

Performance Report for Sugarfoot Stomp

For The Year Ending

2020



Non-Financial Information

02 Entity Information

13 Statement of Service Performance

Financial Information

43 Statement of Receipts and Payments

47 Statement of Resources and Commitments

49 Notes to the Performance Report





Entity Information

Who are we?

Why do we exist?

Legal Name of Entity

Sugarfoot Stomp Incorporated

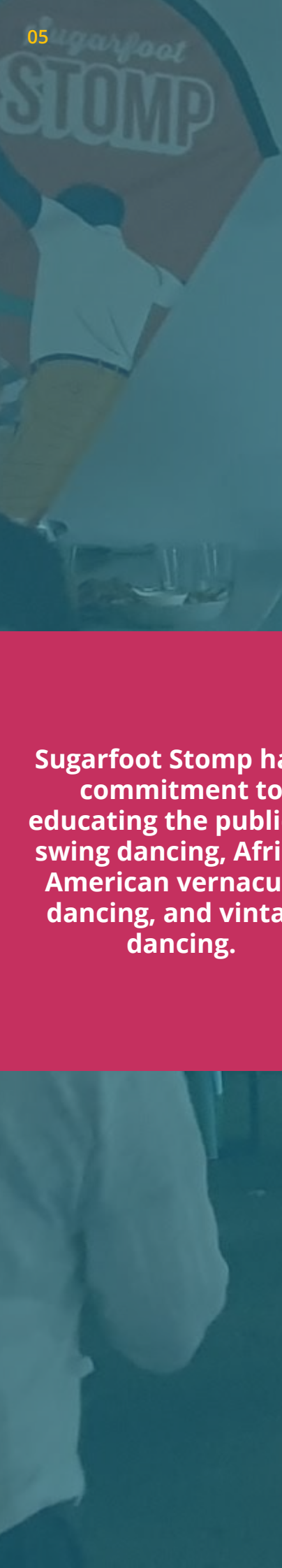
Type of Entity and Legal Basis (if any):

Incorporated Society and Registered Charity

Registration Number

CC55910





Exit

Sugarfoot Stomp has a commitment to educating the public on swing dancing, African American vernacular dancing, and vintage dancing.

Sugarfoot Stomp's mission is to contribute to the global swing dance community (based in the Wellington region) by running regular dance classes, workshops and dance events.

Entity's Purpose or Mission



Keeping people connected face to face through experiencing the joy of vintage solo and partnered dancing.

We also aim to increase the public's understanding and appreciation of swing dancing, African American vernacular dances, and vintage dances by providing performances of an artistic nature.

Entity's Purpose or Mission: Historical Background

Over the past 40 years Swing Dancing has exploded into a global revival. Originally, the Savoy Ballroom in Harlem, New York was the birthplace of Swing Dancing.

In particular a style called Lindy-Hop was developed in the 1920s, 1930s and 1940s in partnership with the swinging Jazz music played and sung by Savoy Ballroom Band greats such as Chick Webb, Count Basie, Duke Ellington, Louis Armstrong, and Ella Fitzgerald. As popular music changed, this dance style slowly fell out of fashion.

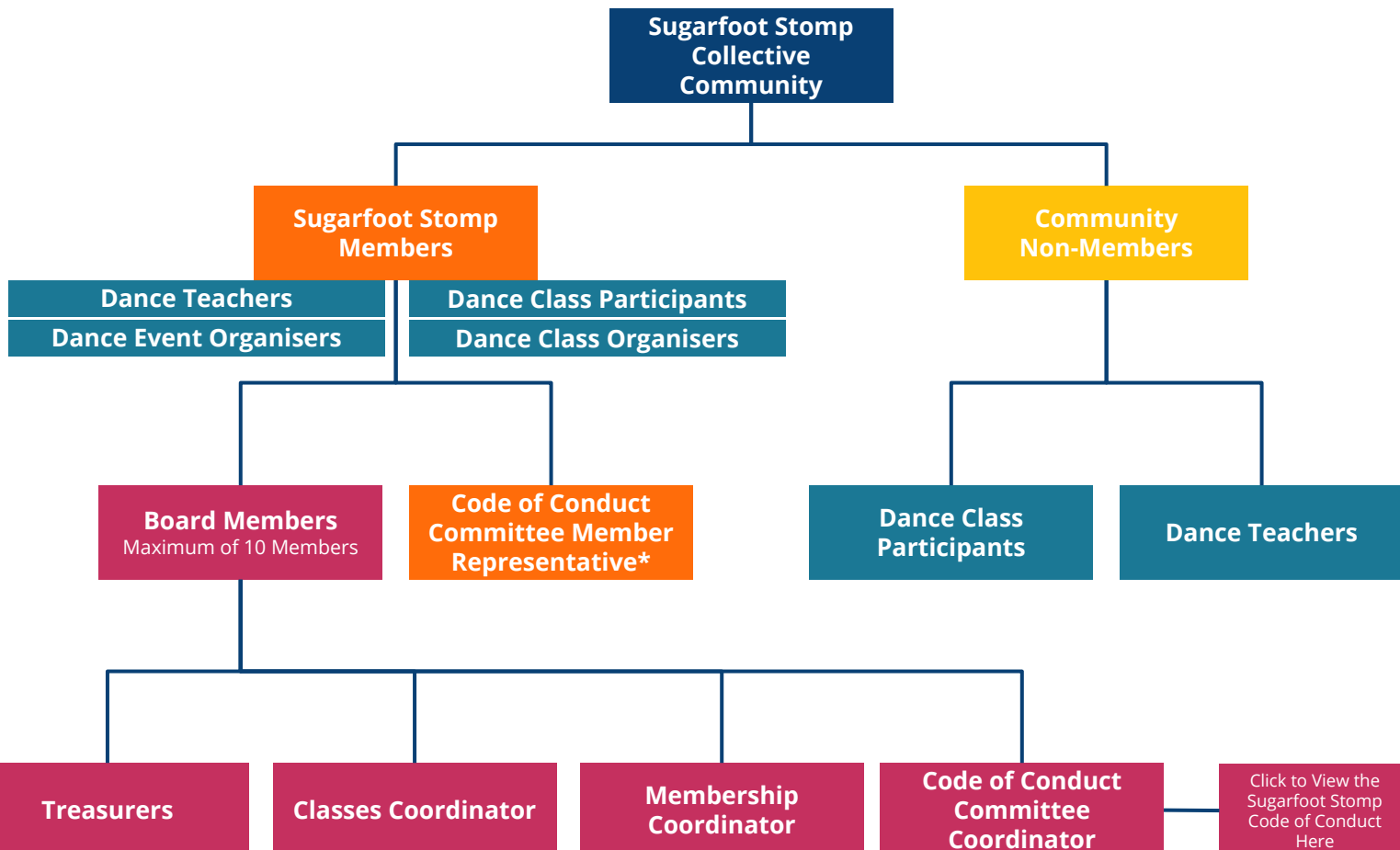
Then, in the 1980s, a group from Sweden got hold of VHS tapes and were mesmerised by the athletic swing dancers performing in the 1941 movie *Hellzapoppin'*. They discovered that one of the dancers, Frankie Manning, was still alive and about to retire from his many years working in the American postal service. Frankie agreed to teach swing dancing, and slowly other 'old timers', such as Norma Miller, were brought out of retirement and back onto the dancefloor for one last dance.

Swing Dance Camps were established with dance workshops so people could come and learn this partnered social dance. Following this, local communities were set up with weekly classes and regular social dances.

Fast forward to 2020 and swing dancing has an ever growing extensive global community where people connect through the magical language of partnered social dance.

[Click this link to view the full Origins of Swing Dancing Story](#)

Entity Structure



*Frankie Manning



The Sugarfoot Stomp Collective Community is made up of Sugarfoot Stomp Members and Community non-members.

Sugarfoot Stomp operations in 2020 were administered, managed, and guided by a volunteer Board made up from the membership base of 21 people. Currently, there are 4 Board Members, including two Board Members who are designated as Treasurers.

The Treasurers are responsible for managing the financial affairs. The Board meets 3 to 4 times a year and focuses on strategy, finances and growth of the membership base. A calendar overview set by the Board organises and tracks the outputs of the year.

A membership register is kept by the Membership Coordinator and is regularly updated when new members join via google form on the website. The Code of Conduct Committee is responsible for upholding the Sugarfoot Stomp code of conduct and reporting any potential breaches, with recommendations, to the board for discussion and a possible course of action if any is needed.

Sugarfoot Stomp's main operational output for 2020 was holding regular, affordable swing dance classes to meet our charitable purpose of education.

The organisation of these classes are overseen by at least two Board Members as well as one off workshops and/or events.

Sugarfoot Stomp Members are encouraged to strengthen the dance community by running their own classes, workshops or events. The Board provides scaffolding and guidance (e.g. an information guide for planning, financial advice from the Treasurer etc...) to the member to aid the success of their particular dance project.

The class, workshop or event is given the green light once all aspects of the management are planned and approved by the Board.

This collaborative model helps to boost the know-how in the dance community and encourages members to spread the joy of their passion for partnered swing dancing.

Sugarfoot Stomp Board Members 2020



Amy Burt

Treasurer
Membership Coordinator
Pedagogy / Professional
Development

Elise Broadbent

Account Signatory

Hamish Cameron

Code of Conduct Coordinator
Classes Coordinator

Steph Fairless

Treasurer

Sugarfoot Stomp Members 2020

Amy Burt

Elise Broadbent

Hamish Cameron

Steph Fairless

Jenny Harding

Tom Eastman

Sam Copeland*

Andrew Brendenkamp

Harriet Richards

Patrick Copeland

Clifton Chan

Ken Allen

Tommy Fearn

Matt Jenkins

Darryn McLraith

Kara Knight

Polly Cunningham

Chris Morris

Bernice Jackson

Shieva Norusian

Alan Collins



Main Sources of the Entity's Cash and Resources

The main sources of cash are from dance classes to educate the public and semi-regular dance events to promote the activity of Swing Dancing.

The dance events sometime involve musicians from the local Wellington Jazz scene.

Any excess revenue from these activities (after costs are covered) goes straight back into the organisation to cover the annual running costs and to fund future Swing Dancing events for the Wellington Dance community.

Main Methods Used by the Entity to Raise Funds

Currently, Sugarfoot Stomp relies on a small membership fee on joining as a Sugarfoot Stomp member.

Entity's Reliance on Volunteers and Donated Goods or Services

- Sugarfoot Stomp is run by a small group of passionate Board Member volunteers who are involved in sustaining the Swing Dancing Scene in Wellington. Sugarfoot Stomp Members are able to take up formal and informal roles within the organisation as needed.
- Board Members and Members give their time to organise and promote swing dance activities around the Wellington region and globally through the Sugarfoot Stomp Facebook and Instagram social media pages, Facebook Community Group and Sugarfoot Stomp website.
- The Facebook Community Group was set up for members of the community to increase communication about all things swing dancing, including the sharing of dance video clips for entertainment and teaching inspiration.
- The Sugarfoot Stomp Performance Troupe volunteer their time to showcase Lindy-Hop and Solo Jazz dance routines at Sugarfoot Stomp events and local Wellington events such as Newtown Festival and CubaDupa. Any funds raised go back into the operational costs of Sugarfoot Stomp.
- A few swing dance teachers choose to not take a teaching fee from their classes and workshops, therefore donating their time back to the dance community.
- The Southern Cross Restaurant and Bar was the free venue for the monthly Sunday Social Dancing during 2020.

Additional Information

Being incorporated in July 2018, Sugarfoot Stomp is still a fairly new Society and Registered Charity. The small Sugarfoot Stomp Board has worked extremely hard throughout 2020 to streamline the organisation and governance of the society after the big changes and challenges experienced at the end of 2019.

This work has included writing policy and procedure documents that provide a sustainable framework for all operations to be carried out smoothly, especially when members transition in and out of positions. In summary, Sugarfoot Stomp's 2020 outputs by the Board has been largely focused on 'laying the foundations' for the future.

The current treasurers presented a transparent financial report in July 2020 that outlined the steps to ensure the future financial stability of Sugarfoot Stomp. A full breakdown of the financial report is explored in the Notes to the Performance Report.

Creating our very own Sugarfoot Stomp community has been a result of the careful promotion of regular dance classes by the members.

This work has seen many new participants return to classes to further advance their dancing and even develop their confidence to join the social swing dancing events on offer.

It has been wonderful to grow an inclusive dance scene of passionate individuals of all ages who connect through partnered social dancing.

Over time the community connections result in gaining friendships as well as benefiting general health and well-being.

Measures of Success

The board identified 4 areas for their measures of success in 2020.

- The pure enjoyment and fun of connecting through dance
- How many students return to class
- The Sugarfoot Stomp Membership base
- The engagement of Members in the Society activities

These measures have been evidenced in the Statement of Service Performance.



Postal Address

20 Melbourne Road
Island Bay
Wellington 6023



Email

board@sugarfootstomp.co.nz



Website

<https://www.sugarfootstomp.co.nz/>



Facebook/Instagram

@SugarfootStompNZ

A group of diverse people, including a woman in a white dress and a man in a dark suit, are celebrating on a stage. They are hugging and smiling. One person in the background is holding a sign that says "Endorse JENKINS".

Statement of Service Performance

What did we do?

When did we do it?

Sugarfoot Stomp: Areas of Organisation and Management

What did we do?

The organisation and management for Sugarfoot Stomp is divided into three key areas, Learning How To, Building and Connecting The Community, and Keeping It All Running. Sugarfoot Stomp has a calendar of outputs that manages and tracks the details of all three areas all overseen by the Board. This calendar is regularly updated and amended with changes as needed to keep an accurate record of dates and activities that is easily accessible. Below is an explanation of each area.

Learning How To

This area of organisation is structured around activities that teach swing dance to the community. This takes the form of regular classes and one off workshops and meets our purpose for educating the public in vintage swing dancing. Each class runs for 1 block and is typically 6 weeks (6 sessions in total). There are usually 3-4 classes that run consistently throughout the year. Class content is built on from week to week and run for an hour. Most classes focus on teaching swing dancing to beginners. A workshop is a one-off event that focuses on a particular style or level of dancing, such as intermediate dancers or advanced dancers. Teachers come from the membership base or the community. Sometimes workshops involve guest teachers from other swing dance scenes around New Zealand.

Building And Connecting The Community

This area of organisation is focused on the activities that bring the collective swing dance community together. This includes both Sugarfoot Stomp Members and community non-members and takes the form of running Sugarfoot Stomp dance events, performances at dance festivals as well as getting involved in events around the Wellington region. These events are aimed at inspiring people into giving swing dancing a go by joining Sugarfoot Stomp run classes, workshops or events.

Keeping It All Running

This area of organisation sets out the meetings and discussions held to keep communication open and Sugarfoot Stomp operating. There are board meetings, the AGM, code of conduct committee meetings, member meetings, and working bees. All these meetings are distributed throughout the year.

This statement of service performance has been organised into chronological order to tell our 2020 story.

- Areas of Organisation and Management: January to March 2020
 - Learning How To
 - Building and Connecting the Community
 - Keeping It All Running
- COVID-19 Response
- Areas of Organisation and Management: June to December 2020
 - Learning How To
 - Building and Connecting the Community
 - Keeping It All Running

The description of the entity's outcomes, description and quantification of the entity's outputs, additional output measurers and additional information has been included in the above areas and has been told through written descriptions, tables, images, instagram posts, testimonials and videos.

Sugarfoot Stomp: Areas of Organisation and Management
What did we do?
January to March 2020

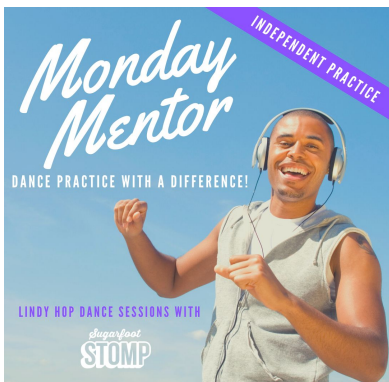
Learning How To

Building And Connecting The Community

Keeping It All Running

Learning How To January to March 2020

Class Type	Day and Venue	Frequency
Mentor Dance Sessions	Mondays at Webb Street Dance Studios	1 Block (6 Sessions)
SOLO Jazz	Mondays at Webb Street Dance Studios	1 Block (6 Sessions)
Learn to Swing Dance: Newtown	Tuesdays at Newtown Community Centre	1 Block (6 Sessions)
Learn to Swing Dance: Cuba Street	Wednesdays at Tarrant Dance Studios	1 Block (6 Sessions)
Sugarfoot Stomp Performance Troupe	Saturdays at Webb Street Dance Studios	7 Sessions



Building And Connecting The Community January to March 2020

Sugarfoot Stomp Social Events	Date	Venue
Photoshoot with the Wellington Tramways Museum and Wellington Photographic Society	Sunday 16th February	Wellington Tramways Museum
Harbourside JAM Outdoor Social Dancing	Sunday 1st March 11am-12pm	Wellington Waterfront Markets
Newtown Festival Performance by the Sugarfoot Stomp Performance Troupe	Sunday 8th March	Newtown Street Festival
Harbourside JAM Outdoor Social Dancing	Sunday 15th March 11am-12pm	Wellington Waterfront Markets



Harbourside JAM



Photoshoot in collaboration with the Wellington Tramways Museum and Wellington Photographic Society

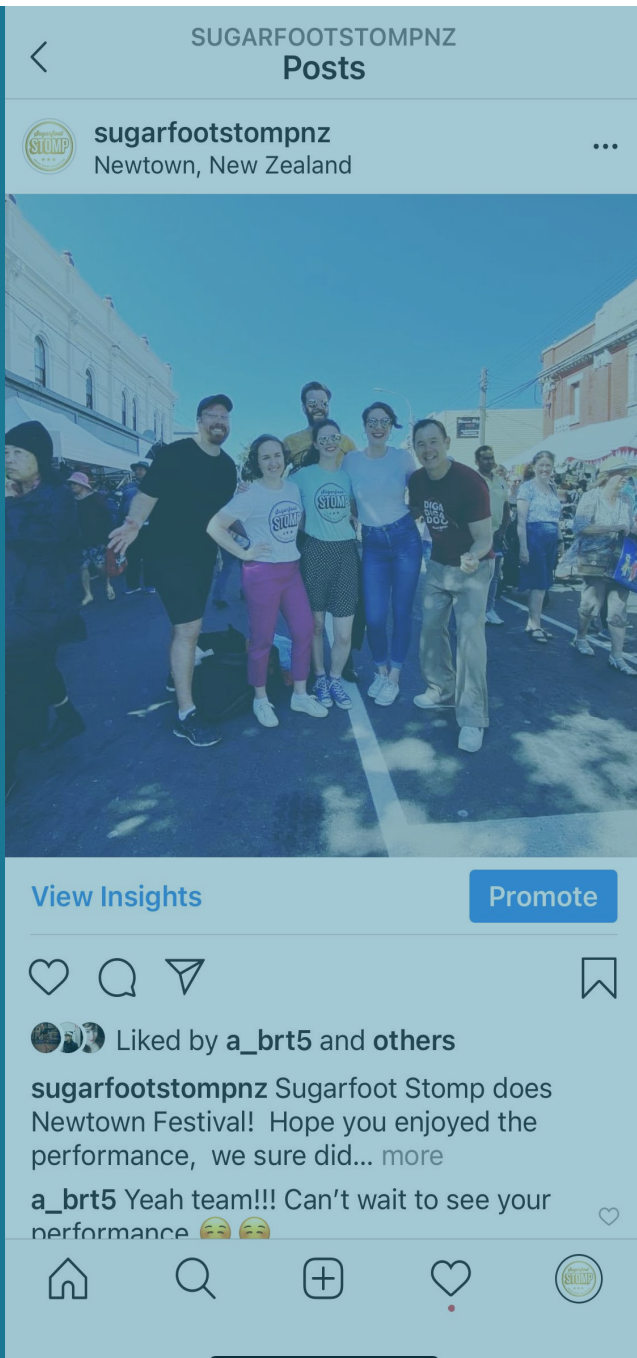
Keeping It All Running January to March 2020

Meeting

Date

Sugarfoot Stomp AGM

Saturday 22 February



*“The classes in
the Newtown
community
centre are
great”*

Keeping It All Running

Sugarfoot Stomp Board Policy and Procedure Documents

2020

Sharing the Know-How

The Sugarfoot Stomp Board created the Sugarfoot Stomp Information Portal using a google site in January 2020.

This hub enables members to access information about Sugarfoot Stomp such as the AGM process, membership register, organisational roles, how to organise and run dance workshops and/or dance events.

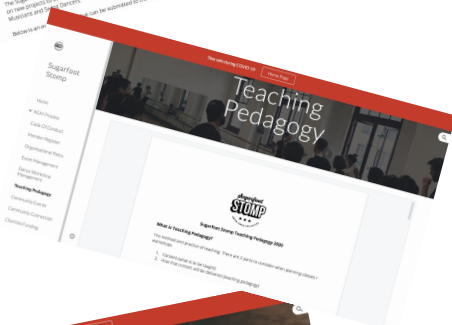
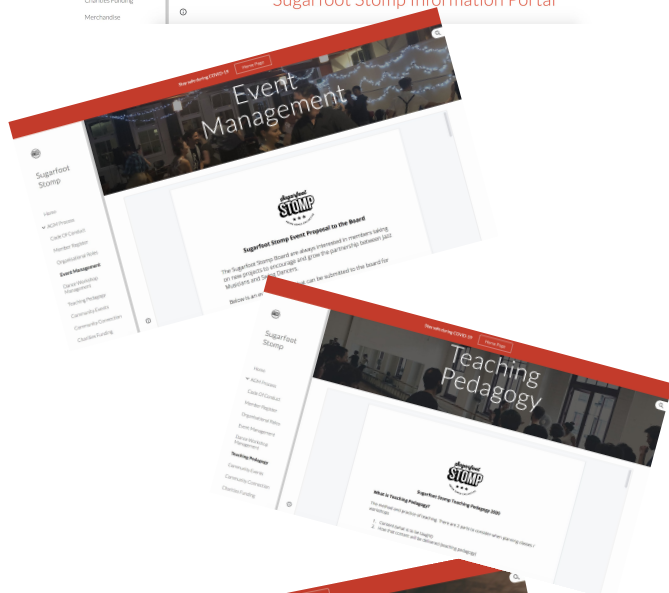
Under each page sits linked google docs, google slides PDFs and photos packed with information. The use of google docs and google slides allows documents to be updated by the Board in real time and the changes show straight away on the portal for the members.

Access to the Information Portal comes part of the Sugarfoot Stomp membership package.

Pages on the Information portal include;

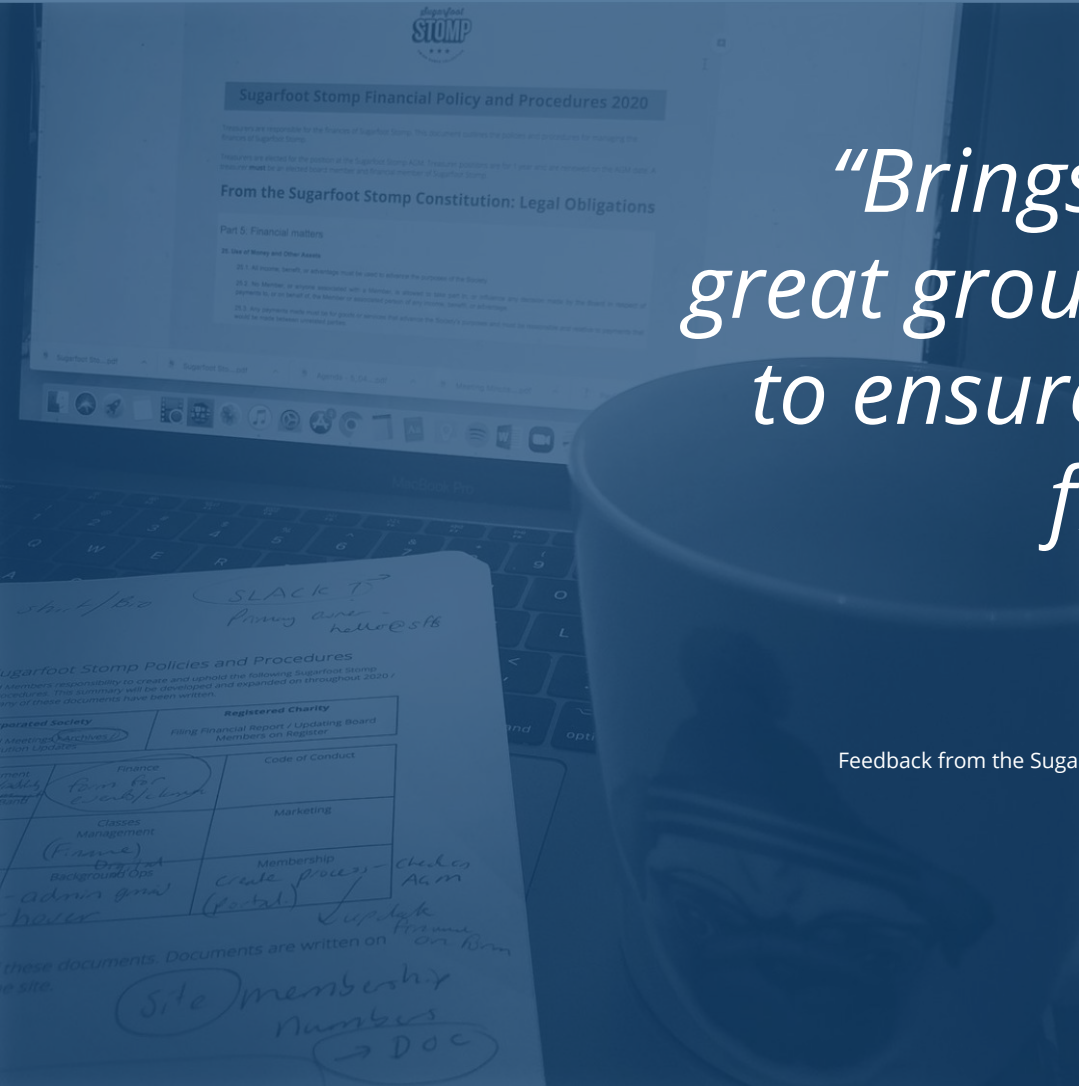
- Home- navigation
- AGM Process
 - AGM 2018
 - AGM 2019/2020
 - AGM 2020/2021
- Code of Conduct
- Member Register
- Organisational Roles
- Event Management
- Dance Workshop Management
- Teaching Pedagogy
- Community Events
- Community Connection
- Charities Funding
- Merchandise
- Assets

Useful information from other sources (e.g. charities website) is also included.





sugarfootstompnz
Wellington, New Zealand



“Brings together a great group of people to ensure that Lindy flourishes in Wellington”

Feedback from the Sugarfoot Stomp Annual Community Survey 2020

View Insights

Promote



Liked by a_brt5 and others

sugarfootstompnz A perfect ☁️☔️ day to be snuggled inside with a coffee ☕️ writing Sugarfoot Stomp Policy and Procedure... more

3 May 2020

Keeping It All Running Sugarfoot Stomp Board Policy and Procedure Documents

2020

Sustaining Sugarfoot Stomp

Re organising the operations of Sugarfoot Stomp was a huge undertaking for the reduced Board Members in 2020. The main goal was to streamline operations for clear communication not only between the Board Members but to the Members and wider community.

Many hours were spent creating the following Policy and Procedure documents;

- Sugarfoot Stomp Classes / Workshop Process
- Tuakana/Teina Relationship Policy
- SFS Safety Policy
- Complaints Policy and Procedure
- Disclaimer, Terms & Conditions
- Privacy Policy
- Digital Background Ops Policy and Procedure
- Leaving Policy
- Financial Policy and Procedures
- Interim Risk Management- COVID-19 (Health and Safety)
- Teacher Agreements
- Band Agreements
- AGM Process
- Event Proposal
- Class / Workshop Proposal

Engaging Community and Member Voice

In addition, the board introduced 2 annual surveys to collect both community and member voice. This idea came about while the board were having the strategy meetings in late 2019 and early 2020 and quickly realised the only voice in the planning were the remaining 4 board members. The board wanted to represent more voices in the direction of their strategy planning for future operations.

Annual Community Survey

The community survey was a quick-fire 5 question survey collecting information on the following.

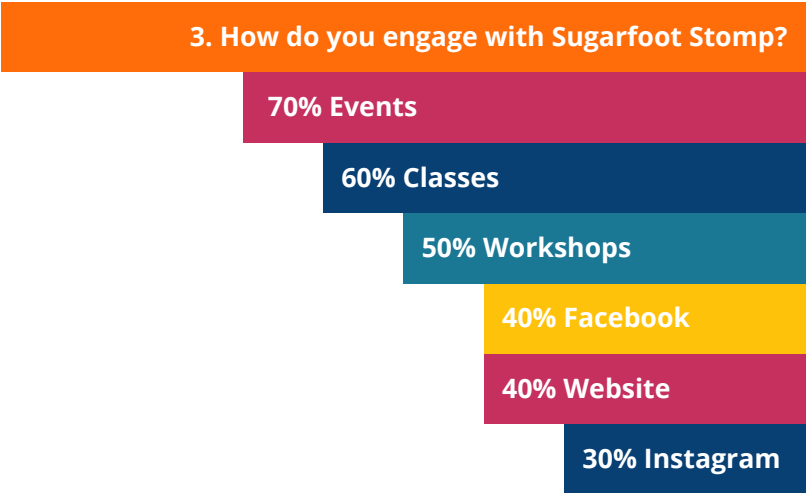
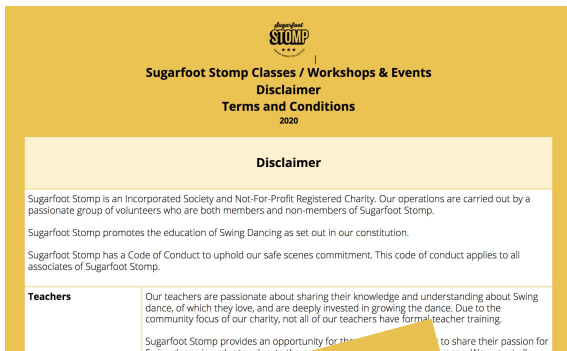
1. What excites you about Sugarfoot Stomp?
2. Sugarfoot Stomp is an Incorporated Society and Registered Charity, what benefits do you see this offering the Wellington dance community?
- 3. How do you engage with Sugarfoot Stomp? (check the ones that apply)- see below**
4. What is one Sugarfoot Stomp activity you would most like to see happen in 2021?
5. Any other thoughts/comments...

It was released and promoted on the Sugarfoot Stomp Facebook page and on the website. Being totally anonymous helped with gaining honest feedback.

Annual Member Survey

The member survey was more specific to constitutional matters where the members had to rank on a scale from 1-5 how well each objective from the constitution had been met, thus providing a quick snapshot for the board to evaluate the objectives. Other feedback about the financial position and future direction was also gathered.

The feedback from these surveys was used in the 2021 Strategy Meeting meeting and to provide testimonials throughout this performance report.





*"A special thanks to you all today.
We appreciated the effort and energy
you all exuded to make the
day successful."*

Feedback from David, part of the Wellington Photographic Society

Sugarfoot Stomp COVID-19 Response

COVID-19 and the subsequent lockdowns that resulted from mid-March, stopped Sugarfoot Stomp in its tracks.

A Board Member attended a webinar on *Responding to COVID-19* delivered by the Charities Services on Tuesday 12th May.

The webinar information helped guide Sugarfoot Stomp's Board planning in the following areas;

- Active strategic planning
- Clear communication with members
- Accurate financial figures and financial planning
- Risk management planning including a health and safety policy

The Board wisely used their time in the Alert Level 4 and Alert Level 3 lockdowns to review and write policies, processes and sort out the actual financial position of the Society to ensure survival of the community through the lingering effect of the COVID-19 pandemic.

Meeting virtually allowed the Board and Members to discuss strategy responses.

Keeping It All Running At Alert Level 4

Meeting	Date	Format
Board Meeting #1	Sunday 5th April	Online using Zoom
Board Meeting #1 continued...	Sunday 19th April	Online using Zoom
Sugarfoot Stomp Organisational Role Members Meet and Greet	Sunday 26th April	Online using Zoom

Sugarfoot Stomp COVID-19 Response

The Board decided to operate solo dance classes when New Zealand moved to Alert Level 2 out of Alert Level 3 in mid-May.

This was a wonderful opportunity to safely reconnect people with the dance community after the disruption. The board felt it important to take the lead in this area to start the transition back into operating classes. The other purpose of the decision to operate in Alert Level 2 was in order to generate income to help the society financially survive following the lockdown.

To ensure confidence from the class participants, the Sugarfoot Stomp Board created an Induction Information Guide to clearly communicate the health and safety procedures to dancers, teachers and the performance troupe.

Sugarfoot Stomp also freely shared this guide to other Swing Dancing Scenes around New Zealand and was globally recognised by a high profile swing dance teacher America.

Click this link to view the PDF
Sugarfoot Stomp Induction Information

Unite against COVID-19

Sugarfoot STOMP
SWING DANCE COLLECTIVE

COVID-19 Induction Information

Classes Teachers
Sugarfoot Stomp Troupe

This is a set of guidelines for all associates of Sugarfoot Stomp to help everyone understand safe practices for COVID-19 as it relates to dance. Our top priority is promoting safe practices. General Guidelines apply to everyone. Specific guidelines for classes, teachers and troupe are added.

General Guidelines

PERSONAL PROTECTIVE EQUIPMENT

- PPE is encouraged to be worn during class e.g. face coverings, masks
- Sanitise hands before touching your face

WASHING HANDS

- Wash and dry between fingers and back of hands before and after activity
- 20 seconds with soap
- Dry hands thoroughly
- WASH, WASH, WASH!

BATHROOMS

- Follow the signs on the doors
- Wipe / Sanitise Hands before and after entering the bathroom
- If others are waiting outside, try and keep 1 metre apart, 2 metres for unknown people

ACCESS TO VENUES

- 1 person to be in charge of the venue access
- Venue policies **MUST** be followed by everyone
- Place down the **NEW COVID Tracer App** as some venues will be using this for their contact tracing or sign in manually.

SICK

- Stay home

COUGHING AND SNEEZING

- Move away from others
- Cough and sneeze into your elbow
- Wash hands straight after

FILMING

- Only film content on your own phone
- Use tripod to pass videos on to teachers
- Use messenger to pass video onto groups
- Keep down phone / laptop if touched by another person

DRINK BOTTLES + FOOD EQUIPMENT

- Bring a **RE-USE** bottle or two
- No supplements to be used in venues
- Keep in mind straws will be closed off in some venues

Classes
All the General Guidelines PLUS +

REGISTRATION

- Register through an Online Form on the Website / Facebook Page
- Provide full name and valid email address to the teacher if not registered through the online form **BEFORE** the class starts

CONTACTLESS PAYMENT

- Sugarfoot Stomp encourages contactless payment
- Pay into Sugarfoot Stomp bank account **BEFORE** the class, if possible
- Cash is okay

CONTACT TRACING

- Provide all personal details asked for
- Details are kept securely in our Database
- **PLEASE** download the **NEW COVID Tracer App** as some venues will be using this for their contact tracing or sign in manually

SICK

- Stay home
- If you become sick during or 14 days after the class block then contact board@sugarfootstomp.co.nz
- **IMMEDIATELY**

PERSONAL EQUIPMENT

- Spare yourselves and bags / equipment out around the venue leaving a distance of 1 metre (or more)

ACCESS TO VENUES

- **Arrive 10-15 minutes early** to the class starting
- Some venues may have a door lock policy so **ARRIVE EARLY**
- Let your teacher / friend or someone in the class to assist for absence or messenger if you are running late
- Enter the venue observing the or 2m physical distancing for unknown people
- **Attendees must wash and / or sanitise hands before, during, and after class**

Teachers
All the General Guidelines PLUS +

ACCESS TO VENUES

- Remind attendees to enter the venues observing the or 2m physical distancing for unknown people
- Remind attendees to sign in using the venue guidelines
- Remind attendees they **must** wash and / or sanitise hands **before, during, and after** class + yourself
- Remind attendees to leave bags out

CHECK-INS

- **MUST** check in ALL attendees using the Class Management System
- Record Group in attendees full name and contact email on Class Management System
- **CHECK IN TO BE CONTACTED ONLINE BEFORE THE CLASS STARTS**
- Be careful of personal information displayed on laptop screens

CLEANING

- Follow **ALL** of the cleaning process of the venues

SICK

- Stay home
- If you become sick during or 14 days after the class block then contact board@sugarfootstomp.co.nz **IMMEDIATELY**

CLASS MANAGEMENT

- **READ OUT / DISPLAY** the General Guidelines before troupe starts
- **Be PRACTICE** with verbal reminders
- Attendees **must** wash and / or sanitise hands **before, during, and after** class

SAFETY

- You have the right to refuse entry to anyone who is showing cold and / or flu symptoms
- Your personal safety is the **TOP** Priority

INCIDENT REPORTING

- Make a note of the date, time and details of the incident
- Report to the Sugarfoot Stomp Board **IMMEDIATELY** with these details. Email to board@sugarfootstomp.co.nz

Sugarfoot Stomp Troupe
All the General Guidelines PLUS +

ACCESS TO VENUES

- Enter the venues observing the or 2m physical distancing for unknown people
- Record Group in attendees full name and contact email on Class Management System
- Troupe attendees **must** wash and / or sanitise hands **before, during, and after** practice

PHYSICAL DISTANCING

- Decision of the Troupe for practice

CHECK-INS

- Record who was at practice on the Sugarfoot Stomp Troupe Management Sheet

PRACTICE MANAGEMENT

- **READ OUT / DISPLAY** the General Guidelines before troupe starts
- **Be PRACTICE** with verbal reminders
- Attendees **must** wash and / or sanitise hands **before, during, and after** practice

CLEANING

- Follow all of the cleaning process of the venues

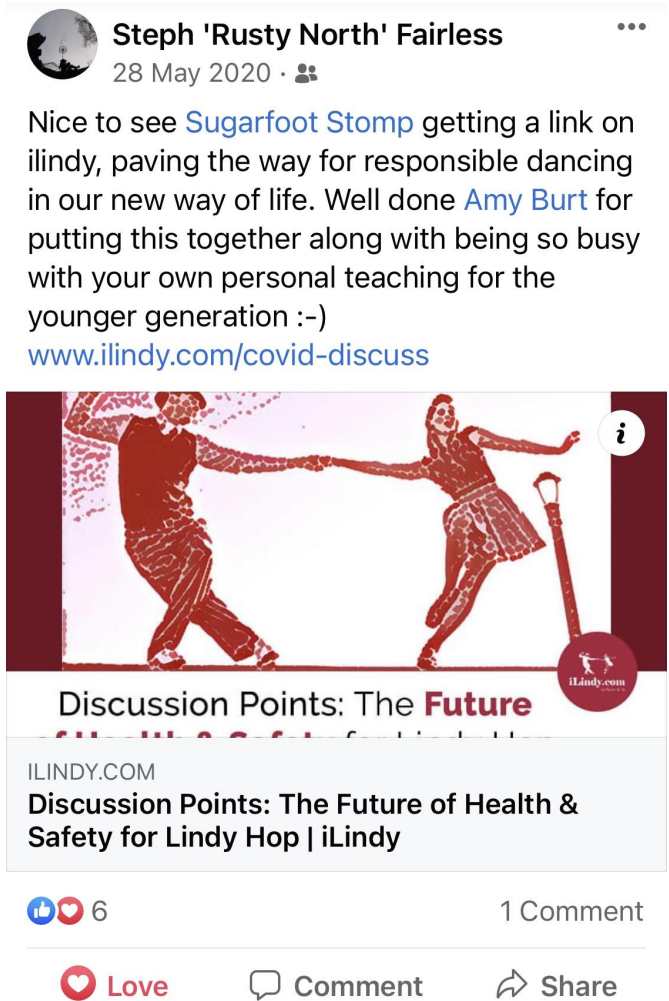
SICK

- Stay home
- If you become sick during or 14 days after the class block then contact board@sugarfootstomp.co.nz **IMMEDIATELY**

INCIDENT REPORTING

- Make a note of the date, time and details of the incident
- Report to the Sugarfoot Stomp Board **IMMEDIATELY** with these details. Email to board@sugarfootstomp.co.nz

Sugarfoot Stomp COVID-19 Response



"I really enjoyed the solo jazz class. This was my first time dancing after the first COVID lock down.

I think SFS (Sugarfoot Stomp) managed the COVID situation very well, finding the balance between safety, caution and enabling people to dance."

Feedback from the Sugarfoot Stomp Annual Member Survey 2020

Sugarfoot Stomp COVID-19 Response

The SOLO Special Dance campaign allowed the Sugarfoot Stomp Treasury to trial a brand new class registration and payment system to accurately track participation in classes. This was also necessary for the contact tracing requirements and contactless payments.

Block 2a ran successfully for 6 weeks.

It was positive to see people return to the SOLO classes after an extended period of uncertainty.

The classes bridged the gap between Alert Level 2 and Alert Level 1 when we could resume partnered swing dancing in June.

The SOLO Special focused on bringing affordable dance classes with a special combination deal offered if the participant took both classes.



Sugarfoot Stomp COVID-19 Response

5

People Attended

**SOLO Special
Beginner Tap for Swing Dancers**

Teacher: Amy B

Class Breakdown

- 3 Sugarfoot Stomp Members
- 2 Non-Members

10

People Attended

**SOLO Special
A-Z of Solo Jazz Open**

Teacher: Shieva

Class Breakdown

- 4 Sugarfoot Stomp Members
- 6 Non-Members

Restarting
Revisioning
Reconnecting

Operating Sugarfoot Stomp Post Lockdown June to December 2020

After the Board had revised the upcoming months of post lockdown, the members set about the task of not only reconnecting the community through dance classes but totally rebuilding it too. The new participants in classes pre lockdown had dropped off over the extended break. Running a partnered dance charity provides its own set of challenges during a global pandemic.

Members promoted the Learn to Swing Dance classes to attract new people through word of mouth and on social media. Many members connected with friends and work colleagues and talked them into giving swing dancing a try!

Members also contributed by sharing the teaching of the dance class blocks and covering for any teachers who were feeling overloaded, absent from illness or just needed a break for their well-being.

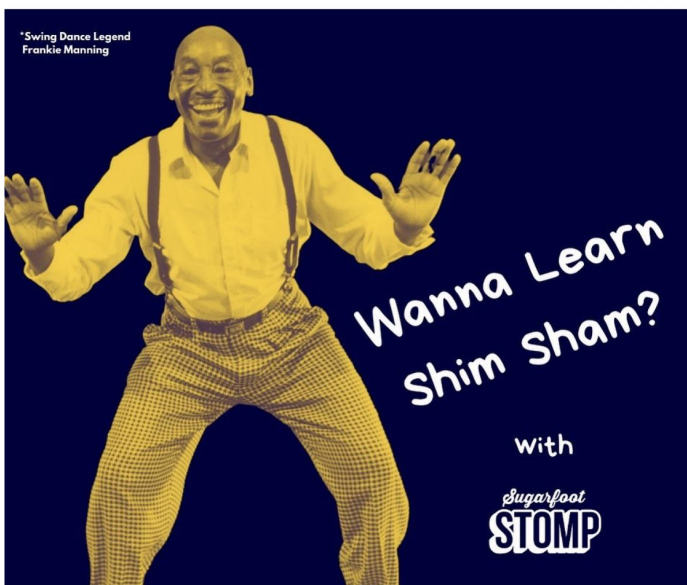
The addition of an Intermediate dance class provided the opportunity for people to progress their dancing to the next level. A member also connected the community by organising monthly social dancing events. Members volunteered their DJ skills during the events to keep the music jumpin' and the dancers swingin' out on the floor!

At the back of our minds was always the possibility of further lockdowns, however, throughout all the challenges faced, the team worked together to problem solve and create solutions.



sugarfootstompnz

Wellington, New Zealand



View Insights

Promote



Liked by a_brt5 and others

sugarfootstompnz Wanna Learn Shim Sham?
Yes Please!! 🎺 🎷

Check out the details and register here:

<https://www.sugarfootstomp.co.nz/classes>


#swing #swingdance #swingdancing #lindyhop
#music #jazz #jazzmusic #shag
#collegiateshag #blues #bluesdance #balboa

Sugarfoot Stomp: Areas of Organisation and Management
What did we do?
June to December 2020

Learning How To

Building And Connecting The Community

Keeping It All Running



Block 3 Upgrade



Monday
Learn to Swing Dance: Newtown
Intermediate Lindy Hop: Newtown

Tuesday
Open Performance Routine Class:
Newtown

Wednesday
Learn to Swing Dance: Cuba

Learn to Swing Dance



New Block of Classes
November / December



Halloween Ball

Monday
Learn to Swing Dance: Newtown
Intermediate Lindy Hop: Newtown




Learn to Swing Dance

Block 4 Classes



Sugarfoot STOMP

SWING DANCE COLLECTIVE



New Class Block Starts This Week



Monday
Learn to Swing Dance: Newtown
Intermediate Lindy Hop: Newtown

Tuesday
Open Performance Routine Class:
Newtown

Wednesday
Learn to Swing Dance: Cuba Street




Halloween Ball Performance Routine

Tuesday
Open Performance Routine Class:
Newtown



WEDNESDAY
Learn to Swing Dance: Cuba



Halloween Ball Performance Routine

Tuesday
Open Performance Routine Class:
Newtown



Wednesday
Learn to Swing Dance: Cuba St




Sweet Treat Taster

DANCE ROUTINE

it's THE DANCE OF Swing

The MOST Sensational DANCE THAT EVER HIT NEW YORK

The BIG APPLE

Everybody Can do the Big Apple

SAVOY Ballroom 140 STREET on LEONOX AVE

Savoy FEATURES Every SAT night Lindy Hop CONTEST The Big Apple THE DANCE THAT'S SWEEPING THE COUNTRY

WEDNESDAY
Learn to Jazz: Newtown

When you realise it's Week 3 of the Dance Class Block....



Totally Cool Just Drop In!

MONDAY
Learn to Swing Dance: Newtown
Intermediate Lindy Hop: Newtown

TUESDAY
Performance Routine Class:
Newtown

WEDNESDAY
Learn to Swing Dance: Cuba

Tuesday
Open Performance Routine Class:
Newtown



Learning How To June to December 2020

Class Block	Class Type	Day and Venue	Frequency
2	SOLO Jazz	Mondays at Tarrant Dance Studio	1 Block (6 Sessions)
2	Learn to Swing Dance: Newtown	Tuesdays at Newtown Community and Cultural Centre Dance Hall	1 Block (6 Sessions)
2	Learn to Swing Dance: Cuba Street	Wednesdays at Tarrant Dance Studios	1 Block (6 Sessions)
1 & 2 & 3	Sugarfoot Stomp Performance Troupe	Saturdays at Webb Street Dance Studios	Weekly
n/a	Workshop #1 Wanna Learn Shim Sham?	Saturday 1st August Pump Dance Studios	n/a
n/a	Workshop #2 Wanna Learn Shim Sham?	Saturday 8th August Pump Dance Studios	n/a
3 / 4 / 5	Learn to Swing Dance: Newtown + Social Dancing Practice (Block 4 + 5)	Mondays at Newtown Community and Cultural Centre Dance Hall	3 Blocks (18 Sessions)
3 / 4 / 5	Intermediate Lindy Hop	Mondays at Newtown Community and Cultural Centre Dance Hall	3 Blocks (18 Sessions)
3 / 4 / 5	Open Performance Routine Class	Tuesdays at Newtown Community and Cultural Centre Dance Hall	3 Blocks (18 Sessions)
3 / 4 / 5	Learn to Swing Dance: Cuba Street	Wednesdays at Tarrant Dance Studios	3 Blocks (18 Sessions)



FIRE EXIT

STOMP

THE CREEPER

R. WATSON
ENGLISH
L. SIDEKIC

Block 2 & Block 5 Learn to Swing Dance: Newtown

Class Numbers

This is a spotlight on the Learn to Swing Dance class numbers run in Newtown over 4 blocks from June to early December.

It shows the healthy growth in the number of block passes purchased by Non-Members as well as the Tuakana/Teina relationship opportunities been explored by the experienced Swing Dancers of Sugarfoot Stomp.

Overall, numbers have increased in this class which indicates the growing following of Sugarfoot Stomp.

11

People Attended Class

Block 2 Learn to Swing Dance: Newtown

Teachers: Matt / Amy B

Class Breakdown

Block Passes

- 1 Sugarfoot Stomp Member
- 2 Non-Members

Drop In

- 8 Non-Members

20

People Attended Class

Block 5 Learn to Swing Dance: Newtown

Teachers: Hamish / Bernice

Class Breakdown

Block Passes

- 0 Sugarfoot Stomp Members
- 12 Non-Members
- 4 Tuakana/Teina

Drop In

- 4 Non-Members

Building And Connecting The Community June to December 2020

Sugarfoot Stomp Social Events	Date	Venue	Music
Welcome Back Dance FREE EVENT	Sunday 21st June 6pm - 8pm	Southern Cross Restaurant and Bar	DJ Swing Music by Volunteer Member Amy B
Sunday Social at the Cross #1 FREE EVENT	Sunday 19th July 6pm - 8pm	Southern Cross Restaurant and Bar	DJ Swing Music by Volunteer Member Hamish
Alert Level 2 x2 Southern Cross Social Dancing Event Dates Postponed			
Sunday Social at the Cross #2 FREE EVENT	Sunday 27th September 6pm - 8pm	Southern Cross Restaurant and Bar	DJ Swing Music by Volunteer Members Hamish & Alan
Sunday Social at the Cross #3 FREE EVENT	Sunday 18th October 6pm - 8pm	Southern Cross Restaurant and Bar	DJ Swing Music by Volunteer Member Steph & Kara
Sugarfoot Stomp Halloween Ball	Friday 30th October 7pm - 12am	Thistle Hall	Live Jazz Music by Lauren Armstrong and the Skeletones
Sunday Social at the Cross #4 FREE EVENT	Sunday 15th November 6pm - 8pm	Southern Cross Restaurant and Bar	DJ Swing Music by Volunteers Amy B & Bernice

Keeping It All Running June to December 2020

Meeting	Date	Format
Board Meeting #2	Saturday 15th August	Online Via Zoom
Board Meeting #3	Saturday 28th November	Online Via Zoom
Strategy Meeting for 2021 #1	Wednesday 2nd December	In Person

Volunteer Hours for 2020 (Approx.)

1,078





Sunday Social at the Cross!

How do you know about Sugarfoot Stomp?

Measure of Success

- How many students return to class

This year the board was interested in where the class and workshop participants were originating from in order to make informed decisions about how to get more people into taking that first step into the community.

The treasurer added a section in the registration google form where people signed up for the class blocks and workshops asking how participants knew about Sugarfoot Stomp. After collating the information it was presented in a board meeting for discussion.

The following statistics were collected in the 74 responses from the google form registrations in Blocks 2, 2a, 3 & 4 plus the Wanna Learn Shim Sham workshop.

Out of all the options, the highest percentage of registrations came from returning students to the classes, followed closely by friend recommendations therefore meeting one of the measures of success the board had for 2020.

21.6% Returning Students to Class

20.3% Friend Recommendation

17.6% Already a Sugarfoot Stomp Member

12.2% Facebook

9.5% Website

8.1% Saw a Public Performance

Sugarfoot Stomp Tuakana/Teina Relationships September 2020

To increase the connection between experienced (advanced) dancers and beginner swing dancers, Sugarfoot Stomp has crafted an approach using the Māori perspective of Tuakana/Teina.

These relationships form holistically in a multi-level dance class and on the social dance floor. The board wished to bring more of a lense to developing Tuakana/Teina in a class setting.

Click on the Tuakana/Teina Poster to view the full document online on the Sugarfoot Stomp Website.

Sugarfoot Stomp Dance Routine October 2020

Sugarfoot Stomp's name comes from the swing dance song *Sugarfoot Stomp*.

So it is only natural that a member choreographed a unique, inclusive routine for all dance levels in order to showcase both Solo Jazz and Lindy Hop!

This routine features members from the Sugarfoot Stomp Performance Troupe, Tap Ladies and the Tuesday Open Performance Routine Class and had its debut at the Halloween Ball Event.

During a year when the global community was connecting via zoom for dance classes, we were lucky enough to teach the choreography face to face.

Set routines are a great way to bring members of the dance community together to work towards a common performance goal. The cross grouping of this particular routine joined different groups of people together.

Click on the picture opposite to view the full video clip of the routine on Youtube.





TUAKANA / TEINA IS A UNIQUE MĀORI APPROACH

That enables the fostering and development of dance relationships within the Sugarfoot Stomp Community

Tuakana / Teina Relationships at Sugarfoot Stomp

Tuakana/teina Relationships at Sugarfoot Stomp are formed between a participant in the learn to swing dance class and a dancer who is....

- **In the Sugarfoot Stomp Performance Troupe**
(for the current Troupe operating block)

AND/OR

- **A current participant of a corresponding intermediate class and has paid for the intermediate block**
(not a Drop-In)

AND/OR

- **A current Sugarfoot Stomp Board Member**

Our tuakana / teina's volunteer activity or participation in regular paid classes as mentioned above ensures the dancer is 'giving back' to Sugarfoot Stomp charity and community. Not just consuming activities on offer, for free, with no return or contribution to the charity. For this reason, teachers alone do not qualify, as the teachers are paid for their services.

Tuakana / Teina Relationship Approach

Tuakana/teina refers to the relationship between an older (tuakana) person and a younger (teina) person and is specific to teaching and learning in the Māori context.

Within teaching and learning contexts, this can take a variety of forms:

Peer to peer – teina teaches teina, tuakana teaches tuakana.

Younger to older – the teina has some skills in an area that the tuakana does not and is able to teach the tuakana.

Older to younger – the tuakana has the knowledge and content to pass on to the teina.

Able to less able – the learner may not be as able in an area, and someone more skilled can teach what is required.



Tuakana / Teina Role in Sugarfoot Stomp Classes

Sugarfoot Stomp operates under the belief that having dancers of various levels within a beginner class, (ie beginner, intermediate, advanced) improves the outcome of the class and helps build new or beginner dancer's confidence and technical ability at a faster rate.

The objective of having multiple tuakana/teina relationships develop in the class is to:

- Connect dancers of various levels within the scene
- Provide a role model of Sugarfoot Stomp community values
- Exert a positive influence in the class



It's important to clarify the distinction between tuakana/teina and a teaching assistant. The tuakana/teina is **still a student** (not a teacher). The tuakana/teina should default to the teacher when asked for feedback from fellow students and not give unsolicited advice on someone else's dancing unless explicitly asked.

Dissolving a Tuakana / Teina Relationship

If it is clear it's no longer appropriate for a student to attend a beginner class in a tuakana/teina role, or if they aren't meeting minimum criteria, then the teacher(s) should ask said student to start paying for the beginner classes. This is until they feel it appropriate for the student be in the tuakana/teina role again.

Such indicators might be:

- The student is regularly struggling with the class material
- The student isn't attending the Sugarfoot Stomp Performance Troupe or an intermediate class on a regular basis
- The student is being disruptive in class (ie, talking too much while the teacher is talking, giving regular unsolicited feedback etc)

The Sugarfoot Stomp Board is available as a resource to talk with a student if the teacher(s) feel unable to communicate with them directly.



Sugarfoot Stomp: Areas of Organisation and Management

What did we do?

Summary

Learning How To

Description	This Year 2020	Last Year 2019
Class Blocks (6 week consecutive sessions)	19	20
Workshops	2	7
Sugarfoot Stomp Performance Troupe 2 Hour Sessions	33 weeks	46 weeks

Building And Connecting The Community

Description	This Year 2020	Last Year 2019
Sugarfoot Stomp Membership	21	31
Events Sugarfoot Stomp Organised with Live Music	1	5
Events Sugarfoot Stomp Organised with DJ Music	7	6
Events managed by other organisations that involve Sugarfoot Stomp	2	2
Dance Festivals organised by Sugarfoot Stomp	0	1 Made up of 7 Events
Member Meet-Ups	0	3

Keeping It All Running

Description	This Year 2020	Last Year 2019
Board Meetings	3	6
Code of Conduct Committee Meetings	0	1
Working Bees	1	5
SFS Taskforce	0	1

A group of people, including men and women, are sitting on the floor in a circle, engaged in a discussion or meeting. The image is overlaid with a blue tint.

Statement of Receipts and Payments

How was it funded?

What did it cost?

For the year ending 31st December 2020

Operating Receipts

	Actual This Year (\$)	Actual Last Year (\$)
Donations, fundraising and other similar receipts	150.00	492.20
Fees, subscriptions and other receipts from members	4,563.02	799.96
Receipts from providing goods or services	11,152.91	21,724.40
Interest, dividends and other investment income receipts	0.09	0.09
Other operating receipts	0.00	3,438.52

Total Operating Receipts

15,866.02

26,455.17

Operating Payments

	Actual This Year (\$)	Actual Last Year (\$)
Payments related to public fundraising	0.00	0.00
Volunteer and employee related payments	0.00	0.00
Payments related to providing goods or services	17,551.31	18,925.14
Grants and donations paid	50.00	0.00
Other operating payments	2,483.84	1,071.38

Total Operating Payments

20,085.15

19,996.52

Operating Surplus or (Deficit)

(4,219.13)

6,458.65

For the year ending 31st December 2020

Capital Receipts

	Actual This Year (\$)	Actual Last Year (\$)
Receipts from the sale of resources	n/a	n/a
Receipts from borrowings	n/a	n/a

Capital Payments

	Actual This Year (\$)	Actual Last Year (\$)
Purchase of resources	n/a	n/a
Repayments of borrowings	n/a	n/a

End of Financial Year Position

	Actual This Year (\$)	Actual Last Year (\$)
Increase/(Decrease) in Bank Accounts and Cash	n/a	n/a
Bank accounts and cash at the beginning of the financial year	9,684.44	6,226.00
Bank Accounts and Cash at the End of the Financial Year	4,590.49	9,684.44

Represented By

• Cheque account	4,590.40	8,909.35
• Savings account	0.09	0.09
• Term Deposit account	0.00	0.00
• Cash Floats	0.00	0.00
• Petty Cash	0.00	55.00
• Cash on hand- G & S waiting to be banked	0.00	720.00

Total Bank Accounts and Cash at the End of the Financial Year	4,590.49	9,684.44
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"I can see the passion. Definitely bring competition to Wellington dance community. Moderate competition makes the community healthier."

Feedback from the Sugarfoot Stomp Annual Community Survey 2020



Statement of Resources and Commitments

What the entity owns?
What the entity owes?

For the year ending 31st December 2020

Schedule of Resources

	This Year (\$)	Last Year (\$)
Bank Accounts and Cash (from Statement of Receipts and Payments)	4,590.49	9,684.44
Money Held on Behalf of Others		
<i>Description</i>	0.00	0.00
Money Owed to the Entity		
<ul style="list-style-type: none"> • Receipts due as a result of providing goods and services 	0.00	1,363.00
Other Resources		
Description and Source of Value (cost or current value required if practicable to obtain)	0.00	0.00

Schedule of Commitments

	This Year (\$)	Last Year (\$)
Money Payable by the Entity		
<ul style="list-style-type: none"> • Unpaid invoices for payments for goods or services 	0.00	6,722.54
Other Commitments		
<i>Description</i>	0.00	0.00
Guarantees		
<i>Description</i>	0.00	0.00

Schedule of other Information

Grants or Donations with Conditions Attached (where conditions not fully met at balance date)	0.00	0.00
Resources Used as Security for Borrowings	0.00	0.00



Notes to the Performance Report

What other information supports our
performance report?

Note 1: Accounting Policies "How did we do our accounting"

Basis of Preparation

Sugarfoot Stomp is permitted by law to apply PBE SFR-C (NFP) Public Benefit Entity Simple Format Reporting - Cash (Not-For-Profit) and has elected to do so. All transactions are reported in the Statement of Receipts and Payments and related Notes to the Performance Report on a cash basis.

This Performance Report for Sugarfoot Stomp was prepared by Board Member and Treasurer, Amy Burt.

Goods and Services Tax (GST)

Sugarfoot Stomp is not registered for GST. Therefore amounts recorded in the Performance Report are inclusive of GST (if any).

Peer Review of Accounts

As stated in the Sugarfoot Stomp constitution, these accounts were peer reviewed by Carleen Pimm on Tuesday 2 February 2021.

FINANCIAL REPORT - PEER REVIEW STATEMENT

To the members of the Sugarfoot Stomp Incorporated.

I have peer reviewed the financial statements supplied by the treasurer. The financial report provides information about the past financial performance of the Sugarfoot Stomp Incorporated and its financial position as at 31st December 2020.

The Treasurer's Responsibilities

The Treasurer is responsible for the preparation of a financial report which fairly reflects the financial position of the Sugarfoot Stomp Incorporated as at 31st December 2020.

Peer Reviewer's Responsibilities

It is my responsibility to express an independent opinion on the financial report presented by the Treasurer Sugarfoot Stomp Incorporated and report to you.

Basis of Opinion

A review includes examining, on a test basis, evidence relevant to the amounts and disclosures in the financial report. It also included assessing:

- whether the accounting policies are appropriate to the Club's circumstances, consistently applied and adequately disclosed.

I conducted my review in accordance with generally accepted auditing standards in New Zealand. I planned and performed my review to obtain all the information and explanations which I considered necessary in order to provide me with sufficient evidence to give reasonable assurance that the financial report is free from material misstatements, whether caused by fraud or error. In forming my opinion, I also evaluated the overall adequacy of the presentation of the information in the financial report.

Unqualified Opinion

In my opinion the financial statements presented by the Treasurer comply with generally accepted accounting practice in New Zealand and give a true and fair view of the financial position of the Sugarfoot Stomp Incorporated, and its financial performance for the year then ended.

My peer review report was completed 02 February 2021 and my unqualified opinion is expressed as at that date.



Carleen Pimm

Past National Editor Mercedes-Benz Club New Zealand
 Past National Treasurer Mercedes-Benz Club New Zealand
 Past Treasurer Mercedes-Benz Club Canterbury.

Note 2 : Analysis of Receipts "How was it funded?"

For the year ending 31st December 2020

Receipt Item

	This Year (\$)	Last Year (\$)
Fundraising Receipts		
• Newtown Festival Performance	150.00	n/a
Fees, subscriptions and other receipts from members		
• Dance Practice- Members	252.00	n/a
• Dance Troupe Practice- Members	1,026.00	n/a
• Member Subscriptions	610.00	n/a
• Merchandise- Members	100.00	n/a
• Sales- Members	2,165.00	n/a
• Tickets- Members	410.00	n/a
Sub-Total	4,563.00	n/a
Receipts from providing goods or services		
• Dance Practice- Non-Members	175.00	n/a
• Dance Troupe Practice- Non-Members	628.00	n/a
• Merchandise- Non-Members	20.00	n/a
• Other Revenue	720.00	n/a
• Sales- Non-Members	8,615.00	n/a
• Tickets- Non-Members	995.00	n/a
Sub-Total	11,153.00	n/a
Interest, dividends and other investment income receipts		
• Savings Account	0.09	n/a

Note 3 : Analysis of Payments "What did it cost?"

For the year ending 31st December 2020

Payment Item

	This Year (\$)	Last Year (\$)
Payments related to providing goods or services		
• Catering	(131.00)	n/a
• Cost of Goods Sold	756.00	n/a
• Musician Fees	5,600.00	n/a
• Teaching Fees	4,428.00	n/a
• Venue Hireage	6,898.00	n/a
Sub-Total	17,551.00	n/a
Grants and donations paid		
• Tramways Museum Donation	50.00	n/a
Other operating payments		
• Advertising	237.00	n/a
• Cash Float	115.00	n/a
• General Expenses	645.00	n/a
• Printing & Stationery	45.00	n/a
• Subscriptions	1,441.00	n/a
Sub-Total	2,483.00	n/a

Report of Cash Stolen

Sugarfoot Stomp suffered the unfortunate theft of the class takings plus the cash floats for the end of block 3 on Tuesday 15th September 2020.

Here is a summary of the \$500.00 cash stolen:

Classes

- Learn to Swing Dance Newtown \$90.00
- Intermediate Lindy Hop Newtown \$70.00
- Learn to Swing Dance Cuba \$130.00

Cash Floats

- Float for Newtown x2 Classes \$140
- Float for Cuba Street x1 Class \$70

As it was the end of the block, the classes coordinator had collected the money on the Monday and was keeping it overnight in order to pass onto the Treasurer on Wednesday following the learn to swing dance class. The Treasurer would have banked it on Saturday following the normal processes of Sugarfoot Stomp.

As a result, the floats have been reduced from \$70 per class to \$50 per class and extra information about the precautions to keep floats safe was emailed out to teachers before the start of the new teaching block.

Sugarfoot Stomp will also continue to encourage contactless payment straight into the bank account for added security.

Note 2 & Note 3

Due to Xero being incorrectly set up (see **Sugarfoot Stomp Financial Report and Strategy 2020/2021/2022/2023** in the next section for more explanation), the breakdown of the figures for 2019 are not available for reporting. They are marked with a n/a.

Use of Xero

After Xero was corrected, (see **Sugarfoot Stomp Financial Report and Strategy 2020/2021/2022/2023** in additional information for the full explanation) the final profit and loss figures needed to be manually adjusted to take into account a small GST component on some figures. For some early 2020 invoices and bills on Xero, GST had been added and was unable to be changed.

Therefore, the profit and loss figures produced on Xero for the 2020 financial year will appear slightly differently to the figures in this report.

Please note that the figures in this report are the correct ones.

There is also 0.09 in the savings account that was manually added on and will not appear on the profit and loss in Xero.

Additional Information

Sugarfoot Stomp Financial Report and Strategy 2020/2021/2022/2023

Due to the early departure of the 2019 Treasurers in November and December 2019, the Board had to call on an experienced community volunteer, Maxine Burt, to prepare the Financial Statement for the 2019/2020 AGM in February 2020. In the Financial Statement there was an indication by Mrs Burt that Xero (Sugarfoot Stomp's Accounting software) had several issues that needed attending to. Here is an excerpt from the performance notes:

"I was given access to the Society Xero account however on examination found that a lot of transactions had not been reconciled to produce the figures needed for the end of year financials. I understand the Board needs to make decisions around who is doing the bookkeeping moving forward.

My brief look at the Xero account showed me that although I am given to understand the society is not registered for GST, Tax Invoices with a GST component have been issued by the Society. In my opinion this is not correct practice and needs to be changed moving forward.

If you are going to use the Bills area, any bills you create can only have a GST exclusive bill if the Supplier is registered for GST and the original invoice reflects it.

Xero is a good way of keeping everything together in one place and a great application. To be an effective tool for the Board when looking at the financial position of the Society during the year and producing the essential end of year figures, it needs to be used correctly and updated frequently as the bank feed arrives into it. It is costing you annually \$621.00 so it is worth using properly.

So without the use of Xero, to help prepare something for the AGM, I requested and was given the following information:..."

Amy Burt, one of the new treasurers for 2020, took on the job of investigating Sugarfoot Stomp's financial processes and position. This included the task of sorting out Xero. **Amy Burt and Steph Fairless produced the Sugarfoot Stomp Financial Report and Strategy on Sunday 19th July 2020 and it was subsequently presented, motioned, and approved by the Board at the Board Meeting #2 on Sunday 15th August.**

Below is a series of excerpts from the Financial Report and Strategy to highlight the faults, remedies and strategy for going forward to ensure the protection and survival of Sugarfoot Stomp.

The investigations revealed the following (pg 12 & 13):

Summary of identified Faults

- *Tarrant bills for studio hire not paid for nearly all of 2019- Amy had to email to inquire and sort all payments in early 2020.*
- *Teacher Invoices not paid for the November / December period of 2019*
- *Summer Hop 2019 Budget and Ticket prices did not match resulting in a crippling financial loss*
- *No accurate records of profit / loss could be found for 2019*
- *Automated processes on Zoho class management system that did not connect to Xero*
- *Bills kept in draft in Xero from August 2019*
- *Many Invoices remained in draft on Xero and not followed up. These were mostly linked to ticketing platforms and had been automated. (Lil-Reggie for Summer Hop and Eventbrite for Sunday Social: Winter Warmer) These had NOT been reconciled or checked since August 2019.*
- *Bulk payments and one off payment deposited into the Sugarfoot Stomp Bank account with no reference in the bank account of where the payment came from or what it was intended for. This includes coding for the accounts.*
- *Lump Sums of money transferred from a members personal bank account*
- *Missed invoices from Newtown for late 2019 OVERDUE*
- *Missed Invoices from Merchandise, Lil-Reggie in 2019 OVERDUE*
- *Stripe payments took an average of \$4 to \$5 out of each translation and was not accounted for in any budgets. E.G. Sugarfoot Stomp lost 60.00 of the total membership fees in 2019 and on EVERY TICKET TRANSACTION through Eventbrite and Lil Regie.*
- *Ticketing platforms were costing too much money and not put in the budget. There is no record on the 'extra costs' they take from the tickets.*
- *Workshop and Class payments for individuals not followed up and no evidence found for this*
- *Easily accessible records for workshop and class payments not kept*
- *Flaws in the Zoho system for class management check in and no way to troubleshoot for fixing it*
- *Invoices, Reimbursements and Bills on Xero were made for GST when Sugarfoot Stomp is not registered for GST*
- *Xero not used as it should have been leading to financial records being confused*
- *Treasury google drive connected off the 'hello' account with little to no sorting of the invoices sent there automatically. Double ups in the invoices kept in the file. Nothing was categorised e.g. invoices received, sent etc...*

To remedy the situation mentioned above Amy Burt, as part of the Treasury role and responsibilities, actioned the following practices to sort out the finances to enable Sugarfoot Stomp to move forward. The following excerpts comes from pg 14, 15, 16 & 17 of the Sugarfoot Stomp Financial Report and Strategy.

2020 ACTIONS

These actions have been put in place to try and remedy the current situation after Board Meeting #1 2020. The actions that have been put in place has shed light on the actual financial situation of Sugarfoot Stomp, prompting the formation of this financial strategy. It also serves as a record to ensure the same mistakes are not repeated and the Board can move forward with confidence with the decisions they are making to sustain Sugarfoot Stomp.

- Class and Event Planning documents created by Amy Burt in January 2020 to help guide members to plan for classes and events that break even or make a profit. On Sugarfoot Stomp Information Portal for members only. They gain access once signing up as a member. Budget templates are also provided with projected budgets to aid planning. Event Management Link to Google Site (Sugarfoot Stomp Information Portal)
Dance Workshop Management Link to Google Site (Sugarfoot Stomp Information Portal)
The Information Portal was Presented at AGM 2019/2020, motioned and carried unanimously.

- Maxine Burt prepared the financial statement at the request of the Board in late January / Early February 2020 due to the absence of the 2019 Treasurers. Her report to the AGM highlights recommendations for managing the finances- especially the fixing and managing of Xero.

- Google Suite (Google Forms and Sheets) has been utilised for the Membership Form, Class Registrations, Workshops and Ticketed Events. These are linked to the website directing traffic through there. This is working smoothly and everything is being tracked accurately.

- Treasury gmail address created (treasury@sugarfootstomp.co.nz)

- Treasury google drive has been sorted into folder categories for 2020.
2020 Class Management, 2020 Classes Booking Forms, 2020 Expense Claims, 2020 Invoices Received (+ subfolders for teacher invoices/block, venue invoices), 2020 Invoices Sent, 2020 Kiwibank Deposits (+ subfolders for each class / workshop / event), 2020 Receipts, 2020 Subscriptions, Kiwibank Application.

- Xero was fixed to enable it to function as the proper accounting system.

- Invoicing corrected to non-GST Invoices.

- All Items reconciled (150 approx. items reconciled in Xero from 2019)

- Draft bills switched to awaiting payment on Xero.

- Credit notes had to be given for 2019 invoices linked through ticketing platforms (Lil-Reggie for Summer Hop and Eventbrite for Sunday Social: Winter Warmer)

- Not using Lil-Regie or Eventbrite anymore- too expensive for our needs

- Invoices created for payments to Sugarfoot Stomp (not classes or workshops)

- Financial processes for Xero accounting system created in a 34 page document including how to code for each specific item.

- All overheads calculated for the year with a breakdown on what we need to earn each month to operate with these overheads.

- Credit Card Details for each platform changed and recorded

- Due dates for each overhead recorded

- Floats created for the x2 cash boxes- recorded and tracked on a spreadsheet

- Budget for 2021 has been developed

- New Board action so there is a treasury profit and loss report every 3 months, January to June (6 month) profit and loss summary and after each block of classes

- Steph Fairless organising the new signatories for Kiwibank and finding the process for changing them.

- Amy Burt meeting with new Board Member and Treasurer Steph Fairless after Board Meeting #1 2020 to show the emerging financial processes of Sugarfoot Stomp.

The 2020 Actions above reflected the 2-3 months of work over April and May 2020 by Amy Burt to get a clear picture of where Sugarfoot Stomp is as an organisation.

This has provided a clear picture of what our financial strategy needs to be for 2020 / 2021 / 2022 / 2023.

Special Note

- There is still investigation for liability insurances which if needed will be an extra cost to fund.

- There is still investigation for insurance into assets.

- There is still investigation into how donating operates for charities with IRD and Xero.

On the next page there is a summary table of the 2020 financial action summary.

Additional Information

2020 Financial Action Summary

Action	Description
Xero	Accounting Software vital for our Annual Report to the Charities
Xero Document	34 Page document outlining the process for operating Xero This includes categorising items and accounting
2020 Sugarfoot Stomp Finance Overview	<p>Document Spreadsheet Outlining</p> <ul style="list-style-type: none"> - Overheads for 2020 - Budget for 2021 - Cash box calculations for the floats <p>Reporting to the Board</p> <ul style="list-style-type: none"> • Every 3 Months • After Each Block <p>Block 1 Income Summary Block 2a Income Summary Block 2 Income Summary Block 3 Income Summary Block 4 Income Summary Block 5 Income Summary</p> <p>Jan - March Outgoings April - June Outgoings July - September Outgoings October - December Outgoings</p>
Membership	Google form linked on website for Membership
Membership	INVOICE ON XERO- pay via bank
Classes / Workshops	Google form linked on website for class registration
Classes / Workshops	Google Sheet linked to classes / workshops check in sheet for the block
Classes / Workshops	NO INVOICE ON XERO- pay via bank / cash
Events	Google form linked on website for tickets
Events	Google Sheet for invoicing for tickets
Events	INVOICE ON XERO- pay via bank
Disclaimer / Terms & Conditions	Developed on the website to make financial transactions transparent.

*Table from Sugarfoot Stomp Financial Report and Strategy 2020 pg 16

The financial report comprehensively covers the Treasurers actions to ascertain Sugarfoot Stomp's financial position in order to start planning for the future. The next part of the report covers the strategy needed to move Sugarfoot Stomp towards financial sustainability in the future. The following concludes the excerpts comes from pg 18 & 19 of the Sugarfoot Stomp Financial Report and Strategy.

STRATEGY

What are Sugarfoot Stomp's Financial Goals?

Towards 2023 Financial Goals

Bank Account Minimum	Operating Costs Between	Beyond 2023 grow to having between
\$10,000	\$10,000 and \$15,000	\$15,000 and \$20,000

This minimum bank account fund of \$10,000 will allow emergency costs that arise for Sugarfoot Stomp to be met comfortably. The Charities Services recommended that finances and risk management are the priorities for running a charity. They strongly advised to have a 'buffer' of money in the bank to avoid closure due to the potential economic uncertainty caused by COVID-19. This is also sensible financial practice.

Looking at these numbers, strategic planning for all classes, workshops and events from 2020 onwards will have to be strictly adhered to. The guidelines are on the Sugarfoot Stomp Information Portal (mentioned above) and included sending proposals to the Board.

Processes written by the Board are expected to be carried out by people in the positions of responsibility. Close scrutiny by the treasurers will be carried out for every financial transaction.

STRATEGY

How will we raise the money?

We must refer to the Sugarfoot Stomp Business Plan 2020 for strategy goals and aims to inform our decision making. This was voted on and accepted at the 2019/2020 AGM as our plan that must be followed in 2020. There will need to be some amendments to the events that pose a financial risk.

The main goal was to grow Sugarfoot Stomp at a 'grassroots level' in terms of finding our own community.

- *As a minimum running x2-3 classes per 6 week block at studios with reasonable costs*
- *Profit share with teachers (NO MINIMUM PAYMENT)*
- *Following the 3 P's for class and workshop planning
Planning / Price / Promotion
Draft Document Link Here:
Sugarfoot Stomp Classes / Workshop Process 2020*
- *Running various workshops on easy to learn routines*

- *Local community run Dance Events that break even or make a profit*

- *More members joining Sugarfoot Stomp*

- *Performances where 100% of proceeds go back to Sugarfoot Stomp*

- *Investigate Donations*

- *Increase Membership Fees*

Important Membership Note

Sugarfoot Stomp must have 15 paid members to qualify as an Incorporated Society. Any less than 15 members and we will be de-registered and lose our charitable status.

The treasury recommends a small fee increase of \$5 to annual membership fees in 2021 with an intention to increase this rate every year.

Membership fees pay for the operation of an Incorporated Society. There is an unbalance in Sugarfoot Stomp where our standard operating costs are higher than our yearly membership fee intake.

Due to Summer Hop making a financial loss in 2019, the financial position of Sugarfoot Stomp, along with the COVID-19 global pandemic, the Treasury strongly recommended that Summer Hop not go ahead for 2020/2021 and subsequent years.

Instead, focus on small, local events that will produce a break-even scenario or show a small profit.

While setting up new operating processes as mentioned in detail above, the Treasury did their best to ascertain figures to keep the Board informed of the financial position throughout 2020. These figures are from pg 20 of the Sugarfoot Stomp Financial Report and Strategy and show where the society was approximately at the 6 month point.

....This decision is based on the 2020 6 month January to June profit and loss summary presented as evidence to support this document.

The numbers show a LOSS OF \$5,374.78 in 6 months. This leaves approx. \$2,900 in the bank account. Sugarfoot Stomp's minimum yearly overheads for 2020 are approx. \$1,806.14 (based on the exchange rate we could be seeing upwards of \$2,000).

The 2021 Budget (unapproved) is looking at approx. \$2,753.11 of operating costs.

With the loss of \$5,374.78 the past 6 months, a projected 2021 operating cost of \$2,753.11 per year and approx. \$2,900 currently (July) in the bank account the numbers paint a really clear picture of where Sugarfoot Stomp is financially at.

The Treasury recommends that Summer Hop or any significant events be put on pause for 2020 and 2021 and operate in the alternative years to PCX in Christchurch in order to attract more individuals.

Additional Information

Moving Forward

The treasurers are now confident they have an efficient, robust system that will accurately track the finances of Sugarfoot Stomp. Along with regular reporting of figures to the Board and a close budget they also have a breakdown to raise the savings money needed in the bank account.

This system has already proved to have merit as it has reduced the deficit by over \$1,000 in 6 months.

6 Month Financial Loss 2020 (Approx.)	2020 End of Financial Year Loss	Reduction of the loss over 6 months
-\$5,374.78	-\$4,219.13	\$1,155.65

The biggest need moving forward is for all Board members and members to understand the need for frugality and for members to help in generating income with no losses to meet the 2021 overheads.

The 2020 deficit in the profit and loss figures are due to the 2019 faults as mentioned in this additional information more than any effects of the COVID-19 global pandemic.

Lastly, page 21 of the Sugarfoot Stomp Financial Report and Strategy 2020 sums up the position of the society as recommended by the Treasurers.

The Treasury has been very clear in the strategy needed for the building of funds and survival of Sugarfoot Stomp over the time period of 2020-2023.

This gives Sugarfoot Stomp the time needed to focus on building funds in order to meet the \$10,000 safety threshold first before risking the finances in another swing dance event of 2 days or more.

It will also give Sugarfoot Stomp time to build up their dance community, gain strength in our membership numbers and continue to raise our profile. This is in our business plan for 2020, to build up our community at a grassroots level.

The current COVID-19 crisis has put many parts of the world on hold, along with the economic struggles to follow.

The Treasury wants to put Sugarfoot Stomp in a strong financial position as the risk of more waves of the infection is a reality we have to plan for.

The treasury will reassess Sugarfoot Stomp's financial position in early 2022 in the running of Summer Hop for later that year or towards 2023.

This Sugarfoot Stomp Financial Report and Strategy 2020 / 2021 / 2022 / 2023 has been approved By Amy Burt and Steph Fairless on Sunday 19 July 2020.

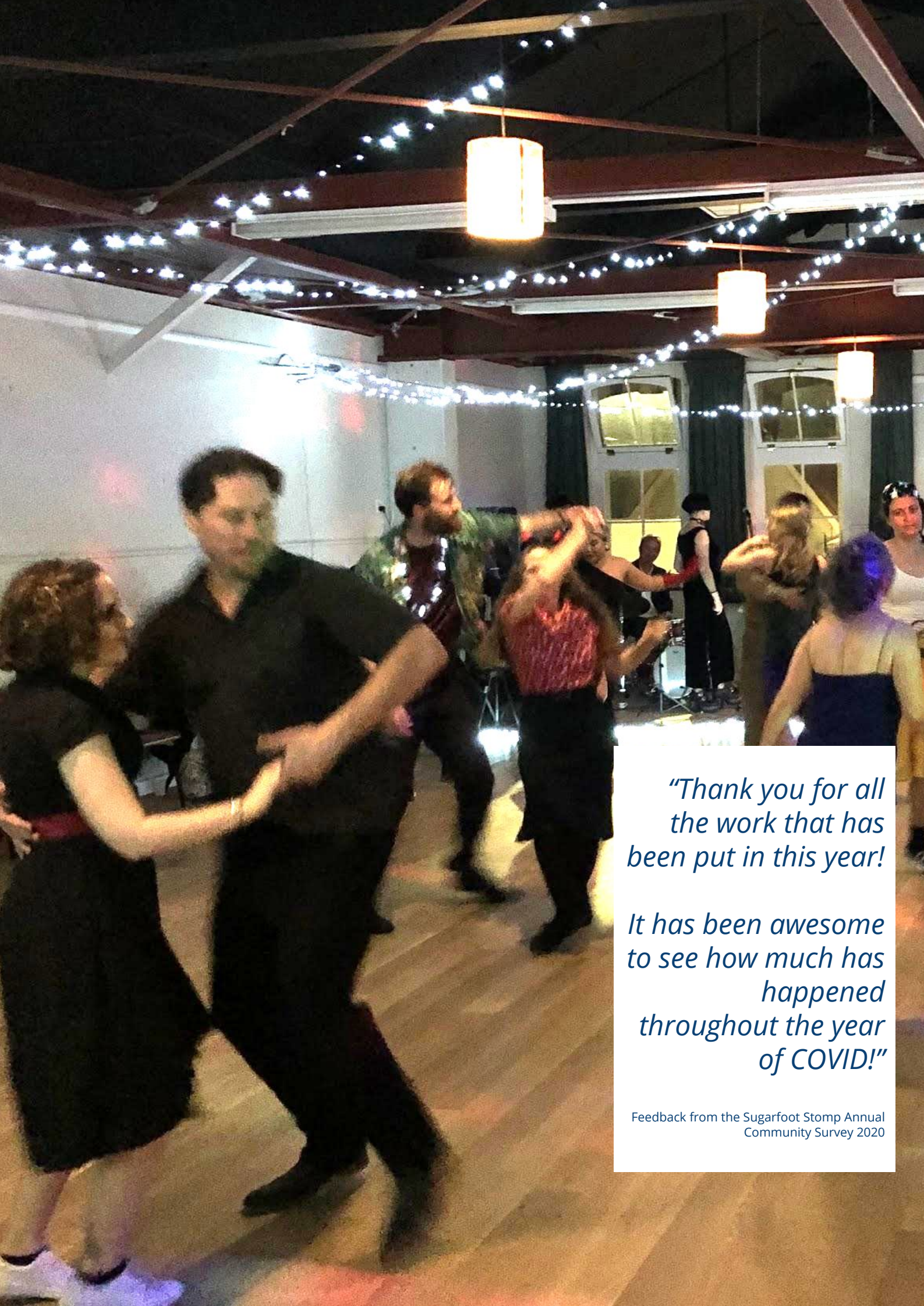
Member and Non-Member Receipts

In addition, the 2020 Treasurers also learned that all member payments needed to be coded separately on Xero, so went back and rechecked and re coded all member and non-member payments to ensure accurate reporting as dictated by the Tier 4 standards.

The separation of member and non-member receipts has not been done since Sugarfoot Stomp was established in 2018.

2020 is the first year that member and non-member receipts have been reported accurately.

This concludes the additional information



*"Thank you for all
the work that has
been put in this year!*

*It has been awesome
to see how much has
happened
throughout the year
of COVID!"*


Feedback from the Sugarfoot Stomp Annual
Community Survey 2020

This Performance Report has been approved by the Board, for and on behalf of Sugarfoot Stomp:

Date: 27/2/2021

Date: 21/2/2020

Signature: 

Signature: 

Name: Hamish Cameron

Name: Steph Fairless

Position: Board Member

Position: Board Member



Sugarfoot Stomp
Performance Report
2020

