persona arts | . . .

A Charitable Incorporated Organisation (CIO)

Report and Financial Statements

Year Ending 31 March 2026

Finalist for the Making Music Awards 2025 - The Best Project

The Flying Dutchman

— Charity No: 1197297 —

Persona Arts

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Reference and Administrative Details

Charity Number:	1197297
Correspondence Address:	57 Wednesbury Road, Walsall, West Midlands, WS1 4JL
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
TTR Consultants	Graham Suggett, Creative Tax Reliefs Limited, Pacific Chambers, 11-13 Victoria Street, Liverpool, England, L2 5QQ
Independent Examiner:	Paul O'Brien ACCA ICPA, Dragonfly - Accounting & Financial Management Ltd, 34 King James Close, Fordham, Cambridgeshire, CB7 5ZH

First Charity Trustees
Byron Jackson FRSA (Artistic Director)
Toni Perry-Thomas
James Oldham (Treasurer)

Trustees
Julia Handelman-Smith FRSA
Vincent Robert Edwards
James Holmes

Patron
Revd Canon Eve Pitts

With the exception of Julia Handelman-Smith appointed on 1 February 2024; Vincent Robert Edwards and James Holmes both appointed on 9 October 2025, the first charity trustees were appointed at the time of incorporation on 29 October 2021. The aforementioned named trustees will serve an initial term of 3 years.

Three of our trustees are ethnically diverse and one is acknowledged as disabled, supporting our mission to increase diversity and 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 and our number 07599 170762. More information about Persona Arts can be found on our web site: 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 for a term of 3 years 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 2026

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 2026, 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 2025 to 31 March 2026, a period of 12 months.

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 a diverse-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 standards 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.

Our long term goals are:

- To contribute to the evolving narrative of change in the UK's opera and classical music sectors, driven by ethnically diverse leaderships.
- To create formidable work in mainstream repertoire and cutting edge commissions showcasing the talent of under-represented artists in contemporary England.
- To inspire and educate the diverse communities of the West Midlands and beyond.
- To develop, educate and train artists and creatives in a breadth of repertoire towards a sustainable career, especially those from under-represented communities.

2. Review of Activities

This year (2025-26) has been solely focused on developing the infrastructure of our charity and meant we had no live music events or activities. At our AGM, deferred until October 2025, the Board resolved to establish subcommittees to lead the charity's operations, covering Finance, HR and Operations, Artistic Planning, and Community Engagement. Vanessa Rawlings-Jackson an experienced arts business consultant was engaged to support our Artistic Director and the Board in developing a five-year business plan. As part of this process, we have continued to develop our branding. Additional research and development (R&D) will be undertaken to secure future partnerships, and we have relocated our registered address to Walsall, enabling us to extend R&D into new communities. We also welcomed the esteemed international opera and music

theatre conductor James Holmes and community professional and classical singer Robert Edwards as new trustees.
Board meetings of the trustees are conducted online /(Zoom) due to logistics and geographical locations of the trustees

2.1 Business Plan 2026 – 2031

We are still developing our extensive business plan with the aim of ratifying and gradually implementing in the following year 2026-27.

2.2 Making Music Awards 2025 – The Best Project

We were delighted to be nominated and shortlisted for Best Project Award 2025 by Making Music, in recognition of our charity's work and community impact of our long-term Flying Dutchman opera project.

2.3 The Flying Dutchman Production: Video Footage

With ongoing editing support of James Oldham, we managed to upload our Dutchman opera performance with English subtitles with trailer videos to YouTube in October 2025 and have so far received over 2000 views worldwide.

3. Staff and volunteers

Persona Arts currently does not have payrolled or contracted staff. Andrew Simpson remains our finance officer on a very modest fee basis and Rahel Schweizer is our designated safeguarding officer on a similar premise. Byron Jackson had volunteered a fair amount of his time towards ongoing fundraising for the charity and extra admin.

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 fundraising are used for the purposes of furthering the objectives of Persona Arts and its activities.

6. General Policies and Insurances

As Persona Arts worked with children, young people and schools, a safeguarding policy had been created and can be found on our web site. This was reviewed and updated in December 2024.

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, 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

Paul O'Brien is appointed as the CIO's Independent Examiner, a chartered certified accountant accredited with the Institute of Certified Practising Accountants in England and Wales. As such, the board believes he 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 charity's 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, any 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(s).

10. Financial Review

At the end of our financial year 31 March 2026, our turnover was £28,322 which included a very good Theatre Tax Relief claim received from HMRC. This generous claim will allow us to improve sustainable operations and future projects for the charity.

10.1. Principal Funding Sources

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

This financial year (ending 31 March 2026), the charity were very grateful to receive support from the following:

Trusts and Foundations	**2025**	**2026**
The Arts Society	£1750	-
The Aspinwall Educational Trust	£1000	-

TOTAL Restricted Reserves accrued 25-26: £6,050

TOTAL Unrestricted Reserves accrued 25-26: £28,214

TOTAL Current Cash in Persona Arts bank account as of 31 March 2026: £33,751

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 £46.

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

For the year ending 2026, Byron Jackson was paid £1650 for consultancy work and reimbursed £110 for expenses connected to Persona Arts. James Oldham was paid £300 for extra work as subtitles editor for the Dutchman performance video. The board also confirms the payments complied with our governing document and legal requirements.

10.6. Balance Sheet

FY25-26 Balance Sheet - 31st March 2026 (£)			
Assets			
Current Assets	**Restricted**	**Unrestricted**	**Total**
Cash Balance	6,050	27,701	33,751
Prepaid Subscriptions	0	469	469
Assets	0	43	43
Total Assets	**6,050**	**28,214**	**34,264**
Liabilities and Equity			
Accruals	0	0	0
Equity (balancing line)	6,050	28,214	34,264
Total Liabilities and Equity	**6,050**	**28,214**	**34,264**

10.7. Income and Expenditure Statement

FY Income Statement - 1st Apr 25 to 31st March 26 (£)	Restricted	Unrestricted	Total
Income			
Sponsors and Donors	0	0	0
Grantmaking Donations	2,750	0	2,750
Total Donation and Sponsorship	**2,750**	**0**	**2,750**
Ticket Sales	(80)	0	(80)
Total Event Revenue	**(80)**	**0**	**(80)**
Other Income	0	0	0
Trustee membership	0	20	20
General Membership and Donations	0	234	234
Theatre Tax Relief	0	25,398	25,398
Gift Aid	0	0	0
Total Other/General Income	**0**	**25,652**	**25,652**
Total Income	**2,670**	**25,652**	**28,322**
Expenditure			
Artistic and Creative Costs	0	0	0
Marketing	0	0	0
Project Admin Costs	0	0	0
Venue Hire	0	0	0
Total Event Costs	**0**	**0**	**0**
Other Costs	0	(30)	(30)
Accountancy Fees	0	(880)	(880)
Subscriptions	0	(735)	(735)
Theatre Tax Consultancy Costs	0	(3,600)	(3,600)
Video Editing	0	(300)	(300)
Business Consultancy Fees	0	(2,950)	(2,950)
Accounting Adjustments	657	(657)	0
Total General/Misc Costs	**657**	**(9,153)**	**(8,495)**
Total Expenditure	**657**	**(9,153)**	**(8,495)**
Income vs Expenditure in Period	**3,327**	**16,499**	**19,827**

11. Principal Risks facing the Charity

- Administrative issues impacting the operations of the charity (risks mitigated by looking to hire a freelance general administrator to help support the varied functions of the charity and our recent appointment of a designated safeguarding officer).

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
- Business plan development

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:

Vincent Robert Edwards
Julia Handelman-Smith FRSA
James Holmes
Byron Jackson FRSA
Toni Perry-Thomas
James Oldham

Signed on behalf of the Trustee's board:

Byron Jackson
Artistic Director of Persona Arts

Date: 10 July 2026

Signature: *Toni Perry-Thomas*
Toni Perry-Thomas (Jul 10, 2026 22:00:11 GMT+1)
Email: tjperrythomas@gmail.com

Toni Perry-Thomas
Trustee of Persona Arts

Date: 10 July 2026

Persona Arts

Independent Examiners report to the Trustees
For the year ended 31 March 2026

I report to the charity trustees on my examination of the accounts of Persona Arts for the year ended 31 March 2026, which are set out on the following pages.

This report is made solely to the Charity's trustees, as a body, in accordance with section 145 of the Charities Act 2011. 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 this report and for no other purpose.
To the fullest extent permitted by law, I do not accept responsibility to anyone other than the Charity and the Charity's trustees as a body, for my work, for this report, or for the opinions I have formed.

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 rquired for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:
* examine the acconts under section 145 of the 2011 Act
* to follow the procedures laid down in the general Directions given by the commission under section 145(5)(b) of the 2011 Act
* to state whether particular matters have come to my attention

Basis of independent examiner's report
My examination was carried out in accordance with the 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 financial statements presented with those records.

It also includes consideration of any unusual items or disclosures in the financial statements and seeking explanations from you as 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 financial statements present a 'true and fair view' and the report is limited to those matters set out in the statements below.

Independent examiner's statement
In connection with my examination, no matter has come to my attention:

1) which gives me reasonable cause to believe that in any material respect the requirements
   * to keep accounting records in accordance with section 130 of the 2011 Act and
   * to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

   have not been met or
2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached

Paul O'Brien

Name: Paul O'Brien (ICPA)) - Dragonfly (Accounting & Financial Management) Ltd
Address: 34 King James Close, Fordham, Ely, CB7 5ZH