

THE OSCAR ROMERO AWARD TRUST

England & Wales · Charity number 1174108

Details

Status Registered

Legal form CIO

Registered 2017-08-03

Register [View on the Charity Commission register](#)

Contact

Address Oaklands Catholic School
Stakes Hill Road
Waterlooville
PO7 7BW

Phone 02392259214

Email contact@romeroaward.co.uk

Website www.romeroaward.co.uk

Activities

Objects: TO ADVANCE THE CATHOLIC FAITH FOR THE BENEFIT OF THE PUBLIC IN ACCORDANCE WITH THE TEACHINGS OF BLESSED 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.

Activities: To establish and manage an Award to promote social justice in Catholic schools/colleges across the country, inspired by the example of St. Oscar Romero. Provide schools/colleges with an inclusive structure (framework) for exploring ways and developing strategies to put Catholic social justice into practice; An Award that recognises and celebrate a commitment to promoting social justice.

Classification

- **How:** Provides Advocacy/advice/information
- **What:** Education/training, Religious Activities
- **Who:** Children/young People, The General Public/mankind

Geography

- Ireland
- Northern Ireland
- Scotland
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-08-31	£20,142	£58,502	-	-
2024-08-31	£104,460	£27,362	-	-
2023-08-31	£10,885	£15,155	-	-
2022-08-31	£47,886	£28,644	-	-
2021-08-31	£35,895	£18,290	-	-

Trustees

Name	Role	Appointed
David Anthony Hartnett	Chair	2023-09-01
Dervla McConn-Finch		2024-11-01
Dr Ashley Cranston Beck		2019-11-21
Julie Ann Oldroyd		2021-11-26
MATTHEW QUINN		2017-03-08
Sister Jane Livesey		2024-02-01
Susannah Watchorn		2023-09-01
Walter Andrew Hollas		2024-02-01

THE OSCAR ROMERO AWARD TRUST

England & Wales - Charity number 1174108

Accounts

THE OSCAR ROMERO AWARD TRUST

(Registered Charity Number 1174108)

FINANCIAL STATEMENTS

YEAR ENDED 31 AUGUST 2025

THE OSCAR ROMERO AWARD TRUST

(Registered Charity Number 1174108)

CHARITY DETAILS

YEAR ENDED 31 AUGUST 2025

Trustees	Dave Hartnett (Chair) Matthew Quinn Dr. Ashley Beck Julie Oldroyd Susannah Watchorn Dr. Marie Cooke (resigned on 13.12.2024) Sr. Jane Livesey Andrew Hollas Dervla McConn-Finch (appointed 1.11.2024)
Co-ordinator	Mugeni Sumba
Patron	The Most Rev. John Wilson, Archbishop of Southwark
Postal Address	Oakland Catholic School Stakes Hill Road Waterlooville PO7 7BW
Email Address	contact@romeroaward.co.uk
Website	www.romeroaward.co.uk

THE OSCAR ROMERO AWARD TRUST
ANNUAL REPORT
YEAR ENDED 31 AUGUST 2025

Introduction

The trustees present their annual report and financial statements for the year ended 31 August 2025.

Objectives and Activities

The objectives of the charity are to advance the Catholic faith for the benefit of the public in accordance with the teachings of Archbishop St. 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.

The award scheme provides a framework to support schools to recognize and celebrate what they do to promote Catholic Social Teaching (CST) and challenges them to weave CST into the culture and ethos of the school by way of strategic planning, curriculum development, and practical choices.

The Oscar Romero Award is available at three levels as follows

Participator Level

The school promotes Catholic Social Teaching through charitable work or support of charities as well as having regard for human dignity and justice in its policies and practices. At this level, the school will self-assess to see what they already do and how are they living their mission as a Catholic community. Do they already take part in any social justice awareness or promotion activities?

Developer Level

The school develops resources and starts embedding Catholic Social Teaching principles in its every-day life. At this level the school community will be challenged to develop what they are already doing. The school develops an image that shows and identifies with the Church's call to the 'preferential option for the poor'. What impact do these activities have on the school community?

Innovator Level

The school works with other schools to promote Catholic Social Teaching and social justice is embedded in every aspect of the school's life. At this level, the school community is challenged to become fully alive, working to promote social justice awareness in and beyond the school. The school actively engages in changing the culture of its practice and life so that all its members see it as their duty to challenge inequality wherever they see it.

In administering the charity, the trustees have complied with duty under section 17(5), Charities Act 2011, to have regard to the public benefit guidance issued by the Charity Commission.

THE OSCAR ROMERO AWARD TRUST
ANNUAL REPORT
YEAR ENDED 31 AUGUST 2025 (continued)

Achievements and Performance

This year has seen the continued national recovery from the effects of Covid by all educational establishments. The Trust has moved in the operational phase, focusing on supporting schools which have registered for the Award and promoting the Award in schools and dioceses throughout the country. At the date of this report, a total of 342 schools had registered for the Award. Of these, (153 schools had achieved Participator Level, 30 schools had achieved Developer Level and 2 schools had achieved Innovator Level.

Archbishop John Wilson, Patron of the Trust, continues to encourage schools in his Archdiocese of Southwark to join the Award Programme. During the annual celebration of Mass at St. George's Cathedral (Southwark) to mark the feast day of St. Oscar Romero in March 2025, Archbishop Wilson presented certificates to schools that had achieved Participator and Developer Level of the Award in Southwark Archdiocese. In total, 64 schools have achieved Participator Level and 11 schools achieved Developer Level of the Award. We are also delighted that in July, Bishop Richard Moth of Arundel and Brighton Catholic Diocese presided over the inaugural presentation of certificates to schools in his diocese that had achieved the Award. 10 schools were presented with the Participator Level certificates and one was presented with the Developer Level certificate. Volunteer Validators are key to the delivery of individual school assessments. They assess the evidence schools submit in their applications, offer guidance on activities that schools can do to meet the threshold of each level, and can also visit schools to support them. The Coordinator provides training and support for our volunteer Validators and is actively recruiting additional volunteers to look after the growing number of schools registering for the Award. We continue to use the Catholic Safeguarding Standards Agency to complete all DBS checks for all our volunteers.

Principal risks and mitigations

The trustees have identified the following as the principal risks to the achievement of the charity's objectives:

Child protection and safeguarding

The charity has safeguarding policies and DBS procedures in place and is registered with The Catholic Safeguarding Standards Agency. Safeguarding policies and procedures are evaluated every year. We have two Designated Safeguarding Leads.

Funding requirements

We aim to develop additional relationships with major donors, trusts and foundations in order to fund the next stages of our planned activities.

Volunteers to act as Validators.

At the date of this report the charity operates with one Coordinator and 12 volunteers qualified to act as Validators. As the number of registered schools increases, we need additional volunteers to work with us in these important roles.

THE OSCAR ROMERO AWARD TRUST

ANNUAL REPORT

YEAR ENDED 31ST AUGUST 2025 (continued)

Financial review and reserves policy

The total income of £20,142 was raised during the year (2024 £104,460). Full details are set out in notes to the accounts. The result of the year was a deficit of £38,360 (2024 a surplus of £77,098).

The charity needs to hold reserves in order to ensure a measure of resilience against unexpected costs or income shortfalls. Given the current rapid expansion of activities and making realistic estimates of time taken to secure grant funding, the trustees have determined that unrestricted funds of not less than six months' staff costs should be held in reserve, based on the budget for the forthcoming year. At 31 August 2025 this target amounted to £15,000, and actual unrestricted reserves amounted to £ £79,041.

Future plans

In 2023 a five-year plan was prepared. The Oscar Romero Award Trust will

- Promote a framework that will enable schools to reflect and promote Catholic social justice.
- Develop meaningful partnerships with like-minded organizations to ensure its growth and development in promoting evangelization in schools.

To fulfill this mission, we will pursue the following goals

- Build stronger relationships between Catholic schools, the Church, schools of other Christian denominations and organizations that promote Catholic Social Teaching
- Strengthen programs within Catholic schools that promote Catholic Social Teaching
- Deepen the identity of schools in their commitment to their faith
- Develop organizational agility and competence within the Trust
- Ensure sustainability through stewardship of resources.

Structure, governance and management

The Oscar Romero Award Trust is

- Constituted as a Charitable Incorporated Organization (CIO), governed by its CIO constitution dated 3 August 2017 as amended 6 May 2022 and
- Registered as a charity in England and Wales, number 1174108.

The members of the CIO are the trustees for the time being.

The constitution requires a minimum of three trustees and a maximum of nine trustees. It further requires that there must always be a majority of trustees who are baptized and practicing Catholics.

THE OSCAR ROMERO AWARD TRUST
ANNUAL REPORT
YEAR ENDED 31 AUGUST 2025 (continued)

Trustees are initially appointed for a term of four years and retiring trustees are eligible for reappointment. New trustees are selected for appointment having regard to the skills, knowledge and experience needed for the charity to achieve its objectives. Trustee training is provided when required.

The Coordinator, Mugeni Sumba, is appointed by the trustees to manage the day-to-day operations of the charity with delegated authority. Mr. Sumba is employed by a school, and the charity compensates the school for Mr. Sumba's time spent on the charity's affairs as appropriate.

By order of the board

Signed

Dave Hartnett
Chair

12 December 2025

**THE OSCAR ROMERO AWARD TRUST
INDEPENDENT EXAMINER'S REPORT
YEAR ENDED 31 AUGUST 2025**

No report is submitted as the charity's income for the year was below £25,000.

The Financial Statements were prepared by Walter Andrew Hollas FCA, our trustee with financial responsibility.

Signed

Walter Andrew Hollas

12 December 2025

**THE OSCAR ROMERO AWARD TRUST
RECEIPTS AND PAYMENTS ACCOUNT
YEAR ENDED 31 AUGUST 2025**

	2025 Total * £	2024 Total * £
Income from		
Grants and donations	7,500	93,000
Charitable Activities	12,642	11,460
Other income	<u>0</u>	<u>0</u>
	20,142	104,460
Expenditure on		
Charitable activities	58,502	27,362
Other expenditure	0	0
	<u>58,502</u>	<u>27,362</u>
Net surplus/(deficit) for the year	(38,360)	77,098
Funds at start of year	117,402	40,304
Funds at the end of year	<u>79,041</u>	<u>117,402</u>

- All funds are unrestricted.

THE OSCAR ROMERO AWARD TRUST
STATEMENT OF ASSETS AND LIABILITIES
31 AUGUST 2025

	2025	2024
	£	£
Current assets		
Cash at bank and in hand	79,041	117,402
	79,041	117,402
Current liabilities		
Payables - amounts falling due within one year	Nil	Nil
Net current assets	79,041	117,402
Net assets	79,041	117,402
Funds of the charity		
Restricted funds	Nil	Nil
Unrestricted funds	79,041	117,402
Total funds	79,041	117,402

Approved by the trustees and signed on their behalf by

Dave Hartnett
Chair

Walter Andrew Hollas
Trustee

12 December 2025

THE OSCAR ROMERO AWARD TRUST
NOTES TO THE RECEIPTS AND PAYMENTS ACCOUNTS
YEAR ENDED 31 AUGUST 2025

1. Accounting Policies

(a) Basis of preparing the financial statements

The accounts are prepared on a receipts and payments basis as permitted by Section 133 of the Charities Act 2011.

(b) Going Concern

Having reviewed the financial position and future plans for the charity, the trustees have identified no material uncertainties related to events or conditions that cast significant doubt on the charity's ability to continue its activities for the foreseeable future. Accordingly, they continue to adopt a going concern basis in preparing the financial statements

(c) Fund Accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

2. Trustees and employees

No trustees received any remuneration or other benefits, 2024/2025.

In 2023/2024 Trustees received re-imbusement of travel expenses as follows

- Julie Oldroyd £26.30
- Matthew Quinn £72.00

The CIO employed no staff in 2024/2025 (2023/2024 none).

THE OSCAR ROMERO AWARD TRUST

England & Wales - Charity number 1174108

Accounts

THE OSCAR ROMERO AWARD TRUST

(Registered Charity Number 1174108)

FINANCIAL STATEMENTS

YEAR ENDED 31 AUGUST 2024

THE OSCAR ROMERO AWARD TRUST

(Registered Charity Number 1174108)

CHARITY DETAILS

YEAR ENDED 31 AUGUST 2024

Trustees Dave Hartnett (Chair) (Appointed 1 September 2023)
 Matthew Quinn
 Dr. Ashley Beck
 Dennise Mitchell (resigned 13 February 2024)
 Julie Oldroyd
 Susannah Watchorn (appointed 1 September 2023)
 Dr. Marie Cooke (appointed 1 September 2023)
 Sr. Jane Livesey (appointed 1 February 2024)
 Andrew Hollas (appointed 1 February 2024)

Co-ordinator Mugeni Sumba

Patron The Most Rev. John Wilson, Archbishop of Southwark

Postal Address Oakland Catholic School
 Stakes Hill Road
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 PO7 7BW

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THE OSCAR ROMERO AWARD TRUST
ANNUAL REPORT
YEAR ENDED 31 AUGUST 2024

Introduction

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Objectives and Activities

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The award scheme provides a framework to support schools to recognize and celebrate what they do to promote Catholic Social Teaching (CST) and challenges them to weave CST into the culture and ethos of the school by way of strategic planning, curriculum development, and practical choices.

The Oscar Romero Award is available at three levels as follows

Participator Level

The school promotes Catholic Social Teaching through charitable work or support of charities as well as having regard for human dignity and justice in its policies and practices. At this level, the school will self-assess to see what they already do and how are they living their mission as a Catholic community. Do they already take part in any social justice awareness or promotion activities?

Developer Level

The school develops resources and starts embedding Catholic Social Teaching principles in its every-day life. At this level the school community will be challenged to develop what they are already doing. The school develops an image that shows and identifies with the Church's call to the 'preferential option for the poor'. What impact do these activities have on the school community?

Innovator Level

The school works with other schools to promote Catholic Social Teaching and social justice is embedded in every aspect of the school's life. At this level, the school community is challenged to become fully alive, working to promote social justice awareness in and beyond the school. The school actively engages in changing the culture of its practice and life so that all its members see it as their duty to challenge inequality wherever they see it.

In administering the charity, the trustees have complied with duty under section 17(5), Charities Act 2011, to have regard to the public benefit guidance issued by the Charity Commission.

THE OSCAR ROMERO AWARD TRUST
ANNUAL REPORT
YEAR ENDED 31 AUGUST 2024 (continued)

Achievements and Performance

The Trust has moved in the operational phase, focusing on supporting schools which have registered for the Award and promoting the Award in schools and dioceses throughout the country. At 31 August 2024, 295 schools had registered for the Award 118 schools had achieved Participator Level 25 schools had achieved Developer Level.

Archbishop John Wilson, Patron of the Trust, continues to encourage schools in his Archdiocese of Southwark to join the Award Programme. During the annual celebration of Mass at St. George's Cathedral (Southwark) to mark the feast day of St. Oscar Romero in March 2024, Archbishop Wilson presented certificates to 15 schools that had achieved Participator Level of the Award and 10 schools that had achieved Developer Level of the Award.

Volunteer Validators are key to the delivery of individual school assessments. They assess the evidence schools submit in their applications, offer guidance on activities that schools can do to meet the threshold of each level, and can also visit schools to support them. The Coordinator provides training and support for our volunteer Validators, and is actively recruiting additional volunteers to look after the growing number of schools registering for the Award. We continue to use the Catholic Safeguarding Standards Agency to complete all DBS checks for all our volunteers.

Principal risks and mitigations

The trustees have identified the following as the principal risks to the achievement of the charity's objectives:

Child protection and safeguarding

The charity has safeguarding policies and DBS procedures in place and is registered with The Catholic Safeguarding Standards Agency. Safeguarding policies and procedures are evaluated every year. We have two Designated Safeguarding Leads.

Funding requirements

We aim to develop additional relationships with major donors, trusts and foundations in order to fund the next stages of our planned activities.

Volunteers to act as Validators.

At the date of this report the charity operates with one Coordinator and 10 volunteers qualified to act as Validators. As the number of registered schools increases, we need additional volunteers to work with us in these important roles.

THE OSCAR ROMERO AWARD TRUST

ANNUAL REPORT

YEAR ENDED 31ST AUGUST 2024 (continued)

Financial review and reserves policy

The total income of £104,460 was raised during the year (2023: £10,885). Full details are set out in notes to the accounts. The result of the year was a surplus of £77,098 (2023; a deficit of £4,270).

The charity needs to hold reserves in order to ensure a measure of resilience against unexpected costs or income shortfalls. Given the current rapid expansion of activities and making realistic estimates of time taken to secure grant funding, the trustees have determined that unrestricted funds of not less than six months' staff costs should be held in reserve, based on the budget for the forthcoming year. At 31 August 2024 this target amounted to £15,000, and actual unrestricted reserves amounted to £ £117,402.

Future plans

In 2023 a five-year plan was prepared. The Oscar Romero Award Trust will

- Promote a framework that will enable schools to reflect and promote Catholic social justice.
- Develop meaningful partnerships with like-minded organizations to ensure its growth and development in promoting evangelization in schools.

To fulfill this mission, we will pursue the following goals

- Build stronger relationships between Catholic schools, the Church, schools of other Christian denominations and organizations that promote Catholic Social Teaching
- Strengthen programs within Catholic schools that promote Catholic Social Teaching
- Deepen the identity of schools in their commitment to their faith
- Develop organizational agility and competence within the Trust
- Ensure sustainability through stewardship of resources.

Structure, governance and management

The Oscar Romero Award Trust is

- Constituted as a Charitable Incorporated Organization (CIO), governed by its CIO constitution dated 3 August 2017 as amended 6 May 2022 and
- Registered as a charity in England and Wales, number 1174108.

The members of the CIO are the trustees for the time being.

The constitution requires a minimum of three trustees and a maximum of seven trustees. It further requires that there must always be a majority of trustees who are baptized and practicing Catholics.

THE OSCAR ROMERO AWARD TRUST
ANNUAL REPORT
YEAR ENDED 31 AUGUST 2024 (continued)

Trustees are initially appointed for a term of four years and retiring trustees are eligible for reappointment. New trustees are selected for appointment having regard to the skills, knowledge and experience needed for the charity to achieve its objectives. Trustee training is provided when required.

The Coordinator, Mugeni Sumba, is appointed by the trustees to manage the day-to-day operations of the charity with delegated authority. Mr. Sumba is employed by a school, and the charity compensates the school for Mr. Sumba's time spent on the charity's affairs as appropriate.

By order of the board

Dave Hartnett

Chair

12 June 2025

**THE OSCAR ROMERO AWARD TRUST
INDEPENDENT EXAMINER'S REPORT
YEAR ENDED 31 AUGUST 2024**

I report to the trustees of the Oscar Romero Award Trust on my examination of the accounts of the above Charitable Incorporated Organisation (CIO) for the year ended 31 August 2024.

Responsibilities and Basis of Report

As the trustees of the CIO 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 CIO's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent Examiners Statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that any material respect:

- 1) Accounting records were not kept as required by section 130 of the Charities Act; or
- 2) The accounts did not accord with the accounting records.

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

Richard Solomon, FCA

30 Paines Lane, Pinner, Middlesex

12 June 2025

**THE OSCAR ROMERO AWARD TRUST
RECEIPTS AND PAYMENTS ACCOUNT
YEAR ENDED 31 AUGUST 2024**

	2024 Total * £	2023 Total * £
Income from		
Grants and donations	93,000	
Charitable Activities	11,460	10,550
Other income	<u>0</u>	<u>335</u>
	104,460	10,885
Expenditure on		
Charitable activities	27,362	15,155
Other expenditure	0	
	<u>27,362</u>	<u>15,155</u>
Net surplus/(deficit) for the year	77,098	(4,270)
Funds at start of year	40,304	44,574
Funds at the end of year	<u>117,402</u>	<u>40,304</u>

- All funds are unrestricted.

THE OSCAR ROMERO AWARD TRUST
STATEMENT OF ASSETS AND LIABILITIES
31 AUGUST 2024

	2024	2023
	£	£
Current assets		
Cash at bank and in hand	117,402	40,304
	117,402	40,304
Current liabilities		
Payables - amounts falling due within one year	Nil	Nil
Net current assets	117,402	40,304
Net assets	117,402	40,304
Funds of the charity		
Restricted funds	Nil	Nil
Unrestricted funds	117,402	40,304
Total funds	117,402	40,304

Approved by the trustees and signed on their behalf by

Dave Hartnett
Chair

12 June 2025

THE OSCAR ROMERO AWARD TRUST
NOTES TO THE RECEIPTS AND PAYMENTS ACCOUNTS
YEAR ENDED 31 AUGUST 2024

1. Accounting Policies

(a) Basis of preparing the financial statements

The accounts are prepared on a receipts and payments basis as permitted by Section 133 of the Charities Act 2011.

(b) Going Concern

Having reviewed the financial position and future plans for the charity, the trustees have identified no material uncertainties related to events or conditions that cast significant doubt on the charity's ability to continue its activities for the foreseeable future. Accordingly, they continue to adopt a going concern basis in preparing the financial statements

(c) Fund Accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

2. Trustees and employees

No trustees received any remuneration or other benefits, 2023/2024 (2022/2023 none). Trustees received re-imbusement of travel expenses as follows

- Julie Oldroyd £26.30
- Matthew Quinn £72.00

The CIO employed no staff in 2023/2024 (2022/2023: none).

THE OSCAR ROMERO AWARD TRUST

England & Wales - Charity number 1174108

Accounts

THE OSCAR ROMERO AWARD TRUST

(Registered Charity Number 1174108)

FINANCIAL STATEMENTS

YEAR ENDED 31ST AUGUST 2023

THE OSCAR ROMERO AWARD TRUST

(Registered Charity Number 1174108)

CHARITY DETAILS

YEAR ENDED 31ST AUGUST 2023

Trustees: Matthew Quinn (Chair)
Paul Quinn (retired 11th November 2022)
Dr. Ashley Beck
Denise Mitchell
Julie Oldroyd

Co-ordinator: Mugeni Sumba

Patron: The Most Rev. John Wilson, Archbishop of Southwark

Postal Address: Oakland Catholic School
Stakes Hill Road
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THE OSCAR ROMERO AWARD TRUST

ANNUAL REPORT

YEAR ENDED 31ST AUGUST 2023

Introduction

The trustees present their annual report and financial statements for the year ended 31st August 2023.

Objectives and Activities

The objectives of the charity are to advance the Catholic faith for the benefit of the public in accordance with the teachings of Archbishop St. 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.

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Participator Level

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Developer Level

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Innovator Level

The school works with other schools to promote Catholic Social Teaching and social justice is embedded in every aspect of the school's life. At this level, the school community is challenged to become fully alive, working to promote social justice awareness in beyond the school. The school actively engages in changing the culture of its practice and life so that all its members see it as their duty to challenge inequality wherever they see it.

In administering the charity, the trustees have complied with duty under section 17(5), Charities Act 2011, to have regard to the public benefit guidance issued by the Charity Commission.

THE OSCAR ROMERO AWARD TRUST

ANNUAL REPORT

YEAR ENDED 31ST AUGUST 2023 (continued)

Achievements and Performance

This year has seen the continued national recovery from the effects of Covid by all educational establishments. The Trust has moved in the operational phase, focusing on supporting schools which have registered for the Award and promoting the Award in schools and dioceses throughout the country. At the date of this report;

- 144 schools had registered for the Award
- 90 schools had achieved Participator Level
- 20 schools had achieved Developer Level.

Archbishop John Wilson, Patron of the Trust, has encouraged schools in his Archdiocese of Southwark to join the Award programme. During the annual celebration of Mass at St. George's Cathedral (Southwark) to mark the feast day of St. Oscar Romero on 20 March 2023, Archbishop Wilson presented certificates to 20 schools that had achieved Participator Level of the Award in that year.

Volunteer Validators are key to the delivery of individual school assessments. They assess the evidence schools submit in their applications, offer guidance on activities that schools can do to meet the threshold of each level, and can also visit schools to support them. The Co-ordinator provides training and support for our volunteer Validators and is actively recruiting additional volunteers to look after the growing number of schools registering for the Award. We continue to use the Catholic Safeguarding Standards Agency to complete all DBS checks for all our volunteers.

Principal risks and mitigations

The trustees have identified the following as the principal risks to the achievement of the charity's objectives:

Child protection and safeguarding

The charity has safeguarding policies and DBS procedures in place and is registered with the Catholic Safeguarding Standards Agency. Safeguarding is a standing item at all meetings of the trust board and safeguarding policies and procedures are evaluated every year. We have two Designated Safeguarding Leads and a trustee responsible for safeguarding.

Funding requirements

We aim to develop additional relationships with major donors, trusts and foundations in order to fund the next stages of our planned activities.

Volunteers to act as Validators.

At the date of this report the charity operates with one Co-ordinator and 8 volunteers qualified to act as Validators. As the number of registered schools increases, we need additional volunteers to work with us in these important roles.

THE OSCAR ROMERO AWARD TRUST

ANNUAL REPORT

YEAR ENDED 31ST AUGUST 2023 (continued)

Financial review and reserves policy

The total income of £10,885 was raised during the year (2022: £47,886). Full details are set out in notes to the accounts. The result of the year was a deficit of £4,270 (2022; surplus of £19,242).

The charity needs to hold reserves in order to ensure a measure of resilience against unexpected costs or income shortfalls. Given the current rapid expansion of activities and making realistic estimates of time taken to secure grant funding, the trustees have determined that unrestricted funds of not less than six months' operating costs should be held in reserve, based on the budget for the forthcoming year. At 31 August 2023 this target amounted to £12,500, and actual unrestricted reserves amounted to £40,304.

Future plans

In 2023 a five year plan was prepared. The Oscar Romero Award Trust will

- Promote a framework that will enable schools reflect and promote Catholic social justice
- Develop meaningful partnerships with like-minded organizations to ensure its growth and development in promoting evangelization in schools.

To fulfill this mission, we will pursue the following goals

- Build stronger relationships between Catholic schools, the Church, schools of other Christian denominations and organizations that promote Catholic Social Teaching
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The members of the CIO are the trustees for the time being.

The constitution requires a minimum of three trustees and a maximum of seven trustees. It further requires that there must always be a majority of trustees who are baptized and practicing Catholics.

THE OSCAR ROMERO AWARD TRUST

ANNUAL REPORT

YEAR ENDED 31ST AUGUST 2023 (continued)

Trustees are initially appointed for a term of four years and retiring trustees are eligible for reappointment. New trustees are selected for appointment having regard to the skills, knowledge and experience needed for the charity to achieve its objectives. Trustee training is provided when required.

The Co-ordinator, Mugeni Sumba, is appointed by the trustees to manage the day-to-day operations of the charity with delegated authority. Mr. Sumba is employed by a school, and the charity compensates the school for Mr. Sumba's time spent on the charity's affairs as appropriate.

Statement of trustees' responsibilities

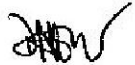
The trustees are responsible for preparing their annual report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Charity Law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable incorporated organization (CIO) and of the incoming resources and application of resources, including the income and expenditure, of the CIO for that period. In preparing those financial statements. The trustees are required to:

- Select suitable accounting policies and then apply them consistently.
- Observe the methods and principles in Accounting and Reporting by Charities Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) ('the Charities SORP').
- Make judgments and estimates that are reasonable and prudent.
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the CIO will continue in operation.

The trustees are responsible for keeping adequate accounting records disclose with reasonable accuracy at any time the financial position of the CIO and enable them to ensure that the financial statements comply with the Charities Act 2011 and the Charities SORP. They are also responsible for safeguarding the assets of the CIO and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

By order of the board



Dave Hartnett CB

Chair

10th May 2024

**THE OSCAR ROMERO AWARD TRUST
INDEPENDENT EXAMINER'S REPORT
YEAR ENDED 31ST AUGUST 2023**

NOT NECESSARY IN 2023 Revenue less than £25,000

I will delete this page

THE OSCAR ROMERO AWARD TRUST
STATEMENT OF FINANCIAL ACTIVITIES
YEAR ENDED 31ST AUGUST 2023

	Note	Restricted £	Unrestricted £	2023 Total £	Restricted £	Unrestricted £	2022 Total £
Income from:							
Grants and donations	2				5,800	29,586	35,386
Charitable Activities	3		10,550	10,550		12,500	12,500
Other income			<u>335</u>	<u>335</u>			
			10,885	10,885	5,800	42,086	47,886
Expenditure on:							
Charitable activities	4		15,155	15,155	5,800	22,844	28,644
Other expenditure							
			<u>15,155</u>	<u>15,155</u>	<u>5,800</u>	<u>22,844</u>	<u>28,644</u>
Net surplus/(deficit) for the year			(4,270)	(4,270)		19,242	19,242
Funds at start of year			44,574	44,574		25,332	25,332
Funds at the end of year			<u>40,304</u>	<u>40,304</u>		<u>44,574</u>	<u>44,574</u>

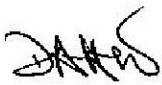
THE OSCAR ROMERO AWARD TRUST

BALANCE SHEET

31ST AUGUST 2023

	Note	2023 £	2022 £
Current assets			
Receivables	5	nil	1,675
Cash at bank and in hand		40,304	52,288
		40,304	53,963
Current liabilities			
Payables - amounts falling due within one year	6	Nil	9,389
Net current assets		40,304	44,574
Net assets		40,304	44,574
Funds of the charity			
Restricted funds	7	Nil	nil
Unrestricted funds		40,304	44,574
Total funds		40,304	44,574

Approved by the trustees and signed on their behalf by



Dave Hartnett CB

Chair

10th May 2024

THE OSCAR ROMERO AWARD TRUST

NOTES TO THE ACCOUNTS

YEAR ENDED 31ST AUGUST 2023

1. Accounting Policies

Basis of preparing the financial statements

The financial statements have been prepared under the historical cost and in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) ('the Charities SORP').

Having reviewed the financial position and future plans for the charity, the trustees have identified no material uncertainties related to events or conditions that cast significant doubt on the charity's ability to continue its activities for the foreseeable future. Accordingly, they continue to adopt a going concern basis in preparing the financial statements.

The charity is a public benefit entity as defined in FRS 102.

Income

All income is recognized in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Expenditure

Liabilities are recognized as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on accrual basis and has been classified under headings that aggregate all cost relates to the category where costs cannot be directly attributed to particular headings, they have been allocated to activities or a basis consistent with the use of resources.

Fund Accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular, restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular, restricted purposes.

Further examination of the nature and purpose of each fund is included in the notes to the financial statements.

THE OSCAR ROMERO AWARD TRUST
NOTES TO THE ACCOUNTS (continued)
YEAR ENDED 31ST AUGUST 2023

5. Debtors				
		2023		2021
		£		£
Contributions receivable				1,675
				1,675
6. Creditors: amounts falling due within one year				
		2023		2022
		£		£
Creditors				8,909
Accruals				480
				9,389
7. Restricted Funds				
	1st Sept 2022	Income	Expenditure	31st Aug 2023
	£	£	£	£
None				-
				-

8. Trustees and employees

No trustees received any remuneration, other benefits, or reimbursement of expenses in 2022/2023 (2021/2022 none).

The CIO employed no staff in 2022/2023 (2021/2022 none).

THE OSCAR ROMERO AWARD TRUST

England & Wales - Charity number 1174108

Accounts

THE OSCAR ROMERO AWARD TRUST

(Registered Charity number 1174108)

FINANCIAL STATEMENTS

YEAR ENDED 31 AUGUST 2022

THE OSCAR ROMERO AWARD TRUST

(Registered Charity number 1174108)

CHARITY DETAILS

YEAR ENDED 31 AUGUST 2022

Trustees: Matthew Quinn (Chair)
Paul Quinn (retired 11 November 2022)
Dr. Ashley Beck
Denise Mitchell
Julie Oldroyd (appointed 26 November 2021)

Coordinator: Mugeni Sumba

Patron: The Most Rev. John Wilson, Archbishop of Southwark

Postal address: Oaklands Catholic School
Stakes Hill Road
Waterlooville
PO7 7BW

Email address: contact@romeroaward.co.uk

Website: www.romeroaward.co.uk

THE OSCAR ROMERO AWARD TRUST

ANNUAL REPORT

YEAR ENDED 31 AUGUST 2022

Introduction

The trustees present their annual report and financial statements for the year ended 31 August 2022.

Objectives and activities

The objectives of the charity are to advance the Catholic faith for the benefit of the public in accordance with the teachings of Archbishop St. 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.

The award scheme provides a framework to support schools to recognise and celebrate what they do to promote Catholic Social Teaching (CST), and challenges them to weave CST into the culture and ethos of the school by way of strategic planning, curriculum development and practical choices.

The Oscar Romero Award is available at three levels, as follows:

Participator Level

The school promotes Catholic Social Teaching through charitable work or support of charities as well having regard for human dignity and justice in its policies and practices. At this level, the school will self-assess to see what they already do – how are they living their mission as a Catholic community? Do they already take part in any social justice awareness or promotion activities?

Developer Level

The school develops resources and starts embedding Catholic Social Teaching principles in its every-day life. At this level, the school community will be challenged to develop what they already do. The school develops an image that shows and identifies with the Church's call of 'preferential option for the poor'. What impact do these activities have on the school community?

Innovator Level

The school works with others schools to promote Catholic Social Teaching and social justice is embedded in every aspect of the school's life. At this level, the school community is challenged to become fully alive, working to promote social justice awareness in and beyond the school. The school actively changing the culture of its practice and life so that all its members see it as their duty to challenge inequality wherever they see it.

In administering the charity, the trustees have complied with the duty under section 17(5), Charities Act 2011, to have regard to the public benefit guidance issued by the Charity Commission.

THE OSCAR ROMERO AWARD TRUST

ANNUAL REPORT

YEAR ENDED 31 AUGUST 2022 (continued)

Achievements and performance

This year has seen the continued national recovery from the effects of Covid by all educational establishments. The Trust has moved into the operational phase, focusing on supporting schools which have registered for the Award and promoting the Award in schools and dioceses throughout the country. At the date of this report:

- 130 schools had registered for the Award;
- 80 schools had achieved Participator Level;
- 12 schools had achieved Developer Level.

Archbishop John Wilson, Patron of the Trust, has encouraged schools in his Archdiocese of Southwark to join the Award scheme. During the celebration of Mass at St George's Cathedral (Southwark) to mark the feast day of St. Oscar Romero in March 2022, Archbishop Wilson presented certificates to 17 schools that had achieved Participator Level of the Award.

Volunteer Validators are key to the delivery of individual school assessments. They assess the evidence schools submit in their applications, offer guidance on activities that schools can do to meet the threshold of each level, and can also visit schools to support them. The Coordinator provides training and support for our volunteer Validators, and is actively recruiting additional volunteers to look after the growing number of schools registering for the Award. We continue to use the Catholic Safeguarding Standards Agency to complete all DBS checks for all our volunteers.

Principal risks and mitigations

The trustees have identified the following as the principal risks to the achievement of the charity's objectives:

Child protection and safeguarding

The charity has safeguarding policies and DBS procedures in place, and has registered with The Catholic Safeguarding Standards Agency. Safeguarding policies and procedures are evaluated every year. We have two Designated Safeguarding Leads.

Funding requirements

Grants received in the year from the Charles Plater Trust, the Sisters of the Holy Cross, the Congregation of the Passion and CAFOD have enabled the charity's operational phase to continue with vigour. We aim to develop additional relationships with major donors, trusts and foundations in order to fund the next stages of our planned activities.

Volunteers to act as Validators

At the date of this report the charity operates with one Coordinator and ten volunteers qualified to act as Validators. As the number of registered schools increases, we need additional volunteers to work with us in these important roles.

THE OSCAR ROMERO AWARD TRUST

ANNUAL REPORT

YEAR ENDED 31 AUGUST 2022 (continued)

Financial review and reserves policy

Total income of £47,886 was raised during the year (2021: £35,895). Generous and timely funding from trusts, funds and religious orders has enabled us to continue to pay for our Coordinator's time on secondment and to upgrade our website. Full details are set out in the notes to the accounts. The result for the year was a surplus of £19,242 (2021: surplus of £17,604).

The charity needs to hold reserves in order to ensure a measure of resilience against unexpected costs or income shortfalls. Given the current rapid expansion of activities and making realistic estimates of time taken to secure grant funding, the trustees have determined that unrestricted funds of not less than six months' operating costs should be held in reserve, based on the budget for the forthcoming year. At 31 August 2022 this target amounted to £16,000, and actual unrestricted reserves amounted to £44,574.

Future plans

Between 2023 and 2027, the Oscar Romero Award Trust will:

- Promote a framework that will enable schools to reflect and promote Catholic social justice;
- Develop meaningful partnerships with like-minded organisations to ensure its growth and development in promoting evangelisation in schools.

To fulfil this mission, we will pursue the following five goals:

- Build stronger relationships between Catholic schools, the Church; schools of other Christian denominations; and organisations that promote Catholic Social Teaching;
- Strengthen programmes within Catholic schools that promote Catholic Social Teaching;
- Deepen the identity of schools in their commitment to their faith;
- Develop organisational agility and competence within the Trust;
- Ensure sustainability through stewardship of resources.

Structure, governance and management

The Oscar Romero Award Trust is:

- constituted as a Charitable Incorporated Organisation (CIO), governed by its CIO constitution dated 3 August 2017 as amended on 6 May 2022; and
- registered as a charity in England and Wales, number 1174108.

The members of the CIO are the trustees for the time being.

The constitution requires a minimum of three trustees and a maximum of seven. It further requires that there must always be a majority of trustees who are baptised and practicing Catholics.

THE OSCAR ROMERO AWARD TRUST

ANNUAL REPORT

YEAR ENDED 31 AUGUST 2022 (continued)

Trustees are initially appointed for a term of four years, and retiring trustees are eligible for reappointment. New trustees are selected for appointment having regard to the skills, knowledge and experience needed for the charity to achieve its objectives. Trustee training is provided when required.

The Coordinator, Mugeni Sumba, is appointed by the trustees to manage the day-to-day operations of the charity with delegated authority. Mr. Sumba is employed by a school, and the charity compensates the school for Mr. Sumba's time spent on the charity's affairs as appropriate.

Statement of trustees' responsibilities

The trustees are responsible for preparing their annual report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Charity law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable incorporated organisation (CIO) and of the incoming resources and application of resources, including the income and expenditure, of the CIO for that period. In preparing those financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) ('the Charities SORP');
- make judgements and estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the CIO will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the CIO and enable them to ensure that the financial statements comply with the Charities Act 2011 and the Charities SORP. They are also responsible for safeguarding the assets of the CIO and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

By order of the board


Matthew Quinn
Chair

9 June 2023

THE OSCAR ROMERO AWARD TRUST

INDEPENDENT EXAMINER'S REPORT

YEAR ENDED 31 AUGUST 2022

I report to the trustees on my examination of the accounts of the above Charitable Incorporated Organisation (CIO) for the year ended 31 August 2022 set out on pages 6 to 10.

Responsibilities and basis of report

As the trustees of the CIO, 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 CIO's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept as required by section 130 of the Charities Act; or
2. the accounts did not accord with the accounting records; or
3. the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008, other than any requirement that the accounts give a 'true and fair' view, which is not a matter considered as part of an independent examination.

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



Andrew Nicholas Cliffe
Nicholas Cliffe & Co. Limited
Chartered Accountants
Mill House
Mill Court
Great Shelford
Cambridge CB22 5LD

9 June 2023

THE OSCAR ROMERO AWARD TRUST
STATEMENT OF FINANCIAL ACTIVITIES
YEAR ENDED 31 AUGUST 2022

	Note	Rest- ricted £	Unrest- ricted £	2022 Total £	Rest- ricted £	Unrest- ricted £	2021 Total £
Income from:							
Grants and donations	2	5,800	29,586	35,386	-	33,345	33,345
Charitable activities	3	-	12,500	12,500	-	2,550	2,550
Other income		-	-	-	-	-	-
		<u>5,800</u>	<u>42,086</u>	<u>47,886</u>	<u>-</u>	<u>35,895</u>	<u>35,895</u>
Expenditure on:							
Charitable activities	4	5,800	22,844	28,644	-	18,291	18,291
Other expenditure		-	-	-	-	-	-
		<u>5,800</u>	<u>22,844</u>	<u>28,644</u>	<u>-</u>	<u>18,291</u>	<u>18,291</u>
Net surplus/(deficit) for the year		-	19,242	19,242	-	17,604	17,604
Funds at start of year		-	25,332	25,332	-	7,728	7,728
Funds at end of year		<u>-</u>	<u>44,574</u>	<u>44,574</u>	<u>-</u>	<u>25,332</u>	<u>25,332</u>

THE OSCAR ROMERO AWARD TRUST

BALANCE SHEET

31 AUGUST 2022

	Note	2022 £	2021 £
Current assets			
Debtors	5	1,675	975
Cash at bank and in hand		52,288	31,533
		<hr/>	<hr/>
		53,963	32,508
		<hr/>	<hr/>
Current liabilities			
Creditors: amounts falling due within one year	6	9,389	7,176
		<hr/>	<hr/>
Net current assets		44,574	25,332
		<hr/>	<hr/>
Net assets		44,574	25,332
		<hr/> <hr/>	<hr/> <hr/>
Funds of the charity			
Restricted funds	7	-	-
Unrestricted funds		44,574	25,332
		<hr/>	<hr/>
Total funds		44,574	25,332
		<hr/> <hr/>	<hr/> <hr/>

Approved by the trustees and signed on their behalf by



Matthew Quinn
Chair

9 June 2023

THE OSCAR ROMERO AWARD TRUST

NOTES TO THE ACCOUNTS

YEAR ENDED 31 AUGUST 2022

1. Accounting policies

Basis of preparing the financial statements

The financial statements have been prepared under the historical cost convention and in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) ('the Charities SORP').

Having reviewed the financial position and future plans for the charity, the trustees have identified no material uncertainties related to events or conditions that cast significant doubt on the charity's ability to continue its activities for the foreseeable future. Accordingly, they continue to adopt a going concern basis in preparing the financial statements.

The charity is a public benefit entity as defined in FRS102.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings, they have been allocated to activities on a basis consistent with the use of resources.

Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

The 2021 accounts mistakenly reported the charity's income for that financial year as entirely restricted, whereas it was in fact entirely unrestricted. The corresponding amounts in the present accounts have been amended accordingly. There is no effect on the net surplus for each year or on the net assets at the end of each year.

THE OSCAR ROMERO AWARD TRUST
NOTES TO THE ACCOUNTS (continued)
YEAR ENDED 31 AUGUST 2022

5. Debtors

	2022 £	2021 £
Contributions receivable	1,675	975
	<u>1,675</u>	<u>975</u>
	=====	=====

6. Creditors: amounts falling due within one year

	2022 £	2021 £
Creditors	8,909	7,176
Accruals	480	-
	<u>9,389</u>	<u>7,176</u>
	=====	=====

7. Restricted funds

	1 Sept 2021 £	Income £	Expend- iture £	31 Aug 2022 £
Website development costs (Congregation of the Passion)	-	5,800	(5,800)	-
	<u>-</u>	<u>5,800</u>	<u>(5,800)</u>	<u>-</u>
	=====	=====	=====	=====

8. Trustees and employees

No trustees received any remuneration, other benefits, or reimbursement of expenses in 2022 (2021: none).

The CIO employed no staff in 2022 (2021: none).

THE OSCAR ROMERO AWARD TRUST

England & Wales - Charity number 1174108

Accounts

Trustees' Annual Report for the period						
Period start date			Period end date			
From	01	09	2020	To	31	08 2021

Section A Reference and administration details

Charity name

Other names charity is known by

Registered charity number (if any)

Charity's principal address

Oaklands Catholic School and Sixth Form College	
Stakes Hill Road, Waterlooville,	
Hampshire	
Postcode	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	Paul Quinn	Chair		Trustees themselves and Coordinator
2	Matthew Quinn			Trustees themselves and Coordinator
3	Rev Dr Ashley Beck			Trustees themselves and Coordinator
4	Denise Mitchell			Trustees themselves and Coordinator

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

Name	Dates acted if not for whole year
None	

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)

Mugeni Sumba (Oscar Romero Award Trust Coordinator)

Section B Structure, governance and management

Description of the charity's trusts

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

CIO Constitution

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

CIO

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

By skill, knowledge and experience. Appointed by existing Trustees

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.
-
- Trustee training is provided when required
 - The Charity has a simple structure with one Coordinator and three volunteer Validators/Assessors
 - The Charity currently operates within the network of Catholic schools (secondary, primary and sixth form colleges); the Catholic Diocese of Portsmouth and has started attracting schools from the Catholic Dioceses of Clifton, Plymouth, Brentwood, Salford and Cardiff
 - The Charity has continued to develop a relationship with St Mary's University - Twickenham
 - Major risk relates to child protection and safeguarding. The Charity has safeguarding policies and DBS procedures in place and has registered with The Catholic Safeguarding Advisory Service.
 - Major risk of not getting funding to run the Trust
 - Unforeseen major risk with COVID19 and impact on availability of teachers and schools.

Section C

Objectives and activities

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

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 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 main activities have been:

- The Trust has moved into the operational phase and the main focus has continued to be recruitment of schools and informing schools and dioceses of the Award
- Planning for operations in other dioceses, especially Southwark, identifying schools to approach and to prioritise them.
- Recruitment of Validators – as registered schools increase, we need more validators
- Allowing time for the Co-ordinator to train Validators; and set to work with schools on their participation in the Award
- Continued updating of safeguarding and other policies to ensure our safeguarding process is clear
- Continue to work with the Catholic Safeguarding Advisory Service to enable the Charity to complete DBS checks when necessary
- Continue to look for next phase funding from a major RC charity.

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 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.

- The Charity does not make grants
- The Charity does not hold investments
- Volunteers (Validators/Assessors) are key to delivery of individual school assessment – total of 100 hours in a year

Summary of the main achievements of the charity during the year

- FY20/21 has seen the national recovery from the effects of COVID by all educational establishments. It has been interesting to note that the exposure to the societal effects of COVID has sharpened Schools' understanding of the importance of Catholic Social teaching and they have more clearly understood how the Award can help them improve, and explain to assessors, their achievements growth.
- Major grant from The Charles Plater Trust enabled operational phase to continue with vigour.
- The charity has expanded its operations into the Catholic Dioceses of Arundel and Brighton, Plymouth, Clifton, Cardiff, Brentwood, Southwark and Salford. As well as the home Diocese of Portsmouth.
- Archbishop John Wilson, Southwark, as the Trust's Patron has been actively encouraging schools in his Archdiocese to join the Award.
- In the FY20/21, 96 schools were participating in the Award - which is an excellent achievement on limited resources, especially considering the devastating effects of the COVID19 pandemic on the operations of schools.
- Participating schools report a positive impact of the award on the life of pupils and staff, as well as allowing schools to support charitable causes in their local areas as well as on the national level
- We now have 3 qualified validators working for the Award.
- Co-ordinator continues to focus on trust's work by having one day released from teaching. The trustees have determined that if the Award is to grow that the co-ordinator needs administrative assistance to free him from routine admin tasks to take a more strategic and forward-looking role.

Section E

Financial review

Brief statement of the charity's policy on reserves

The only reserves held by the Charity is the residual amount from The Charles Plater Trust grant, which will be used to fund future operations.

Details of any funds materially in deficit

None

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.

- Income is generated by registrations from schools
- All expenses due are related to the Award
- The Charity does not hold investments
- FY21/22 will see a second major application to Plater Trust for ongoing funding.

None

Section G

Declaration

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

Signed on behalf of the charity's trustees



Signature(s)



Full name(s)

Matthew Quinn
Kay Hopkins

Position (eg Secretary, Chair, etc)

Assistant Chair
Secretary

Date

6 May 2022

Oscar Romero Award Trust

Statement of Financial Activities for the Year Ended 31st August 2021

	Note	Restricted Funds £	Endowment Funds £	Total Funds £	2021 £	2020
INCOME AND ENDOWMENTS FROM:	2					
Donations, Grants and Legacies		33345	0	33345		0
Charitable Activities		2550	0	2550		3175
Other Income		0	0	0		0
Investments		0	0	0		0
TOTAL INCOME		35895	0	35895		3175
EXPENDITURE ON:	3					
Charitable Activities		18290.9	0	18290.9	18509.7	
Other Expenditure		0	0	0	0	0
TOTAL EXPENDITURE		18290.9	0	18290.9	18509.7	
Net Movement in Funds		17604.1	0	17604.1	-15334.7	
Balances brought forward at 1st September 2020		7727.99	0	7727.99	23062.69	
Balances carried forward at 31st August 2021		25332.09	0	25332.09	7727.99	

Balance Sheet as at 31st August 2021

	Note	2021 £	2020 £
Fixed Assets			
Tangible Fixed assets		0	0
Investment assets		0	0
		0	0
Current Assets			
Stock		0	0
Debtors and Prepayments	4	975	1175
Short Term Deposits	5	0	0
Cash at bank and in hand	6	31533.34	12855.2
Loan	7	0	0
		32508.34	14030.2
Liabilities: Amounts Falling Due Within One Year	8	7176.25	6302.21
Net Current Assets	9	25332.09	7727.99
Net Assets		25332.09	7727.99
Funds			
Restricted		25332.09	7727.99
Endowment		0	0
		25332.09	7727.99
			0

Approved by the Trustees and signed on its behalf by
Matthew Quinn

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May 6, 22

Dated

Statement of Financial Activities for the Year Ended 31st August 2021

	Restricted Funds £	Endowment Funds £	Total Funds £	2021	2020
2 Incoming Resources					
Donations, Grants and Contributions					
Donations	0	0	0	0	0
Platter Trust Grant	18345		18345	0	0
Archbishop Romero Grant	5000		5000	0	0
Jesuit Fund for Social Justice Grant	10000		10000	0	0
Sub Total	33345	0	33345	0	0

Income from Charitable Activities

Contributions	2550	0	2550	3175
Sub Total	2550	0	2550	3175

Income Tax recoverable

	0	0	0	0
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Investment Income

Bank and Deposit Account Interest	0	0	0	0
Sub Total	0	0	0	0

Total Incoming Resources

	35895	0	35895	3175
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Restricted Funds	Endowment Funds	Total Funds	2021	2020
£	£	£		

3 Resources Expended

Insurance	0	0	0	262.64
Co-Ordinator Salary Costs	16745.16	0	16745.16	16248.95
Website Setup and Annual Support and Maintenance	847.02	0	847.02	702
Online Meeting Annual Subscription	143.88	0	143.88	0
Postage and Stationary	8.46	0	8.46	77.16
Marketing	0	0	0	232
Certificates Printing	0	0	0	143.84
Hospitality	14.4	0	14.4	6.86
Telephone	50	0	50	80
Travel Expenses	481.98	0	481.98	756.25
Total Resources Expended	18290.9	0	18290.9	18509.7

4 Debtors

			2021	2020
		£		
Oaklands Catholic School & Sixth Form College			0	0
Subscribing Schools various			975	1175
Sub Total			975	1175

5 Short Term Deposits

			2021	2020
		£		
Sub Total			0	0
			0	0

6 Cash at Bank

			2021	2020
		£		
Lloyds Current Account			31533.34	12855.2
Sub Total			31533.34	12855.2

7 Liabilities: Amounts Falling Due Within One Year

			2021	2020
		£		
Creditors				
Oaklands Catholic School - Wages			6956.28	5408.86
Oaklands Catholic School - Other Expenses			219.97	893.35
Sub Total			7176.25	6302.21

8 Analysis of Net Assets By Fund

	Restricted Funds	Endowment Funds	Total Funds	2021	2020
	£	£	£		
Current assets	32508.34	0	32508.34	14030.2	
Current liabilities	7176.25	0	7176.25	6302.21	
Sub Total	25332.09	0	25332.09	7727.99	

Oscar Romero Award Trust

Statement of Financial Activities for the Year Ended 31st August 2021

	Note	Restricted	Endowment	Total Funds	
		Funds	Funds	2021	2020
		£	£	£	£
INCOME AND ENDOWMENTS FROM:	2				
Donations, Grants and Legacies		33345	0	33345	0
Charitable Activities		2550	0	2550	3175
Other Income		0	0	0	0
Investments		0	0	0	0
TOTAL INCOME		35895	0	35895	3175
EXPENDITURE ON:	3				
Charitable Activities		18290.9	0	18290.9	18509.7
Other Expenditure		0	0	0	0
TOTAL EXPENDITURE		18290.9	0	18290.9	18509.7
Net Movement in Funds		17604.1	0	17604.1	-15334.7
Balances brought forward at 1st September 2020		7727.99	0	7727.99	23062.69
Balances carried forward at 31st August 2021		25332.09	0	25332.09	7727.99

Balance Sheet as at 31st August 2021

	Note	2021	2020
		£	£
Fixed Assets			
Tangible Fixed assets		0	0
Investment assets		0	0
		0	0
Current Assets			
Stock		0	0
Debtors and Prepayments	4	975	1175
Short Term Deposits	5	0	0
Cash at bank and in hand	6	31533.34	12855.2
Loan	7	0	0
		32508.34	14030.2
Liabilities: Amounts Falling Due Within One Year	8	7176.25	6302.21
Net Current Assets	9	25332.09	7727.99
Net Assets		25332.09	7727.99
Funds			
Restricted		25332.09	7727.99
Endowment		0	0
		25332.09	7727.99
			0

Approved by the Trustees and signed on its behalf by
Matthew Quinn

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Dated...06.05.2022

Accounting officer: Tim Finch



Dated ...03.03.2022.....

Statement of Financial Activities for the Year Ended 31st August 2021

2 Incoming Resources	Restricted	Endowment	Total Funds	
	Funds	Funds	2021	2020
	£	£	£	
Donations, Grants and Contributions				
Donations	0	0	0	0
Platter Trust Grant	18345		18345	0
Archbishop Romero Grant	5000		5000	0

Jesuit Fund for Social Justice Grant	10000		10000	0
Sub Total	33345	0	33345	0
Income from Charitable Activities				
Contributions	2550	0	2550	3175
Sub Total	2550	0	2550	3175
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	35895	0	35895	3175

Restricted Funds	Endowment Funds	Total Funds	2021	2020
£	£	£		

3 Resources Expended

Insurance	0	0	0	262.64
Co-Ordinator Salary Costs	16745.16	0	16745.16	16248.95
Website Setup and Annual Support and Maintenance	847.02	0	847.02	702
Online Meeting Annual Subscription	143.88	0	143.88	0
Postage and Stationary	8.46	0	8.46	77.16
Marketing	0	0	0	232
Certificates Printing	0	0	0	143.84
Hospitality	14.4	0	14.4	6.86
Telephone	50	0	50	80
Travel Expenses	481.98	0	481.98	756.25
Total Resources Expended	18290.9	0	18290.9	18509.7

4 Debtors

			2021	2020
		£		
Oaklands Catholic School & Sixth Form College			0	0
Subscribing Schools various			975	1175
Sub Total			975	1175

5 Short Term Deposits

			2021	2020
		£		
Sub Total			0	0

6 Cash at Bank

			2021	2020
		£		
Lloyds Current Account			31533.34	12855.2
Sub Total			31533.34	12855.2

7 Liabilities: Amounts Falling Due Within One Year

			2021	2020
		£		
Creditors				
Oaklands Catholic School - Wages			6956.28	5408.86
Oaklands Catholic School - Other Expenses			219.97	893.35
Sub Total			7176.25	6302.21

8 Analysis of Net Assets By Fund

	Restricted Funds	Endowment Funds	Total Funds	2021	2020
	£	£	£		
Current assets	32508.34	0	32508.34	14030.2	
Current liabilities	7176.25	0	7176.25	6302.21	
Sub Total	25332.09	0	25332.09	7727.99	