

**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)<br>Matthew Quinn<br>Dr. Ashley Beck<br>Julie Oldroyd<br>Susannah Watchorn<br>Dr. Marie Cooke (resigned on 13.12.2024)<br>Sr. Jane Livesey<br>Andrew Hollas<br>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<br>Stakes Hill Road<br>Waterlooville<br>PO7 7BW   |
| Email Address  | <a href="mailto:contact@romeroaward.co.uk">contact@romeroaward.co.uk</a>  |
| Website        | <a href="http://www.romeroaward.co.uk">www.romeroaward.co.uk</a>  |

**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 31<sup>ST</sup> 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**  
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**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**

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

- All funds are unrestricted.



**THE OSCAR ROMERO AWARD TRUST**  
**STATEMENT OF ASSETS AND LIABILITIES**

**31 AUGUST 2025**

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

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-imbursement of travel expenses as follows

- Julie Oldroyd £26.30
- Matthew Quinn £72.00

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