



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 3 August 2017 (Period start date) **To** 31 August 2018 (Period end date)

Charity name: The Oscar Romero Award Trust

Charity registration number: 1174108

Objectives and Activities

| | SORP reference | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Summary of the purposes of the charity as set out in its governing document | Para 1.17 | To advance the Catholic faith for the benefit of the public in accordance with the teachings of St. Archbishop Oscar Romero by encouraging the understanding and practice of that faith as it applies to the equitable relief of spiritual, moral and material poverty by use of an accredited award system in Catholic education institutions. |
| 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 | Continuing feasibility phase of the award and initial assessment of trial schools. Preparation of major grant application to allow trustees strategy to be delivered |
| 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 full regard for the Charity Commission guidance on public benefit, the increase in understanding of Catholic social justice is of wide societal benefit. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | SORP reference | |
|------------------------------------------------------------------|----------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Policy on grant making | Para 1.38 | The charity does not have resources to make grants |
| Policy on social investment including program related investment | Para 1.38 | The charity does not hold investments |
| Contribution made by volunteers | Para 1.38 | The charity relies on volunteer support, presently the Coordinator and two assessment volunteers. Total hours in the year about 100 hours. |

| | | |
|-------|--|--|
| 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>During the year the charity has assessed or advised 18 schools on the requirement to be awarded participator level of the award, which is the lowest level of 3.</p> <p>Schools have reported that the lead into assessment has significantly improved their students' understanding of the tenets of Catholic social justice. This has led to fundraising for charity in the schools and participation in local community activities in the schools.</p> <p>This awareness has also spread to teaching and governance personnel to significant improvement.</p> |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|--------------------------------------------------------------|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Achievements against objectives set | Para 1.41 | This is first year of operation, achievements against trustee aims has been satisfactory, with activity limited by financial support. A recent notification of a major grant in the next financial year will accelerate activity. |
| Performance of fundraising activities against objectives set | Para 1.41 | None |
| Investment performance against objectives | Para 1.41 | None held |
| Other | | |

Financial Review

| | | |
|----------------------------------------------------------------------------------|-----------|------------------------------------------------------------------------------------|
| Review of the charity's financial position at the end of the period | Para 1.21 | A positive carried forward figure of £594.44 will allow basic activity to FY18/19. |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | None significant |
| Amount of reserves held | Para 1.22 | £594.44 |
| Reasons for holding zero reserves | Para 1.22 | NA |
| Details of fund materially in deficit | Para 1.24 | None |
| Explanation of any uncertainties about the charity continuing as a going concern | Para 1.23 | None |

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 | Grants and Registration fees |
| Investment policy and objectives including any social investment policy adopted | Para 1.46 | None |
| A description of the principal risks facing the charity | Para 1.46 | No success with grant applications. Lack of sign-up by schools. |
| Other | | |

Structure, Governance and Management

| | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------------------------------------------------------|
| Description of charity's trusts: | | |
| Type of governing document (trust deed, royal charter) | Para 1.25 | CIO constitution |
| How is the charity constituted? (e.g unincorporated association, CIO) | Para 1.25 | CIO |
| 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 | By skills, knowledge and experience by sitting trustees. |

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 | Briefing by Coordinator and Chair |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | Simple structure, Coordinator direct report to trustees. Charity links into Catholic Schools through Diocese of Portsmouth. |
| Relationship with any related parties | Para 1.51 | NA |
| Other | | |

Reference and Administrative details

| | |
|-----------------------------|---------------------------------------------------------------------------------------------------------------|
| Charity name | The Oscar Romero Award Trust |
| Other name the charity uses | ORAT |
| Registered charity number | 1174108 |
| Charity's principal address | Oaklands Catholic School and Sixth Form College, Stakes Hill Road, Waterlooville – Hampshire PO7 7BW |
| | |

Names of the charity trustees who manage the charity

| | Trustee name | Office (if any) | Dates acted if not for whole year | Name of person (or body) entitled to appoint trustee (if any) |
|---|------------------------------------|-----------------|-----------------------------------|---------------------------------------------------------------|
| 1 | Captain Paul Quinn OBE RN (Rtd) | Chair | | Trustees themselves and Coordinator |
| 2 | Matthew Quinn | | | Trustees themselves and Coordinator |
| 3 | Right Rev Bishop John Hine | | | Trustees themselves and Coordinator |
| 4 | Denise Mitchell | | | Trustees themselves and Coordinator |
| 5 | Mike Castelli | | | Trustees themselves and Coordinator |

Corporate trustees – names of the directors at the date the report was approved

| Director name | | |
|---------------|--|--|
| None | | |
| | | |

Name of trustees holding title to property belonging to the charity

| Trustee name | Dates acted if not for whole year | |
|--------------|-----------------------------------|--|
| None | | |
| | | |

Funds held as custodian trustees on behalf of others

| | |
|-------------------------------------------------------------------------------------------------------------------------------|------|
| Description of the assets held in this capacity | None |
| Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects | NA |
| Details of arrangements for safe custody and segregation of such assets from the charity's own assets | NA |

Additional information (optional)

Names and addresses of advisers (Optional information)

| Type of adviser | Name | Address |
|-----------------|------|---------|
| None | | |

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

| |
|--------------------|
| Peter Mugeni Sumba |
|--------------------|

Exemptions from disclosure

Reason for non-disclosure of key personnel details

NA



Other optional information

NA

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) | Paul Quinn | Kay Hopkins |
| Position (eg Secretary, Chair, etc) | Chair | Secretary |
| Date | 19 March 2019 | |

Oscar Romero Award Trust

Statement of Financial Activities for the Year Ended 31st August 2018

| | Note | Restricted Funds £ | Endowment Funds £ | Total Funds 2018 £ | 2017 £ |
|------------------------------------------------|----------|--------------------------|-------------------------|--------------------------|-----------|
| INCOME AND ENDOWMENTS FROM: | 2 | | | | |
| Donations and Legacies | | 3067.66 | 0 | 3067.66 | 0 |
| Charitable Activities | | 100 | 0 | 100 | 0 |
| Other Income | | 0 | 0 | 0 | 0 |
| Investments | | 0 | 0 | 0 | 0 |
| TOTAL INCOME | | 3167.66 | 0 | 3167.66 | 0 |
| EXPENDITURE ON: | 3 | | | | |
| Charitable Activities | | 2573.22 | 0 | 2573.22 | 0 |
| Other Expenditure | | 0 | 0 | 0 | 0 |
| TOTAL EXPENDITURE | | 2573.22 | 0 | 2573.22 | 0 |
| Net Movement in Funds | | 594.44 | 0 | 594.44 | 0 |
| Balances brought forward at 1st September 2017 | | 0 | 0 | 0 | 0 |
| Balances carried forward at 31st August 2018 | | 594.44 | 0 | 594.44 | 0 |

Balance Sheet as at 31st August 2018

| | Note | 2018 £ | 2017 |
|-----------------------------------------------|------|-----------|------|
| Fixed Assets | | | |
| Tangible Fixed assets | | 0 | 0 |
| Investment assets | | 0 | 0 |
| | | 0 | 0 |
| Current Assets | | | |
| Stock | | 0 | 0 |
| Debtors and Prepayments | 4 | 1167.66 | 0 |
| Short Term Deposits | 5 | 0 | 0 |
| Cash at bank and in hand | 6 | 2000 | 0 |
| Loan | 7 | | 0 |
| | | 3167.66 | 0 |
| Liabilities: Amounts Falling Due Within One Y | 8 | 2573.22 | 0 |
| Net Current Assets | 9 | 5740.88 | 0 |
| Net Assets | | 5740.88 | 0 |
| Funds | | | |
| Restricted | | 594.44 | 0 |
| Endowment | | 0 | 0 |

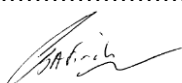
594.44 0

Approved by the Trustees and signed on its behalf by

Paul Quinn
Chair



Tim Finch
Accounting Officer



Dated 19-Mar-19

Statement of Financial Activities for the Year Ended 31st August 2018

| 2 Incoming Resources | Restricted Funds | Endowment Funds | Total Funds | 2018 | 2017 |
|--------------------------------------------|-------------------------|------------------------|--------------------|-------------|-------------|
| | £ | £ | £ | | |
| Donations, Grants and Contributions | | | | | |
| Donations | 67.66 | 0 | 67.66 | 0 | |
| Grants | 3000 | | 3000 | 0 | |
| Sub Total | 3067.66 | 0 | 3067.66 | 0 | |
| Income from Charitable Activities | | | | | |
| Contributions | 100 | 0 | 100 | 0 | |
| Sub Total | 100 | 0 | 100 | 0 | |
| Income Tax recoverable | 0 | 0 | 0 | 0 | |
| Investment Income | | | | | |
| Bank and Deposit Account Interest | 0 | 0 | 0 | 0 | |
| Sub Total | 0 | 0 | 0 | 0 | |
| Total Incoming Resources | 3167.66 | 0 | 3167.66 | 0 | |

| 3 Resources Expended | Restricted Funds | Endowment Funds | Total Funds | 2018 | 2017 |
|--------------------------------------------------|-------------------------|------------------------|--------------------|-------------|-------------|
| | £ | £ | £ | | |
| Website Setup and Annual Support and Maintenance | 2400 | 0 | 2400 | 0 | |
| Hospitality | 29.62 | 0 | 29.62 | 0 | |
| Travel Expenses | 143.6 | 0 | 143.6 | 0 | |
| Total Resources Expended | 2573.22 | 0 | 2573.22 | 0 | |

| 4 Debtors | | 2018 | 2017 |
|-----------------------------------------------|----------|-------------|-------------|
| | £ | | |
| Edith Stein Catholic Academy Trust | | 1067.66 | 0 |
| Oaklands Catholic School & Sixth Form College | | 100 | 0 |
| Sub Total | | 1167.66 | 0 |

| 5 Short Term Deposits | | 2018 | 2017 |
|------------------------------|----------|-------------|-------------|
| | £ | | |
| | | 0 | 0 |
| Sub Total | | 0 | 0 |

| 6 Cash at Bank | | 2018 | 2017 |
|-----------------------|--|-------------|-------------|
|-----------------------|--|-------------|-------------|

| | | | |
|------------------------|---|------|---|
| | £ | | |
| Lloyds Current Account | | 2000 | 0 |
| Sub Total | | 2000 | 0 |

7 Liabilities: Amounts Falling Due Within One Year

2018 2017

£

Creditors

| | | | |
|------------------------------------|--|---------|---|
| Edith Stein Catholic Academy Trust | | 2573.22 | 0 |
| Sub Total | | 2573.22 | 0 |

8 Analysis of Net Assets By Fund

| | Restricted Funds | Endowment Funds | Total Funds | | |
|---------------------|---------------------|--------------------|-------------|------|------|
| | | | | 2018 | 2017 |
| | £ | £ | £ | | |
| Current assets | 3167.66 | 0 | 3167.66 | | 0 |
| Current liabilities | 2573.22 | 0 | 2573.22 | | 0 |
| | 594.44 | 0 | 594.44 | | 0 |