



Trustees' Annual Report for the period

From 1 January 2023 To 31 December 2023

Charity name: York Opera

Charity registration number: 700279

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The presentation of opera performances in North Yorkshire... and to promote and encourage the love of opera in North Yorkshire
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	During the year the company gave three performances of "The Elixir of Love" (Donizetti) at the Joseph Rowntree Theatre, York and three performances of Macbeth (Verdi) at the York Theatre Royal. The company also gave two Christmas concerts including William Lloyd Webber's cantata "Born a King".
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have reviewed the guidance on public issued (PB1) by the charity commission and is satisfied that it meets the requirements

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	The company does not give grants, although on occasion it may waive or reduce membership fees – especially for young musicians. Our aim is that no-one who wishes to sing opera is prevented from doing so because of membership fees.
Policy on social investment including program related investment	Para 1.38	Not applicable
Contribution made by volunteers	Para 1.38	Almost all the activities of York Opera are undertaken by volunteers. This includes our Musical and Stage Directors, all our principals, and members of the chorus. In addition, we have very active teams involved in the design and build of sets. and in the design and making of costumes.

		Finally, we have active social and fund-raising groups and volunteers are also involved in the business side of the company.
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>As described above, the company gave three performances of "The Elixir of Love" (Donizetti) at the Joseph Rowntree Theatre, York and three performances of Macbeth (Verdi) at the York Theatre Royal. The company also gave a Christmas concert including William Lloyd Webber's seldom performed cantata "Born a King".</p> <p>Both Elixir and Macbeth were performed with full orchestra in a professional theatre. We do not require our chorus to audition – and this long held policy is core to our purpose of bringing people into opera.</p> <p>We do competitively audition for principal roles and require a high standard. We offer roles both to recent graduates wishing to develop careers in music, and those who wish to deepen their musical knowledge and experience. In the year we also provided opportunities to new directors – working under the mentorship of more experienced directors.</p> <p>We sing in English and our goal is to bring well designed, directed and performed opera to York audiences in an accessible way.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<p>We set ourselves a very challenging programme for the year, requiring substantial musical resources and complex staging and wardrobe. This was all achieved from our resources. The works were very well received and with reviewers commenting on the quality of music and the visually compelling sets.</p> <p>We are now also exploring outreach opportunities to schools and ways in which we can further encourage the musical life of York.</p>
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<p>Performance of fundraising activities against objectives set</p>	<p>Para 1.41</p>	<p>The substantial loss experienced during the year has led us to undertake a review of budgeting procedures, and we are exploring opportunities to change both timing and venues of our performances, without reducing our commitment to musical quality.</p> <p>We are actively reorientating our sales and marketing approach towards social media and seeking opportunities to raise further revenue from grants and sponsorship.</p>
<p>Investment performance against objectives</p>	<p>Para 1.41</p>	<p>Not applicable</p>
<p>Other</p>		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	In the year, York Opera made a loss of £6,362 and finished the year with net assets of £20,786. The loss would have been significantly higher but for a timely and unbudgeted legacy. The Trustees have taken steps to ensure that this loss is not repeated in 2024.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We hold sufficient funds to manage our very uneven cash flows comfortably. Our membership fees are set to pay for everyday expenses such as rehearsal space and rent on our wardrobe and set stores. However, we do not typically receive ticket income from the theatres until after we have had to pay costs – especially those relating to orchestral expense and we keep reserves to manage this. Our reserves also allow us to manage unforeseen losses like that which we suffered this year.
Amount of reserves held	Para 1.22	£20,786
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	n/a

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		Not Applicable
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Unincorporated association
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustees including officers (Chair, Treasurer, Secretary) are elected by members at the annual general meeting.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	York Opera
Other name the charity uses	n/a
Registered charity number	700279
Charity's principal address	2 St Roberts Gardens, Knaresborough, North Yorkshire HG5 8EH

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	n/a
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	n/a
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	n/a

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
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Name of chief executive or names of senior staff members (Optional information)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Ian Thomson-Smith	ADRIAN COOK
Position (eg Secretary, Chair, etc)	Chair	Treasurer
Date	29 OCT 2024	

YORK OPERA

General Income and Expenditure (outside of productions)

Income	Donations	615.00
	Gift aid	0.00
	Interest	210.21
	Subscriptions	4,445.00
	Rehearsal refreshments	508.30
	St Crux	0.00
	Legacy from M Turnecliffe	6000
	Total Income	<u>11,778.51</u>

Expenditure	Card and processing fees	8.09
	Costume store	135.65
	Insurance	190.00
	Internet	244.80
	Other sundry expenses	140.00
	Rehearsal venues	3,655.00
	Rehearsal refreshments	45.00
	Scenery store	3,100.41
	St Crux	0.00
	Total Expenditure	<u>7,518.95</u>
	Profit	<u>4,259.56</u>

Christmas Concerts

Income	Ticket sales	946.70
	Refreshments	68.00
	Total Income	<u>1,014.70</u>

Expenditure	Music hire	65.50
	Refreshments	31.50
	Venue hire	65.00
	Licence	21.00
	PRS allowance	15.71
	Total Expenditure	<u>198.71</u>
	Profit	<u>815.99</u>

Elixir of Love

Income	Ticket Sales	6,422.80
	Programme sales	133.50
	Total Income	<u>6,556.30</u>

Expenditure	Music hire	688.12
	Hire of JRT	3,659.15
	Orchestra	3,600.00
	Publicity	409.60
	Set and Costumes	588.59
	Transport	780.00
	Total Expenditure	<u>9,725.46</u>
	Loss	<u>-3,169.16</u>

Macbeth

Income	Programme	286.00
	Ticket Sales	7,737.41
	Total Income	<u>8,023.41</u>

Expenditure	Licence and rights	1,432.20
	Music hire	316.27
	Orchestra	7,610.00
	Production Team	1,185.00
	Programme	592.00
	Publicity	468.20
	Transport	780.00
	Set and Costumes	2,027.55
	Theatre charges	1,880.52
	Total Expenditure	<u>16,291.74</u>
	Loss	<u>-8,268.33</u>



59 Woodwarde Road,
London
SE22 8UN
7 July 2025

Independent examiner's report to the trustees of York Opera

I report to the trustees on my examination of the accounts of York Opera for the year ended 31 December 2023.

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: Stephen Waters ACA
Member of the Institute of Chartered Accountants in England and Wales.
Address: 59 Woodwarde Road, London SE22 8UN