

| Trustees' Annual Report for the period |                   |    |      |    |                 |    |
|--|-------------------|----|------|----|-----------------|----|
| From                                   | Period start date |    |      | To | Period end date |    |
|  | 06                | 04 | 2021 |    | 05              | 04 |

## Section A Reference and administration details

|   |   |
|---|---|
| <b>Charity name</b>                       | The Greek Orthodox Community of the Holy Trinity, Oxford                  |
| <b>Other names charity is known by</b>    | Greek Parish Oxford / Holy Trinity Greek Orthodox Parish                  |
| <b>Registered charity number (if any)</b> | 1011772   |
| <b>Charity's principal address</b>        | Orthodox Church<br>1 Canterbury Road<br>Oxford<br><b>Postcode</b> OX2 6LU |

### 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  | Theodoros Bargiotas      |                              | 06.04.2021 to 29.05.2022          |   |
| 2  | Christos P Kotandis      | Secretary (until 29.05.2022) | 06.04.2021 to 29.05.2022          |   |
| 3  | Petros Kitromilides      |                              | 06.04.2021 to 29.05.2022          |   |
| 4  | Yannis Apostolou         |                              | 06.04.2021 to 29.05.2022          |   |
| 5  | Joanna Pavelin           |                              | 06.04.2021 to 29.05.2022          |   |
| 6  | Ann Lingas               | Acting President             |                                   |   |
| 7  | Ioanna Christodoulou     | Secretary (from 29.05.2022)  |                                   |   |
| 8  | George Philip Atzemoglou | Treasurer                    |                                   |   |
| 9  | Andrew Goeldner-Thompson |                              |                                   |   |
| 10 | Dr Charles Foster        |                              |                                   |   |
| 11 | Dr Emmanouil Karteris    |                              |                                   |   |
| 12 | Dimitrios Zilaskos       |                              |                                   |   |
| 13 | Skev Antoniou            |                              | from 29.05.2022 onwards           |   |
| 14 | Zacharoula Dent          |                              | from 29.05.2022 onwards           |   |
| 15 | George Krasovitsky       |                              | from 29.05.2022 onwards           |   |
| 16 | Peter Petkoff            |                              | from 29.05.2022 onwards           |   |
| 17 | Jimmy Xiourouppas        |                              | from 29.05.2022 onwards           |   |

### Names of the trustees for the charity, if any, (for example, any custodian trustees)

| Name | Dates acted if not for whole year |
|------|-----------------------------------|
|      |                                   |
|      |                                   |

## Section B Structure, governance and management

### Description of the charity's trusts

Type of governing document  
(eg. trust deed, constitution)

Constitution, as amended on 30.01.2022

How the charity is constituted  
(eg. trust, association, company)

Registered charity; orthodox community

Trustee selection methods  
(eg. appointed by, elected by)

Elected for 2 years at AGM

### Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

Constitutional amendment to allow replacing resigned or deceased trustees.

## Section C Objectives and activities

### Summary of the objects of the charity set out in its governing document

The charity's objects are 1) to promote the Christian Orthodox faith according to the rites and traditions of the Greek Orthodox Church as preserved and taught by the Ecumenical Patriarchate of Constantinople. 2) to benefit the public in England and Wales and abroad and particularly the Greek Orthodox community by the relief of poverty, sickness and distress.

**Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)**

The principal activities were the promotion of the Christian Orthodox faith, the operation of the Greek School and benefitting the public in England and Wales and abroad, particularly the Greek Orthodox community, by the relief of poverty, sickness and distress.

The trustees have had due regard to the objectives of the charity as set out above, and also the guidance on public benefit published by the Charity Commission, in exercising their powers and duties.

**Additional details of objectives and activities (Optional information)**

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

**Summary of the main achievements of the charity during the year**

This year we began to emerge from under the shadow cast by Covid-19. Baptisms, weddings, and funerals including graveside services continued, along with confessions and home visits for communion and other reasons. Our service schedule moved closer to a normal pattern, and beginning in February 2022 we were able to meet in unrestricted numbers in church, celebrating a much fuller round of services through Lent, Holy Week and Easter. We remained grateful that no community members died during the Covid crisis, but also mourned lost family members and friends.

We worked to rebuild our group of volunteers as the parish undertook increased activities, with new people joining to help to sing, serve in the altar, at the candle desk, with cleaning the church, hosting coffee hours, sewing and cleaning linens, caring for the church building and more. Social gatherings were still very uncertain and suffered during several periods of quarantine, but the Auxiliary Association worked hard to make sure parish events took place when possible, consciously rebuilding our sense of community. We were not able to hold our usual fundraisers this year, but successfully ran a campaign to purchase an icon and garden bench in memory of Patricia Scott, a long-time member and friend to many. The Greek school continues with a healthy enrolment and has returned to in-person teaching, although continuing with some online activities. The school has a new Head Teacher, Litsa Politi, with funding for the post provided by the Greek Government.

Five members of the Parish Council announced that they will step down at the 2022 elections, including Theodoros Bargiotis our President of nearly 10 years and our Secretary Christos Kotanidis. A volunteer with excellent skills will also now manage all communications. Fr Ian moved into his own residence in January 2022, and the Council has made the decision to temporarily let the Parish House for the benefit of the Community, using a local property management company. In the process of researching the best use of the Parish House, it also became clear that our charity's governance structure would benefit from an update. We are therefore, with the knowledge of the Archdiocese, starting the process of becoming a Membership CIO (Charitable Incorporated Organisation), a newer charity template which is closest to our present structure.

Together with the Parish of the Annunciation (charity # 1122035), with which we share the use of our church, we collected funds during our 2021 Advent Collection in support of the SOS Children's Village, Ethiopia.

Together with the Parish of the Annunciation (charity # 1122035), with which we share the use of our church, we collected funds during Lent 2021 in support of the Shepherd's High School in Beit Sahour, Palestinian West Bank. During our 2022 Lent collection, in light of the war in Ukraine, we collected funds towards the DEC's emergency appeal for Ukraine Humanitarian Relief. The collection continued into the next financial year.

## Section E Financial review

**Brief statement of the charity's policy on reserves**

To maintain cash balances equivalent to at least 6 months of revenue expenditure.

**Details of any funds materially in deficit**

**Further financial review details (Optional information)**

You **may choose** to include additional information, where relevant about:



- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

## Section F Other optional information

## Section G Declaration

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

**Signed on behalf of the charity's trustees**

|  |   |   |
|--|---|---|
| <b>Signature(s)</b>                        |  |  |
| <b>Full name(s)</b>                        | Ann Lingas  | Dr Philip Atzemoglou  |
| <b>Position (eg Secretary, Chair, etc)</b> | Acting President  | Treasurer   |
| <b>Date</b>                                | 18/05/2023  |   |



# CHARITY COMMISSION FOR ENGLAND AND WALES

## Independent examiner's report on the accounts

### Section A

### Independent Examiner's Report

Report to the trustees/  
members of

Charity Name

The Greek Orthodox Community of the Holy Trinity, Oxford

On accounts for the year  
ended

5<sup>th</sup> April 2022

Charity no  
(if any)

1011772

Set out on pages

1 and 2

*(Remember to include the page numbers of additional pages.)*

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 05/04/2022.

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 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 which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

*\* Please delete the words in the brackets if they do not apply.*

Signed:

Peter J. Stevenson

Date:

02/05/2023

Name:

Peter J Stevenson

Relevant professional  
qualification(s) or body  
(if any):

FCA

Address:

8 Harbord Road

Oxford

OX2 8LJ



CHARITY COMMISSION  
FOR ENGLAND AND WALES

|  |             |
|--|-------------|
| Charity Name   | No (if any) |
| The Greek Orthodox Community Of The Holy Trinity, Oxford | 1011772     |

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## Receipts and payments accounts

|                     |                   |    |                 |
|---------------------|-------------------|----|-----------------|
| For the period from | Period start date | To | Period end date |
|                     | 06/04/2021        |    | 05/04/2022      |

### Section A Receipts and payments

|   | Unrestricted funds<br>to the nearest £ | Restricted funds<br>to the nearest £ | Endowment funds<br>to the nearest £ | Total funds<br>to the nearest £ | Last year<br>to the nearest £ |
|---|--|--------------------------------------|-------------------------------------|---------------------------------|-------------------------------|
| <b>A1 Receipts</b>                                    |  |                                      |                                     |                                 |                               |
| Donations and membership                              | 22,350                                 | -                                    | -                                   | 22,350                          | 21,695                        |
| Gift Aid  | -                                      | -                                    | -                                   | -                               | 9,198                         |
| Fundraising   | -                                      | 3,264                                | -                                   | 3,264                           | 1,995                         |
| Greek School fees                                     | 29,013                                 | -                                    | -                                   | 29,013                          | 23,871                        |
| Furlough receipts                                     | 2,510                                  | -                                    | -                                   | 2,510                           | 1,883                         |
| Other charitable activities                           | -                                      | -                                    | -                                   | -                               | 85                            |
| Bank interest   | 3                                      | -                                    | -                                   | 3                               | 15                            |
|   | -                                      | -                                    | -                                   | -                               | -                             |
|   | -                                      | -                                    | -                                   | -                               | -                             |
|   | -                                      | -                                    | -                                   | -                               | -                             |
| <b>Sub total (Gross income for AR)</b>                | <b>53,876</b>                          | <b>3,264</b>                         | <b>-</b>                            | <b>57,140</b>                   | <b>58,742</b>                 |
| <b>A2 Asset and investment sales, (see table).</b>    |  |                                      |                                     |                                 |                               |
|   | -                                      | -                                    | -                                   | -                               | -                             |
|   | -                                      | -                                    | -                                   | -                               | -                             |
| <b>Sub total</b>                                      | <b>-</b>                               | <b>-</b>                             | <b>-</b>                            | <b>-</b>                        | <b>-</b>                      |
| <b>Total receipts</b>                                 | <b>53,876</b>                          | <b>3,264</b>                         | <b>-</b>                            | <b>57,140</b>                   | <b>58,742</b>                 |
| <b>A3 Payments</b>                                    |  |                                      |                                     |                                 |                               |
| Clergy employment costs                               | 23,349                                 | -                                    | -                                   | 23,349                          | 29,531                        |
| Clergy accommodation costs                            | 3,361                                  | -                                    | -                                   | 3,361                           | 3,055                         |
| Greek School teacher salary costs                     | 21,811                                 | -                                    | -                                   | 21,811                          | 22,141                        |
| Other Greek School costs                              | 9,284                                  | -                                    | -                                   | 9,284                           | 993                           |
| Donations   | 25                                     | 3,033                                | -                                   | 3,058                           | 769                           |
| Other charitable costs                                | 150                                    | -                                    | -                                   | 150                             | 873                           |
|   | -                                      | -                                    | -                                   | -                               | -                             |
|   | -                                      | -                                    | -                                   | -                               | -                             |
|   | -                                      | -                                    | -                                   | -                               | -                             |
| <b>Sub total</b>                                      | <b>57,980</b>                          | <b>3,033</b>                         | <b>-</b>                            | <b>61,013</b>                   | <b>57,362</b>                 |
| <b>A4 Asset and investment purchases, (see table)</b> |  |                                      |                                     |                                 |                               |
|   | -                                      | -                                    | -                                   | -                               | -                             |
|   | -                                      | -                                    | -                                   | -                               | -                             |
| <b>Sub total</b>                                      | <b>-</b>                               | <b>-</b>                             | <b>-</b>                            | <b>-</b>                        | <b>-</b>                      |
| <b>Total payments</b>                                 | <b>57,980</b>                          | <b>3,033</b>                         | <b>-</b>                            | <b>61,013</b>                   | <b>57,362</b>                 |
| <b>Net of receipts/(payments)</b>                     | <b>- 4,104</b>                         | <b>231</b>                           | <b>-</b>                            | <b>- 3,873</b>                  | <b>1,380</b>                  |
| <b>A5 Transfers between funds</b>                     | <b>- 100</b>                           | <b>100</b>                           | <b>-</b>                            | <b>-</b>                        | <b>-</b>                      |
| <b>A6 Cash funds last year end</b>                    | <b>59,746</b>                          | <b>681</b>                           | <b>-</b>                            | <b>60,427</b>                   | <b>59,047</b>                 |
| <b>Cash funds this year end</b>                       | <b>55,542</b>                          | <b>1,012</b>                         | <b>-</b>                            | <b>56,554</b>                   | <b>60,427</b>                 |

## Section B Statement of assets and liabilities at the end of the period

| Categories           | Details  | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>to nearest £ |
|----------------------|--|------------------------------------|----------------------------------|---------------------------------|
| <b>B1 Cash funds</b> | Barclays Tracker Account                               | 35,003                             | -                                | -                               |
|                      | Greek School Bank Account                              | 17,850                             | -                                | -                               |
|                      | Paypal Account   | 175                                | -                                | -                               |
|                      | Barclays Current Account                               | 2,450                              | 1,012                            | -                               |
|                      | Cash   | 64                                 | -                                | -                               |
|                      |  |                                    |                                  |                                 |
|                      | <b>Total cash funds</b>                                | <b>55,542</b>                      | <b>1,012</b>                     | <b>-</b>                        |
|                      | (agree balances with receipts and payments account(s)) | OK                                 | OK                               | OK                              |

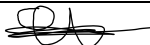
|                                 | Details            | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>to nearest £ |
|---------------------------------|--------------------|------------------------------------|----------------------------------|---------------------------------|
| <b>B2 Other monetary assets</b> | Gift aid claimable | 2,365                              | -                                | -                               |
|                                 |                    | -                                  | -                                | -                               |
|                                 |                    | -                                  | -                                | -                               |
|                                 |                    | -                                  | -                                | -                               |
|                                 |                    | -                                  | -                                | -                               |
|                                 |                    | -                                  | -                                | -                               |

|                             | Details | Fund to which asset<br>belongs | Cost (optional) | Current value<br>(optional) |
|-----------------------------|---------|--------------------------------|-----------------|-----------------------------|
| <b>B3 Investment assets</b> |         |                                | -               | -                           |
|                             |         |                                | -               | -                           |
|                             |         |                                | -               | -                           |
|                             |         |                                | -               | -                           |
|                             |         |                                | -               | -                           |

|   | Details  | Fund to which asset<br>belongs | Cost (optional) | Current value<br>(optional) |
|---|--|--------------------------------|-----------------|-----------------------------|
| <b>B4 Assets retained for the charity's own use</b> | Parish owned house for priest; land and buildings at 24 Cavendish Drive Marston Oxford OX3 0SD Buildings being depreciated at 4% pa (£6,886) | Unrestricted                   | -               | -                           |
|   |  |                                | -               | -                           |
|   |  |                                | -               | -                           |
|   |  |                                | -               | -                           |
|   |  |                                | -               | -                           |

|                       | Details                  | Fund to which liability<br>relates | Amount due<br>(optional) | When due<br>(optional) |
|-----------------------|--------------------------|------------------------------------|--------------------------|------------------------|
| <b>B5 Liabilities</b> | Independent Examiner fee | Unrestricted                       | -                        |                        |
|                       | Clergy travel costs      | Unrestricted                       | -                        |                        |
|                       | Archdiocese contribution | Unrestricted                       | -                        |                        |
|                       |                          |                                    | -                        |                        |
|                       |                          |                                    | -                        |                        |

Signed by one or two trustees on behalf of all the trustees

| Signature   | Print Name           | Date of approval |
|---|----------------------|------------------|
|  | Dr Philip Atzemoglou | 02/05/2023       |
|   |                      |                  |