are mainly facilitated by the board on a pro-bono basis. This also included Byron Jackson's role as Artistic Director to the year ending 31 March 2024. Persona Arts continues to hire the services of Richard Clover to oversee the web site, data and IT infrastructure on a subscription basis. Volunteering had been taken by the trustees Rosemary Rowley and James Oldham as Chorus Workshop Assistants for the Dutchman project. Rosemary was also our designated Safeguarding Officer until her resignation as chair and trustee. Andrew Simpson will be appointed our Finance Officer on a pro-bono basis due to stepping down as Treasurer and trustee at the end of this financial year, he will continue to diligently monitor and regulate the financial structures for the Dutchman project, on behalf of the board. As the Dutchman project continues to develop and grow, Eleni Kyriacou was contracted as the project manager on 18 September 2023 for the next major phase. The trustees were assured of her high degree of skills in managing large and complex projects as well as her extensive experience in arts administration. As a result, access costs were applied and granted from the Arts Council to support Byron's work as a disabled practitioner and the project management costs ahead. Prior to Eleni's appointment, James Oldham assisted in helping manage the project. The trustees have agreed that he will be compensated once we have secured funds from Theatre Tax Relief or other viable sources in the next financial year.

## 4. Membership

The board had agreed that the trustee membership continues to be £5 per annum and the general membership is open to any persons over the age of 16 or younger with parental consent at £3 per month. In accordance to the governing document, general members possess no voting rights, however the board had agreed that such members are permitted to attend our annual general meetings if they so wish.

## 5. Policy of Fundraising

Persona Arts is registered with the Fundraising Regulator. All funds accrued from grant making are used for the purposes of furthering the objectives of Persona Arts and its activities.

## 6. General Policies and Insurances

As Persona Arts will be working with children, young people and schools in the future, a safeguarding policy has been created and can be found on our web site.

Persona Arts is subscribed to Making Music. As a consequence, the charity is covered for Public Liability Insurance, Trustee Indemnity Insurance, Employer's Liability, Cancellation and Abandonment and Money. Persona Arts is committed to diversity, equity and inclusion and have our own equality statement and policy in place which can be found on our web site.

## 7. Examination of Accounts

Deidre Mattison is appointed as the CIO's Independent Examiner, an accountant accredited with the Institute of Chartered Accountants in England and Wales. As such, the board believes she has the necessary skills and requirements to complete an examination of the organisation's accounts in accordance with the Charities Act 2011.

## 8. Statement of the charities policy on reserves

As Persona Arts currently works on a project-by-project basis model, there is no official reserves policy for the CIO. However, profits made from ticket sales and donations are kept in reserve for future projects or for a particular project assigned. This is in the hope of building a more substantial reserve in the future as we continue to grow, at which point, policy documents will be amended to include an official reserves policy. All reserves are used for the furtherance of the CIO and its activities.

## 9. Winding up or dissolution of the charity

If upon winding up or dissolution of the charity any assets remain after the satisfaction of all debts and liabilities, the assets and unrestricted reserves shall be transferred to some other charitable body or bodies having similar objects to the charity. It is also agreed that any unspent restricted reserves from grant making trust(s) or foundation(s) will be refunded back to the respective donor.

### 10.1. Financial Review

At the end of our financial year 31 March 2024 our income continued to be mainly accumulated for our long-term project The Flying Dutchman 2022-24 and its activities. The Artistic Director continued to fundraise a further **£20,650 from trusts and foundations** which is secured in the CIO's bank account. The Dutchman chorus workshop in July 2023 drew a total of £63 in ticket sales. The tickets were kept at a very low price to attract new participants. We also received two payments from Arts Council England as part of our £56,000 award.

### 10.1. Principal Funding Sources

The principal funding sources for Persona Arts are currently by way of grants, donations, membership fees and ticket sales.

- Note – the below table splits into calendar year, however all are included in the FY23/24 accounting year (1<sup>st</sup> Mar 23 to 31<sup>st</sup> Mar 24).

This financial year (ending 31 March 2024), the company were very grateful to receive support from the following:

<b><u>Trusts and Foundations (£)</u></b>	<b><u>2023</u></b>	<b><u>2024</u></b>	<b><u>Total FY</u></b>
The Lord Austin Trust	-	1,000	1,000
The Belacqua Trust	1,500	-	1,500
The David and Sandra Burbidge Charitable Trust	-	1,000	1,000
The John Booth Charitable Foundation	1,000	-	1,000
JCH Feeney	1,500	-	1,500
Dumbreck Charity	500	-	500
The Grimmitt Trust	800	-	800
G J W Turner Trust	1,000	-	1,000
Nicholas and Judith Goodison's Charitable Settlement	800	-	800
The S & D Lloyd Charity	-	350	350
The Mary Kinross Charitable Trust	1,500	-	1,500
The Measures Trust	1,500	-	1,500
The Owen Family Trust	200	-	200
The Patrick Trust	-	500	500
The George Perkins Charitable Trust	1,000	-	1,000
Postcode Lottery	500	-	500
The Postlethwaite Music Foundation	-	1,000	1,000
The Clive Richards Foundation	1,000	-	1,000
The Eric W Vincent Trust Fund	500	-	500
The Wavendon Foundation	2,000	-	2,000
The W.E.D Charitable Trust	500	-	500
The HDH Wills 1965 Charitable Trust	1,000	-	1,000
<b>Total Trusts and Foundations Income</b>	<b>16,800</b>	<b>3,850</b>	<b>20,650</b>

<b><u>Arts Council Funding</u></b>	<b><u>2023</u></b>	<b><u>2024</u></b>	<b><u>Total FY</u></b>
Arts Council England: National Lottery Project Grants	28,000	22,400	50,400
Arts Council England: Access Costs	-	7,350	7,350
<b>Total Arts Council Funding</b>	<b>28,000</b>	<b>29,750</b>	<b>57,750</b>

<b><u>Other Income</u></b>	<b><u>2023</u></b>	<b><u>2024</u></b>	<b><u>Total FY</u></b>
Ticket Sales	63	-	63
General Membership Fees 2023-24	101	29	129
Trustee Membership Fees 2023-24	20	5	25
General Donations	5	110	115
Other Income	-	346	346
<b>Total Other Income</b>	<b>189</b>	<b>489</b>	<b>678</b>

<b>Total Income for the Year</b>	<b>44,989</b>	<b>34,089</b>	<b>79,078</b>
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**TOTAL Restricted Reserves accrued 23-24: £88,545**

**TOTAL Unrestricted Reserves accrued 23-24: £1,309**

**(TOTAL Cashflow in Persona Arts bank account = £89,115 of which £88,109 is restricted reserves)**



## 10.2. Investment Assets

The charity holds no investment assets at the balance sheet date.

## 10.3. Tangible Assets

The charity holds a company mobile phone as an asset at £56.

## 10.4. Gift Aid

The charity has registered with HMRC for the purposes of Gift Aid. Persona Arts Gift Aid reference is ZD28206.

## 10.5. Trustee Payments

Byron Jackson received a total of £262.01 for the purpose of reimbursing stationery and postage expenses incurred for the Dutchman project as well as general Persona Arts work. James Oldham was paid £3.99 to reimburse stationery expenses for the Dutchman chorus workshop, July 2023.

## 10.6. Balance Sheet

FY23-24 Balance Sheet - 31st March 24 (£)				
<b>Assets</b>				
<b>Current Assets</b>	<b>Restricted</b>	<b>Unrestricted</b>	<b>Total</b>	
Cash Balance	88,193	962		89,155
Prepaid Subscriptions	436	271		706
Fixed Assets (Mobile Phone)	0	56		56
<b>Total Assets</b>	<b>88,629</b>	<b>1,288</b>		<b>89,918</b>
<b>Liabilities and Equity</b>				
Accruals	2,318	0		2,318
Equity (balancing line)	86,311	1,288		87,600
<b>Total Liabilities and Equity</b>	<b>88,629</b>	<b>1,288</b>		<b>89,918</b>

## 10.7. Income and Expenditure Statement

<b>FY Income Statement - 1st Apr 23 to 31st March 24 (£)</b>	<b>Restricted</b>	<b>Unrestricted</b>	<b>Total</b>
<b><u>Income</u></b>			
Sponsors and Donors	0	0	0
Grantmaking Donations	78,400	0	78,400
<b>Total Donation and Sponsorship</b>	<b>78,400</b>	<b>0</b>	<b>78,400</b>
Ticket Sales	63	0	63
<b>Total Event Revenue</b>	<b>63</b>	<b>0</b>	<b>63</b>
Other Income	0	346	346
Trustee membership	0	25	25
General Membership and Donations	0	244	244
<b>Total Other/General Income</b>	<b>0</b>	<b>615</b>	<b>615</b>
<b>Total Income</b>	<b>78,463</b>	<b>615</b>	<b>79,078</b>
<b><u>Expenditure</u></b>			
Artistic and Creative Costs	(8,279)	0	(8,279)
Project Admin Costs	(3,588)	0	(3,588)
Venue Hire	(980)	0	(980)
Marketing	(600)	0	(600)
<b>Total Event Costs</b>	<b>(13,446)</b>	<b>0</b>	<b>(13,446)</b>
Other Costs	(80)	(84)	(164)
Depreciation	0	0	0
Subscriptions	(400)	(904)	(1,304)
<b>Total General/Misc Costs</b>	<b>(480)</b>	<b>(988)</b>	<b>(1,467)</b>
<b>Total Expenditure</b>	<b>(13,926)</b>	<b>(988)</b>	<b>(14,913)</b>
<b>Income vs Expenditure in Period</b>	<b>64,537</b>	<b>(373)</b>	<b>64,165</b>

## 11. Principal Risks facing the Charity

- Current new profile of the charity causing low ticket sales for the July 2024 Dutchman performances (risk reduced by our extensive partnership and collaborator list to promote masterclass and performances to their contacts and communities. Subscription with Operabase to digitally advertise our profile on an international level).
- Building a greater contingency budget for the Dutchman project (risk assessed by reducing overall budget costs and appointment of the diligent project manager – Eleni Kyriacou).
- Low unrestricted reserves for charity use (risk assessed by researching and developing general fundraising strategies).

## 12. Risk Review

The Trustees carry out:

- Project reviews and risk management
- Safeguarding policy and procedures
- Health and safety policies and implementation
- Financial systems and forecasting
- IT and data system management

## 13. Principal Activities

The principal activities of the charity are as an opera and choral arts company.

## 14. Trustees

The trustees who held office during the period were:

Rosemary Rowley (Chair) resigned 1 September 2023

Toni Perry-Thomas (Secretary)

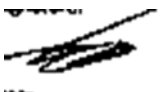
Andrew Simpson (Treasurer) resigned 31 March 2024

Byron Jackson FRSA (Artistic Director)

James Oldham

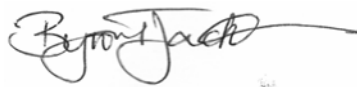
Julia Handelman-Smith FRSA appointed 1 February 2024

Signed on behalf of the Trustee's board:



**Toni Perry-Thomas**  
Secretary of Persona Arts

Date: 21/04/2024



**Byron Jackson FRSA**  
Artistic Director of Persona Arts

Date: 21/04/2024

## **Independent Examiner's report to the trustees of persona arts**

I report to the trustees on my examination of the accounts of persona arts for the year ended 31<sup>st</sup> March 2024

### **Responsibilities and basis of report**

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

### **Independent examiner's statement**

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

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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:



Name: Deldre A Mattison, MA ACA

Chartered Accountant

Address: 22 April Croft, Moseley, Birmingham, B13 9HP

Date:

26/9/24