

OXFORD ACADEMIC HEALTH PARTNERS

England & Wales · Charity number 1174725

Details

Status Registered

Legal form CIO

Registered 2017-09-19

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

Contact

Address Joint Research Office OUH Cowley
1st Floor Unipart House
Garsington Road
Oxford
Care of Dr Sara Ward
OX4 2PG

Phone 07837 401519

Email megan.turmezei@ouh.nhs.uk

Website www.oahp.org.uk

Activities

Objects: TO ADVANCE HEALTH BY RESEARCH, CLINICAL CARE, EDUCATION AND TRAINING TO PROVIDE SOLUTIONS SO THAT MEDICAL RESEARCH BREAKTHROUGHS LEAD TO DIRECT CLINICAL BENEFITS AND IN PARTICULAR, BUT NOT EXCLUSIVELY BY:(A) PROVIDING INFORMATION AND OPPORTUNITIES TO SHARE INFORMATION BETWEEN ALL MEMBERS OF THE MEDICAL FIELD AND/OR HEALTH CARE SYSTEM INCLUDING BUT NOT LIMITED TO PATIENTS, CLINICIANS, MEDICAL PROVIDERS, RESEARCHERS, HEALTH SERVICES;(B) RAISING AWARENESS AND CARRYING OUT TRAINING PROGRAMMES INVOLVED IN CLINICAL, HEALTH AND/OR SOCIAL CARE;(C) SUPPORTING CLINICAL, HEALTH AND/OR SOCIAL CARE RESEARCH OR RESEARCH DIRECTLY RELATED TO CLINICAL, HEALTH AND/OR SOCIAL CARE AND THE PUBLICATION OF THE USEFUL RESULTS OF THAT RESEARCH, INCLUDING BUT NOT LIMITED TO: (I) DISEASES (BOTH CHRONIC AND ACUTE), IMMUNE RESPONSES, INFECTIONS; (II) TREATMENTS; (III) DRUGS; (IV) DIAGNOSTICS; (V) INTEGRATING HEALTH CARE SYSTEMS;(VI) ANY OTHER TECHNOLOGIES;(D) MAKING GRANTS TO PROJECTS INVOLVED IN CLINICAL, HEALTH AND/OR SOCIAL CARE RESEARCH;(E) PROVIDING INFORMATION, ADVICE AND/OR TRAINING TO HEALTHCARE PROVIDERS, PATIENTS AND ANY USERS OF THE HEALTHCARE SYSTEM;(F) PROGRESSING TECHNOLOGIES, THERAPIES AND TREATMENTS FOR THE BENEFIT OF HUMAN HEALTH;(G) WORKING WITH INDUSTRY, CHARITIES, UNIVERSITIES, THE HEALTH SERVICE AND ANY OTHER RELEVANT BODIES TO ASSIST THE PROGRESS OF SCIENTIFIC DISCOVERIES, MEDICAL BREAKTHROUGHS AND NEW TECHNOLOGIES;(H) SUPPORTING INNOVATION AND IMPROVEMENT IN CLINICAL, HEALTH AND/OR SOCIAL CARE SERVICE DELIVERY INCLUDING BUT NOT LIMITED TO: (I) DISEASES (BOTH CHRONIC AND ACUTE), IMMUNE RESPONSES, INFECTIONS; (II) TREATMENTS; (III) DRUGS; (IV) DIAGNOSTICS; (V) INTEGRATING HEALTH CARE SYSTEMS; (VI) ANY OTHER TECHNOLOGIES.

Activities: Share information and raise awareness and carry out training programmes involved in clinical, health and/or social care; supporting clinical, health and/or social care staff and research including making grants; work with industry, charities, universities, the health service and any other relevant bodies to assist the progress of scientific discoveries, clinical breakthroughs and new technologies.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Provides Services, Acts As An Umbrella Or Resource Body
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives
- **Who:** Other Charities Or Voluntary Bodies, The General Public/mankind

Geography

- Buckinghamshire
- Milton Keynes
- Oxfordshire
- Reading
- Surrey
- Swindon
- Warwickshire
- West Berkshire
- Wiltshire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£12,005	£662	-	-
2024-03-31	£20,000	£8,696	-	-
2023-03-31	£22,598	£56,890	-	-
2022-03-31	£41,200	£25,436	-	-
2021-03-31	£30,000	£0	-	-

Trustees

Name	Role	Appointed
Health Innovation Oxford and Thames Valley		2021-10-29
OXFORD ACADEMIC HEALTH SCIENCE CENTRE (OAHP)		2024-09-21
Oxford Brookes University		2024-09-01
Oxford Health NHS Foundation Trust		2017-03-21
Simon Crowther		2025-04-01
University of Oxford		2017-03-21

OXFORD ACADEMIC HEALTH PARTNERS

England & Wales - Charity number 1174725

Accounts



Trustees' Annual Report for the period

1 APRIL 2024 to 31 MARCH 2025

Charity name: OXFORD ACADEMIC HEALTH PARTNERS

Charity registration number: 1174725

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance health by clinical and medical research, clinical care, education and training to provide solutions so that clinical research breakthroughs lead to direct clinical benefits.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	OAHP will support its purpose through providing grant funding, and hosting functions that fulfil its objectives and the provision of services.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees confirm that they have not varied the constitution of the Charity and therefore as assessed by the Charity commission at formation, comply with PB1 of the Guidance. We also confirm that in preparing this report we have operated OAHP with due regard to Guidance PB2 ensuring that all steps taken to achieve public benefit have been for a charitable purpose.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	No grants were made during this period.
Policy on social investment including program related investment	Para 1.38	OAHP is not intending to use Social Investment as a route to achieve its goals.
Contribution made by volunteers	Para 1.38	OAHP is not using volunteers to undertake charitable activities.
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>£20,000 was granted to the Charity in March 2024 by the Board of the Oxford Academic Health Partners to support the development of the Nursing, Midwifery, Allied Health Professions and Psychology (s) NMAHPPs workforce with a focus on research capacity and capability and delivery of improvements in patient care. (This is a key objective for the Oxford Academic Health Partners an Academic Health Science Centre [AHSC])</p> <p>A working group was established to plan for the event planned for Wednesday 2 July 2025. Planning meetings involving Oxford University, Oxford University Hospitals, Oxford Health and Oxford Brookes University took place throughout the later months of 2024 and January, February and March 2025 and the 'bones' of the Conference and its content were agreed.</p> <p>The call for Abstracts was made in February 2025.</p> <p>The main work took place after the end of the financial period being reported on but it was clear from the outset that the Conference would be very popular.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<p>Further information on the Conference can be seen here in advance of the full report to be made for the financial year 2025/2026.</p> <p>The focus on NMAHPPs is fully aligned with the purpose of the Charity and the goals of the Oxford Academic Health Science Centre, also known as the Oxford Academic Health Partners (OAFP)</p>
Performance of fundraising activities against objectives set	Para 1.41	n/a
Investment performance against objectives	Para 1.41	n/a
Other		n/a

Financial Review

Review of the charity's	Para 1.21	The charity is in a strong financial position at
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financial position at the end of the period		the end of the financial year with contributions from individual partners being made towards the cost of the conference planned for 2 July 2025. The Conference will be delivered at no cost to individual participants and future events are being considered.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	n/a
Amount of reserves held	Para 1.22	n/a
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	n/a

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Funds are made available to the Charity through donations from the individual partners of the Oxford Academic Health Partners, the Academic Health Science Centre.
Investment policy and objectives including any social investment policy adopted	Para 1.46	n/a
A description of the principal risks facing the charity	Para 1.46	n/a
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g. unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more	Para 1.25	Trustees are nominated by the corporate bodies that make up the Oxford Academic Health Partners (AHSC) and (from 1 September 2024) the AHSC itself totalling six in number. All Trustees are members of the Board of

trustees		the Oxford Academic Health Partners (the AHSC)
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Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	Oxford Academic Health Partners
Other name the charity uses	n/a
Registered charity number	1174725
Charity's principal address	c/o Joint Research Office, OUH Cowley Oxford OX4 2PG Correspondence Megan Turmezei, 16 Ashlong Road, Oxford OX3 0NH

Names of the charity trustees who manage the charity (current on 1 January 2026)

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Prof Sir Jonathan Montgomery	Chairman of the Board	From 1 September 2024	Oxford Academic Health Partners (AHSC)
2	Prof Astrid Schloerscheidt	Pro Vice Chancellor, Oxford Brookes University	From 1 August 2024	Oxford Brookes University
3	Mr Simon Crowther	Interim Chief Executive Officer, Oxford University Hospitals NHS FT		Oxford University Hospitals
4	Grant Macdonald	Chief Executive Officer, Oxford Health NHS FT	From 1 January 2025	Oxford Health NHS FT
5	Prof Gavin Screaton	Head of Medical Sciences Division, University of Oxford		University of Oxford
6	Prof Gary Ford	Chief Executive Officer, Health Innovation Oxford and Thames Valley		Health Innovation Oxford and Thames Valley (HIN)

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

Director name		
Sir Jonathan Montgomery		
Prof Astrid Schloerscheidt		
Simon Crowther		
Grant Macdonald		
Prof Gavin Screaton		
Prof Gary Ford		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
n/a		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	n/a
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	n/a
Details of arrangements for safe custody and	n/a

segregation of such assets from the charity's own assets	
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Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

n/a

Exemptions from disclosure

Reason for non-disclosure of key personnel details

n/a



Other optional information

n/a

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Sir Jonathan Montgomery	Megan Turmezei
Position (e.g. Secretary, Chair, etc)	Chair	Secretary
Date	26 January 2026	26 January 2026



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name OXFORD ACADEMIC HEALTH PARTNERS	No (if any) 1174725
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Receipts and payments accounts

For the period from	Period start date 01-Apr-24	To	Period end date 31-Mar-25
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Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					32,775
Partner contributions for conference costs	12,000	-	-	12,000	-
Payment made to keep bank account alive	5	-	-	5	-
	-	-	-	-	-
Sub total (Gross income for AR)	12,005	-	-	12,005	32,775
A2 Asset and investment sales, (see table).					
n/a	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	12,005	-	-	12,005	32,775
A3 Payments					
Reimbursement of payment made to keep bank account current	5	-	-	5	-
Bank charges	60	-	-	60	-
Payment of invoice for Lanyards for NMAHPPs conference - Gifts2Impress	597	-	-	597	-
	-	-	-	-	-
Sub total	662	-	-	662	-
A4 Asset and investment purchases, (see table)					
n/a	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	662	-	-	662	-
Net of receipts/(payments)	11,343	-	-	11,343	32,775
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	32,775	-	-	32,775	-
Cash funds this year end	44,118	-	-	44,118	32,775

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

Categories	Details	Unrestricted funds	Restricted funds	Endowment funds
		to nearest £	to nearest £	to nearest £
B1 Cash funds	Balance at year end	44,118	-	-
	Total cash funds	44,118	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds	Restricted funds	Endowment funds
	Details	to nearest £	to nearest £	to nearest £
B2 Other Monetary Assets	n/a	-	-	-
	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	n/a	-	-	-
	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use	n/a	-	-	-
	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities	n/a	-	-	-
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name		Date of approval
		SIR JONATHAN MONTGOMERY		26-Jan-26
		MEGAN TURMEZEI		26-Jan-26

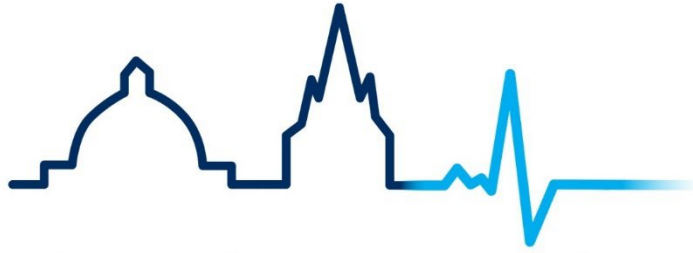
Signed by
Sir Jonathan Montgomery
Megan Turmezei

Trustee and Chair of the OAHP Board
Advisor to the Charity and Secretary to the Board

OXFORD ACADEMIC HEALTH PARTNERS

England & Wales - Charity number 1174725

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Oxford Academic Health Partners
WORLD-CLASS PARTNERSHIPS BRINGING RESEARCH TO LIFE

OXFORD ACADEMIC HEALTH PARTNERS CHARITY #1174725

DOCUMENTS SUBMITTED TO THE CHARITY COMMISSION 23 JANUARY 2025

for the financial year 1 April 2023 to 31 March 2024

OAHP Annual Return (on line)

OAHP Annual Report (attached)

OAHP Annual Accounts (attached)

The public register for the Charity can be found [here](#)



Trustees' annual report (including Directors' report) for the period

From: Period start date 1 April 2023 **to: Period end date** 31 March 2024

Charity name: Oxford Academic Health Partners

Charity registration number: 1174725

Company number:

Objectives and activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance health by clinical and medical research, clinical care, education and training to provide solutions so that clinical research breakthroughs lead to direct clinical benefits.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	OAHP will support its purpose through providing grant funding, and hosting functions that fulfil its objectives and the provision of services.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees confirm that they have not varied the constitution of the Charity and therefore as assessed by the Charity commission at formation, comply with PB1 of the Guidance. We also confirm that in preparing this report we have operated OAHP with due regard to Guidance PB2 ensuring that all steps taken to achieve public benefit have been for a charitable purpose. This reporting period, activity continued in securing modest funds and continuing grant funding for staff employed across the Partners of the Oxford Academic Health Science Centre as detailed below, but we confirm that we have given due regard to Guidance PB3 in this matter.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	Grants were made during the year in line with the Research Development Award scheme established in 2022 – staff eligible for this award were healthcare professionals working in organisations that make up the Oxford Academic Health Science Centre aka Oxford Academic Health Partners (OAHP)

Policy on social investment including program related investment	Para 1.38	OAHP is not intending to use Social Investment as a route to achieve its goals.
Contribution made by volunteers	Para 1.38	OAHP is not using volunteers to undertake charitable activities.
Other		

Achievements and performance

Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>The Charity continued the disbursement of grants approved as part of the Research Development Award instigated in August 2022 following the success of the 2021 OAHP Charity Awards.</p> <p>Payments were made during 2023/2024 to the University of Cardiff, to University of Oxford, to Newcastle University and to Oxford Brookes University; to Oxford University Hospitals (to back fill for hours released for research) and to two individuals for reimbursement of sums they paid for approved courses of study.</p> <p>The Research Development Award continued to focus on the development of research capability and capacity across the Nursing, Midwifery and Allied Health Professions, Pharmacists and Healthcare Scientists (NMAHPPS) working across the four partners.</p> <p>Highlights included the award of Distinction for Zoe Miles, Occupational Therapist, working in Hand surgery at the Nuffield Orthopaedic Centre, in the Module: Research Methods at the University of Derby she undertook with the support of the OAHP Charity. The work covered the following 'What are therapists in England doing postoperatively for CMCJ-OA surgery and why is this relevant.'</p> <p>In addition Amanda Colston, Senior Research Nurse, at the Clinical Research Facility Team Lead, Oxford Health NHS Foundation Trust was awarded a distinction in the second year of her MSc Course, (supported by the Charity) resulting in the award of PGDip in Clinical Research.</p> <p>Both Amanda and Zoe are continuing their studies at the University of Cardiff and University of Derby, respectively.</p>
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		<p>Reports have been received from Award recipients outlining the impact on their individual careers and ways in which improvements/developments in patient care have been achieved.</p> <p>In addition, funds were received in March 2024 following a decision of the Oxford Academic Health Partners Board to award £20,000 to the Charity to continue to support the development of the NMAHPPS workforce with a focus on research and improvements in the delivery of patient care through a Research Showcase planned for the summer of 2025 building on the success of the event held in June 2024.</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	n/a
Investment performance against objectives	Para 1.41	n/a
Other		

Financial review

Review of the charity's financial position at the end of the period	Para 1.21	<p>The year end position is strong with funds available to support the planned Annual/Biannual NMAHPPS Research Showcases to highlight the work across the Partners.</p> <p>All payments associated with the OAHF Research Development Awards have been made and the process is now complete.</p>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	n/a
Amount of reserves held	Para 1.22	n/a
Reasons for holding zero reserves	Para 1.22	n/a

Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	n/a

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, governance and management

Description of charity's trusts:		
Type of governing document: for example, trust deed , memorandum and articles of association etc	Para 1.25	Constitution
How is the charity constituted? for example limited company , unincorporated association , CIO	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustees are nominated by the corporate bodies that make up the Oxford Academic Health Partners (AHSC) and (from 1 September 2024) the AHSC itself totalling six in number. All Trustees are members of the Board of the Oxford Academic Health Partners (the AHSC)

Additional information (optional)

You may choose to include further statements where relevant about:

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Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and administrative details

Charity name	Oxford Academic Health Partners
Other name the charity uses	-
Registered charity number	1174725
Charity's principal address	c/o Joint Research Office, OUH Cowley Oxford OX4 2PG

Names of the charity trustees who manage the charity (= current)

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Sir Jonathan Montgomery	Chairman	Wef 1 September 2024	Oxford Academic Health Partners (AHSC)
2	Prof Linda King	Pro Vice Chancellor, Oxford Brookes University	To 31 July 2024	Oxford Brookes University
2a	Prof Astrid Schloerscheidt	Pro Vice Chancellor, Oxford Brookes University	From 1 August 2024	Oxford Brookes University
3	Prof Meghana Pandit	Chief Executive Office, Oxford University Hospitals NHS FT		Oxford University Hospitals
4	Grant Macdonald	Chief Executive Officer, Oxford Health NHS FT	From 1 January 2025	Oxford Health NHS FT
4a	Karl Marlowe	Chief Medical Officer, Oxford Health NHS FT	To 31 December 2024	Oxford Health NHS FT

6	Prof Gavin Screaton	Head of Medical Sciences Division, University of Oxford		University of Oxford
7	Prof Gary Ford	Chief Executive Officer, Health Innovation Oxford and Thames Valley		Health Innovation Oxford and Thames Valley

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

Director name	
Sir Jonathan Montgomery	
Prof Meghana Pandit	
Mr Grant Macdonald	
Prof Gavin Screaton	
Prof Gary Ford	
Prof Astrid Schloerscheidt	

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (optional information)

Type of adviser	Name	Address
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Name of chief executive or names of senior staff members (optional information)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information



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Declarations

The company has taken advantage of the small companies' exemption in preparing the report above.

The trustees declare that they have approved the trustees' report (including directors' report) above.

Signed on behalf of the charity's trustees/directors

Signature(s)		
Full name(s)	Sir Jonathan Montgomery	Mrs Megan Turmezei
Position (for example Secretary, Chair, etc)	Chairman	Secretary

Date

23 January 2025

23 January 2025

ACCOUNTS for the year ended 31 March 2024



CHARITY COMMISSION
FOR ENGLAND AND WALES

Oxford Academic Health Partners		1174725	CC16a
Receipts and payments accounts			
For the period from	01-Apr-23	To	


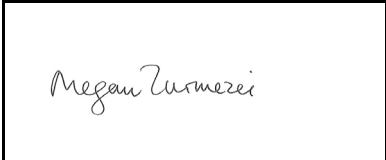
Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts	-	-	-	-	21,471
Donation from the four partners making up the Oxford Academic Health Science Centre (OAHP) contribution from four Partners	20,000	-	-	20,000	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	20,000	-	-	20,000	21,471
A2 Asset and investment sales, (see table).	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	20,000	-	-	20,000	21,471
A3 Payments					
Charity awards	8,636	-	-	8,636	-
Bank charges	60	-	-	60	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	8,696	-	-	8,696	-
A4 Asset and investment purchases, (see table)	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	8,696	-	-	8,696	-
Net of receipts/(payments)	11,304	-	-	11,304	21,471
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	21,471	-	-	21,471	-
Cash funds this year end	32,775	-	-	32,775	21,471

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	balance at year end	32,775	-	-
		-	-	-
		-	-	-
	Total cash funds	32,775	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	Details			
	n/a	-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	n/a		-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	n/a		-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
	n/a		-	

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

Signature	Print Name	Date of approval
	Jonathan Montgomery	23 January 2025
	Megan Turmezei	23 January 2025

Signed by

Sir Jonathan Montgomery, Trustee and Chair of the OAHF Board
Megan Turmezei, Advisor to the Charity and Secretary to the Board

OXFORD ACADEMIC HEALTH PARTNERS

England & Wales - Charity number 1174725

Accounts



Trustees' Annual Report for the period

From 1 April 2022 Period start date To 31 March 2023 Period end date

Charity name: Oxford Academic Health Partners

Charity registration number: 1174725

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance health by research, clinical care, education and training to provide solutions so that clinical research breakthroughs lead to direct clinical benefits.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	OAHP will support its purpose through providing grant funding, and hosting function that fulfil its objectives and the provision of services.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees confirm that they have not varied the constitution of the Charity and therefore as assessed by the Charity commission at formation, comply with PB1 of the Guidance. We also confirm that in preparing this report we have operated OAHP with due regard to Guidance PB2 ensuring that all steps taken to achieve public benefit have been for a charitable purpose. This reporting period, activity has been to secure modest funds and develop an approach to grant funding as detailed below, but we confirm that we have given due regard to Guidance PB3 in this matter.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	Grants and awards from OAHP will be provided and governed through grant conditions with the recipient accepting those conditions for management and reporting on activities supported through OAHP funds. Grant making is an accepted form of providing funds to support research and education, especially in the health and life sciences sector.

		For this reason, the Trustees have chosen this as the route for distributing funds to achieve the aims of OAHF across its Partner organisations.
Policy on social investment including program related investment	Para 1.38	OAHF is not intending to use Social Investment as a route to achieve its goals.
Contribution made by volunteers	Para 1.38	OAHF is not using volunteers to undertake charitable activities.
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>The key activity for the year ending 31 March 2023 was the implementation of the Research Development Award introduced to support the development of research capability, capacity, and clinical academic careers with a focus on the Partners' nurses, midwives, Allied Health Professionals and Pharmacists and with an emphasis on research projects and courses, potential legacy, collaboration, and partnership working and further spread across OAHF.</p> <p>Research evidence drives improvements in the quality of care provided to patients and service users and can yield solutions to some of the day-to-day challenges of delivering high-quality health and care services.</p> <p>Research-active healthcare organisations tend to see better patient outcomes, report higher levels of patient experience, and have better staff recruitment and retention compared with those who are less research active. Across England, the culture and support to include allied health professionals and other frontline workers in clinical research programmes is lacking.</p> <p>The Research Development Award Scheme takes steps to address this, supporting the development of a research culture that is inclusive of all professionals and patients.</p> <p>The scheme is part of OAHF's ongoing strategy of championing research literacy across the clinical and allied health disciplines, to help build and maintain the foundations for</p>

		<p>robust, interdisciplinary health and care research.</p> <p>The initial sum available from the OAHF was £50,000 and this pot was increased to £72,5000 with contributions from NIHR Oxford Biomedical Research Centre (BRC) and NIHR Oxford Health Biomedical Research Centre making the total amount significant. The generosity of the two BRCs is acknowledged as is the contribution (in kind) from the NIHR Oxford and Thames Valley Applied Research Collaboration.</p> <p>Applications were invited on 22 May 2022 and the process closed on 22 July 2022. All 50 applications were acknowledged and individuals kept updated on the process to date.</p> <p>The judging panel, made up senior healthcare professionals, researchers and academics from across the Partners, met on 15 August 2022 and used several criteria in the selection of 26 Awards covering 19 professional groups from four of the OAHF partners. The Awards were ratified by the Board of the Oxford Academic Health Partners at its meeting on 26 August 2022. An update on the Awards is available here</p> <p>The nature of the awards ranged from funding for a MSc in Leadership in Health and Social Care at the University of Derby for OUH Hand Therapist Zoe Miles, funding support for a short-term (three month) collaborative research project between Oxford Health NHS Foundation Trust and the Centre for Suicide Research University of Oxford that focused on suicide and self-harm in nurses. The work was completed and published in the Journal of Advanced Nursing in August 2023 as “Suicidal Thoughts and Behaviours amongst student nurses and midwives”. Other awards included funds to support Amanda Colston, Senior Research Nurse and Team Lead in the Mental Health Clinical Research facility, Oxford Health NHS FT and the NIHR Oxford Health Biomedical Research Centre continue her studies at Cardiff University and is undertaking a systematic review of the aftercare needed for patients who receive genetic results as part of a clinical trial.</p> <p>The interest from a very wide range of individuals from all OAHF Partners was strong and the spread across the organisations was appropriate. The Judging Panel highlighted the overall strong nature of the applications. The Award is regarded as both the means of improving research capacity and capability across the Partners in support of individuals’ learning and development of clinical academic careers and a highly successful means of raising the profile of the Charity, OAHF and its Partners.</p> <p>Reports are being received on the impact of the Awards made particularly in relation to the development of research capability and capacity as a means of personal and professional development and developments in the care of patients and their families.</p>
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		<p>The Award was highlighted in one of the case <u>studies</u> submitted to NIHR in July 2023 in support of the OAHF Annual Report for 2022/2023.</p> <p>An extract is given below:</p> <p>“This knowledge and insight gained by completing my first year of doctorate of nursing, not only transformed my understanding of nursing as a discipline, as an art form and science, but also transformed my clinical practice which directly affects my decisions relating to patient care and the quality of care.” Advanced Nurse Practitioner.</p> <p>“The focus of my PhD is the investigation of the experiences of patients living with musculoskeletal impairments following critical illness, and to inform the development of a complex intervention.” Critical Care Physiotherapist ICU</p> <p>Work in the development of clinical academic careers for non-medical healthcare professionals continues across individual Partners with the strong support of the Oxford Academic Health Partners Board and team.</p> <p>All payments made by the Charity relate to the Awards apart from the regular bank charges made by HSBC.</p> <p>Four Awards from the previous financial year were also made during the year completing the 21/22 Charity Awards.</p> <p>One Awardee from 2021/22, a Consultant in Palliative Care, said “Thank you for the substantial grant of £1500 toward attending the conference and understanding palliative care practice in Quebec province. The conference was of excellent quality I have worked as a specialist in palliative medicine for 25 years and in the field for 30 years and it is rare to learn from almost every speaker. This conference provided that opportunity.”</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	n/a
Performance of fundraising activities against objectives set	Para 1.41	n/a
Investment performance against objectives	Para 1.41	n/a
Other		n/a

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The year end position is strong with funds available to complete the payment of funds to Awardees.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	n/a
Amount of reserves held	Para 1.22	n/a
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	n/a

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Contributions from the Partners and other associated bodies including NIHR Oxford Biomedical Research Centre, NIHR Oxford Health Biomedical Research Centre and NIHR Applied Research Collaborative Oxford and Thames Valley.
Investment policy and objectives including any social investment policy adopted	Para 1.46	n/a
A description of the principal risks facing the charity	Para 1.46	n/a
Other		n/a

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g. unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	The five Trustees are fixed as they are corporate Trustee and there are no plans to expand the group. The Trustee do however appoint representatives to help in the day to day running of the CIO in accordance with its constitution. These were selected and agreed by the Board of Trustees at a board meeting in 2017. In effect the Board of the Oxford Academic Health Partners act in this way.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	n/a
The charity's organisational structure and any wider network with which the charity works	Para 1.51	n/a
Relationship with any related parties	Para 1.51	n/a
Other		n/a

Reference and Administrative details

Charity name	Oxford Academic Health Partners
Other name the charity uses	
Registered charity number	1174724
Charity's principal address	c/o Joint Research Office, OUH Cowley Floor 2 Unipart House, Garsington Road, Oxford OX4 2PG

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	Dr Bruno Holthof	CEO, Oxford University Hospitals, Headley Way, Headington, Oxford, OX3 9DU	To 30 June 2022	Oxford University Hospitals NHS FT
1	Professor Meghana Pandit	CEO, Oxford University Hospitals, Headley Way, Headington, Oxford, OX3 9DU	From 1 July 2022 (interim) and 1 February 2023 (permanent)	Oxford University Hospitals NHS FT
2	Dr Nick Broughton	CEO, Oxford Health NHS FT Warneford Hospital Warneford Lane Headington Oxford OX3 7JX		Oxford Health NHS FT
3	Professor Gavin Sreaton	Head of Medical Sciences Division, Level 3, The John Radcliffe Hospital, Headley Way, Headington Oxford OX3 9DU		University of Oxford

4	Professor Linda King	Pro Vice-Chancellor, Research and Global Partnerships Oxford Brookes University, Headington Rd, Oxford OX3 0BP		Oxford Brookes University
5	Professor Sir John Bell	Chair of OAHP Board and Regius Professor of Medicine, University of Oxford, Old Road, Oxford		
6	Professor Gary Ford	CEO, Health Innovation Oxford and Thames Valley		Health Innovation Oxford and Thames Valley

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

Director name		
Professor Meghana Pandit	OUH NHS FT	
Dr Karl Marlowe	OH NHS FT	Previously Dr Nick Broughton to 30 June 2023
Professor Gavin Screatton	University of Oxford	
Professor Linda King	Oxford Brookes University	
Professor Gary Ford	Health Innovation Oxford and Thames Valley	Formerly Oxford Academic Health Science Network
OAHP		
Professor John Bell	Chairman OAHP Board	
Megan Turmezei	Secretary OAHP Board	

Name of trustees holding title to property belonging to the charity **NONE**

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	n/a
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	n/a
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	n/a

Additional information (optional)

Names and addresses of advisers (Optional information)

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

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

--



Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Professor Sir John Bell	Megan Turmezei
Position (e.g. Secretary, Chair, etc)	Chairman, OAHP Board	Secretary, OAHP Board
Date	25 January 2024	25 January 2024



CHARITY COMMISSION
FOR ENGLAND AND WALES

Oxford Academic Health Partners

1174725

Receipts and payments accounts

CC16a

For the period from	Period start date 01/04/2022	To	Period end date 31/03/2023
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Contribution from Oxford Health BRC	7,500	-	-	7,500	40,000
refund from University of Oxford	98	-	-	98	-
Contribution from Oxford BRC	15,000	-	-	15,000	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	22,598	-	-	22,598	40,000
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	22,598	-	-	22,598	40,000
A3 Payments					
Charity Awards	56,830	-	-	56,830	-
Bank charges	60	-	-	60	-
	-	-	-	-	-
Sub total	56,890	-	-	56,890	-
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	56,890	-	-	56,890	-
Net of receipts/(payments)	- 34,292	-	-	- 34,292	40,000
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	55,763	-	-	55,763	-
Cash funds this year end	21,471	-	-	21,471	40,000

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	balance at year end	21,471	-	-
		-	-	-
	Total cash funds	21,471	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
	<u>Details</u>	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	<u>Details</u>	Fund to which asset belongs	Cost (optional)	Current value (optional)
	<u>Details</u>	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
B5 Liabilities	<u>Details</u>	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
Signed by one or two trustees on behalf of all the trustees		Signature	Print Name	Date of approval
Professor Sir John Bell			John Bell	25-Jan-24

Megan Turmezei

Megan Turmezei

25-Jan-24

OXFORD ACADEMIC HEALTH PARTNERS

England & Wales - Charity number 1174725

Accounts


Trustees' Annual Report for the period
From 01/04/21
To 31/03/22
Charity name: Oxford Academic Health Partners (OAHP)
Charity registration number: 1174725
Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance health by research, clinical care, education and training to provide solutions so that clinical research breakthroughs lead to direct clinical benefits.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	Once we have raised sufficient funds, OAHP will support its purpose through providing grant funding, hosting function that fulfil its objectives and the provision of services.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees confirm that they have not varied the constitution of the Charity and therefore as assessed by the charity commission at formation, comply with PB1 of the Guidance. We also confirm that in preparing this report we have operated OAHP with due regard to Guidance PB2 ensuring that all steps taken to achieve public benefit have been for a charitable purpose. This reporting period, activity has been to secure modest funds and develop an approach to grant funding as detailed below, but we confirm that we have given due regard to Guidance PB3 in this matter.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<p>Grants/awards from OAHP will be provided and governed through grant conditions with the recipient accepting those conditions for management and reporting on activities supported through OAHP funds.</p> <p>Grant making is an accepted form of providing funds to support research and education, especially in the health and life sciences sector.</p>

		For this reason, the Trustees have chosen this as the route for distributing funds to achieve the aims of OAHP.
Policy on social investment including program related investment	Para 1.38	OAHP is not intending to use Social Investment as a route to achieve its goals.
Contribution made by volunteers	Para 1.38	OAHP is not using volunteers to undertake charitable activities.
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>The Charity made a series of awards to staff and students across the Partners. Applications were sought between June and July 2021 with the aim of supporting research, practice and learning across clinical areas. A total of just under £32,000 was made available to 59 staff from Oxford Brookes, Oxford Health NHS FT, Oxford University Hospitals and the University of Oxford. The bulk of this sum (c £25,000) was spent in this financial year (2021/22). The remainder was spent from April 2022 and December 2022.</p> <p>The Board of the Charity, chaired by Professor Sir John Bell, was delighted to be able to make the awards as recommended by the Panel which was made up of staff from across the five Partners. Professor Paul Carding from the Oxford Institute for Nursing, Midwifery and AHP Research welcomed the good broad range of applications made and said that the Panel had been unanimous in its view that all applications should be supported.</p> <p>Professor Keith Channon, Director of the Oxford Academic Health Partners, stressed the important of ensuring that staff and students across the Partners were able to benefit from the Partnership and its activities and that patients across the Partners would also benefit as a result the awards.</p> <p>Applications came from a wide range of staff – clinicians (nursing, psychology, medicine, physiotherapy, radiography, biomedical science,) and managers – and were for a great variety of activities including on-line courses, on-line conferences, development of support for patient involvement, visits to other sites to help in service development, participation in and travel to conferences outside the UK</p>

		<p>(COVID permitting) and a team education and training away day.</p> <p>All the award winners will provide reports on their activities.</p> <p>Plans were developed during 21/22 for the OAH Research Development Award to be introduced across the Partners, with a focus on Nursing, Midwifery and the Allied Health Professions. This Award would be implemented during 2022/2023</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	n/a
Performance of fundraising activities against objectives set	Para 1.41	n/a
Investment performance against objectives	Para 1.41	n/a
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	OAH secured an additional £40,000 of funds from the Trustees to be used for grant making and therefore continues to be supported operationally through in-kind support from the Trustee organisations.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	n/a
Amount of reserves held	Para 1.22	zero
Reasons for holding zero reserves	Para 1.22	OAH is supported by in kind resource from the Trustees has no financial liabilities. All activities are currently undertaken by representatives or employees of the Trustees and therefore undertake duties at no cost to OAH.
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	No uncertainty as the charity is supported by corporate trustees who can provide resource.

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Trustee donations currently are source of income
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Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g. unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustee are fixed as they are corporate Trustee and there are no plans to expand the group. The Trustee do however appoint representatives to help in the day to day running of the CIO in accordance with its constitution. These are selected and agreed by the Board of Trustees at a board meeting.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The charity has the Following hierarchy: Board of Trustees Board of Trustee Representatives Executive Management Team
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	Oxford Academic Health Partners
Other name the charity uses	
Registered charity number	1174725
Charity's principal address	c/o Joint Research Office, OUH Cowley Floor 2 Unipart House, Garsington Road, Oxford OX4 2PG

Description of the assets held in this capacity	none
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	n/a
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Declarations

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

Signed on behalf of the charity's trustees

	Signature(s)	As signed	As signed
	Full name(s)	Sir John Bell	Megan Turmezei
	Position (e.g. Secretary, Chair, etc)	Chair, Board of Trustees	Secretary
	Date	30 January 2023	

Charity Commission Annual Return 2022

OXFORD ACADEMIC HEALTH PARTNERS

Charity registration number: 1174725

Most of the information you give in this form will become publicly available on the Register of Charities. Any field that the Charity Commission will not display will be clearly marked.

This document is a record of the information provided in the Annual Return 2022.

PART A - Charity information

Financial period

Financial period start date

01/04/2021

Financial period end date**Income and spending****Income £****Spending £****Serious Incidents**

For the period of this return, were there any serious incidents in your charity that have not been reported to the Charity Commission?

Fundraising - professional fundraiser

Did your charity raise funds from the public?

Grantmaking

Was grant making the main way your charity carried out its purposes?

Government contracts

During the financial period for this annual return, did the charity receive income from contracts (other than grant agreements) with central government or local authorities?

Government grants

During the financial period for this annual return, did the charity receive income from grants from central government or local authorities?

Income from outside the UK

Did your charity receive income from outside the UK ?

Spending outside England & Wales

Did your charity operate outside England and Wales?

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	Dr Bruno Holthof	CEO, Oxford University Hospitals NHS FT, Headley Way, Headington, Oxford, OX3 9DU		Oxford University Hospitals NHS FT
2	Dr Nick Broughton	CEO, Oxford Health NHS FT Warneford Hospital Warneford Lane Headington Oxford OX3 7JX		Oxford Health NHS FT
3	Professor Gavin Screaton	Head of Medical Sciences Division, Level 3, The John Radcliffe Hospital, Headley Way, Headington Oxford OX3 9DU		University of Oxford
4	Professor Linda King	Pro Vice-Chancellor, Research and Global Partnerships Oxford Brookes University, Headington Rd, Oxford OX3 0BP		Oxford Brookes University
5	Professor Sir John Bell	Regius Professor of Medicine, University of Oxford, Old Road, Oxford		
6				

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

Director name		
OUH	Bruno Holthof	
OH	Nick Broughton	
UoO	Gavin Screaton	
OBU	Linda King	
OAHP	Sir John Bell	Chairman of the OAHP Board
	Megan Turmezei	Secretary to the OAHP Board

Name of trustees holding title to property belonging to the charity - NONE

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

Total Spending outside England & Wales**Trading subsidiaries****Did the charity have any subsidiaries?****Trustee payments****Did any of the trustees receive any remuneration, payments or benefits from the charity other than refunds of legitimate trustee expenses?****Did any of the trustees resign and then take up employment with the charity?****Employees' salaries****Did any of your charity's staff receive total employee benefits of £60,000 or more?
Select No if your charity does not have any staff or does not pay any staff.****For your highest paid member of staff only, what was the total value of their employee benefits?
(For example if your highest paid member of staff received £35,000 enter 35000). If you do not have any staff or did not pay any staff, enter 0 (zero)**

Volunteers

How many UK volunteers, excluding trustees, did the charity have during the financial period?

Financial controls

Did your charity review its internal financial controls?

Privacy statement

Any information you give us will be held securely and processed only in accordance with the rule on data protection. We will not disclose your personal details to anyone unconnected to the Charity Commission unless:

- you have consented to their release; or
- we are legally obliged to disclose them; or
- we regard disclosure as either (a) necessary so that we can properly carry out our statutory functions or (b) necessary in the public interest.

We may share and disclose information about you with relevant public authorities, regulatory bodies and agencies, outside the Charity Commission but only if:

- **we can lawfully do so; and**
- **we decide that disclosure is necessary for national security, crime detection, prevention, and law enforcement, or other issues in the public interest**

Information we collect about you

We will use this information:

To enable us to carry out our statutory functions and duties;

This will include the following actions:

(a) update, consolidate, and improve the accuracy of our records;

(b) undertake crime detection and prevention and law enforcement and assist the third parties specified above to investigate or prevent crime and carry out law enforcement;

(c) data analysis, testing, research, statistical and survey purposes

Information we receive from other sources.

Information we receive from other sources

We may combine this information with information you give to us and information we collect about you.

We may use this information and the combined information for the purposes set out above (depending on the types of information we receive).

We will ensure that any such disclosure and use is proportionate; considers your right to respect for your private life; and is done fairly and lawfully in accordance with the data protection principles of the Data Protection Act.

The Data Protection Act 1998 regulates the use of 'personal data', which is essentially any information, however stored, about identifiable living individuals.

As a 'data controller' under the Act, the Charity Commission must comply with it. Any changes we may make to our privacy statement in the future will be set out in the replacement version of this form.

Please check back frequently to see any updates or changes to our privacy policy.

Declaration

This annual return has not been submitted and no Declaration has been made

RE: Charity Accounts

Reply



Harris, Martin (Finance)(RTH) OUH

To Turmezei, Megan (RTH) OUH

You replied to this message on 18/01/2023 15:13.

Megan

Thanks for the extra information.

So in summary I've reviewed the accounts and am happy with the figures.

Martin

Martin Harris

Assistant Finance Business Partner, Corporate Group Divisions

(working from home – my usual hours are 0800 to 1600hrs)

Oxford University Hospitals NHS Foundation Trust

Tel 01865 (2)23494 [diverts to my mobile] or Microsoft Teams

e-mail: martin.harris2@ouh.nhs.uk

From: Harris, Martin (Finance)(RTH) OUH

Sent: 17 January 2023 16:15

To: Turmezei, Megan (RTH) OUH <Megan.Turmezei@ouh.nhs.uk>

Subject: RE: Charity Accounts

Megan

That looks all sensible.

I asked for something similar last year but could you

- please just let me see sight of the bank statement/screen shot of it showing the balance of £55,763.34.
- please forward any backing/correspondence/emails acknowledging the Dr Adam White OAHP Award refund of £2,093.76 that appears on the statement dated 13-Jan-22.

Many thanks

Martin

Martin Harris

Assistant Finance Business Partner, Corporate Group Divisions

(working from home – my usual hours are 0800 to 1600hrs)

Oxford University Hospitals NHS Foundation Trust

Tel 01865 (2)23494 [diverts to my mobile] or Microsoft Teams

e-mail: martin.harris2@ouh.nhs.uk



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
OXFORD ACADEMIC HEALTH PARTNERS

No (if any)
1174725

Receipts and payments accounts

CC16a

For the period from	Period start date 1.4.2021	To	Period end date 31.3.2022
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Partner contributions	40,000	-	-	40,000	40,000
Refund from Awardee	1,150	-	-	1,150	-
Bank payment	50	-	-	50	-
	-	-	-	-	-
Sub total (Gross income for AR)	41,200	-	-	41,200	40,000
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	41,200	-	-	41,200	40,000
A3 Payments					
Charity awards	25,437	-	-	25,437	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	25,437	-	-	25,437	-

A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	25,437	-	-	25,437	-
Net of receipts/(payments)	15,763	-	-	15,763	40,000
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	40,000	-	-	40,000	-
Cash funds this year end	55,763	-	-	55,763	40,000

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Balance at year end	55,763	-	-
	Total cash funds	55,763	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
B3 Investment assets				
		Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-

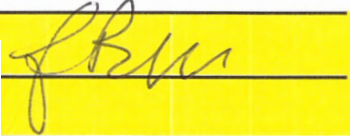
B4 Assets retained for the

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
		-	

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

Signature	Print Name	Date of approval
	John Bell	23/1/23
<i>Megan Turmezei</i>	Megan Turmezei	30/1/2023

OXFORD ACADEMIC HEALTH PARTNERS

England & Wales - Charity number 1174725

Accounts

Oxford Academic Health Partners Charity #1174725

For submission:

- Annual Accounts for the period 1 April 2020 to 31 March 2021 (these have been reviewed by an independent finance professional)

The Board, acting as Trustees for the Charity, approved the above document at its meeting held on 24 January 2022 for submission to the Charity Commission

Megan Turmezei

Megan Turmezei
Secretary to OAHP Charity

24 January 2022



CHARITY COMMISSION
FOR ENGLAND AND WALES

Oxford Academic Health Partners

No (if any)
1174725

Receipts and payments accounts

CC16a

For the period from	Period start date 01/04/2020	To	Period end date 31/03/2021
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
via partner contributions	-	-	-	-	30,000
	-	-	-	-	-
Sub total (Gross income for AR)	-	-	-	-	30,000
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	-	-	-	-	30,000
A3 Payments					
	-	-	-	-	-
Sub total	-	-	-	-	-
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	-	-	-	-	-
Net of receipts/(payments)	-	-	-	-	30,000
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	10,000	-	-	10,000	10,000
Cash funds this year end	10,000	-	-	10,000	40,000

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	via partner contributions	40,000	-	-
		-	-	-
	Total cash funds	40,000	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	Details	-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-	-
		-	-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
		-	-	-
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name		Date of approval
		Prof Sir John Bell Chairman		24 January
		Megan Turmezei Secretary		2022



Trustees' Annual Report for the period

From 01/04/20

To 31/03/21

Charity name: Oxford Academic Health Partners (OAHP)

Charity registration number: 1174725

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance health by research, clinical care, education and training to provide solutions so that clinical research breakthroughs lead to direct clinical benefits.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	Once we have raised sufficient funds, OAHP will support its purpose through providing grant funding, hosting function that fulfil its objectives and the provision of services.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees confirm that they have not varied the constitution of the Charity and therefore as assessed by the charity commission at formation, comply with PB1 of the Guidance. We also confirm that in preparing this report we have operated OAHP with due regard to Guidance PB2 ensuring that all steps taken to achieve public benefit have been for a charitable purpose. This reporting period, activity has been to secure modest funds and develop an approach to grant funding as detailed below, but we confirm that we have given due regard to Guidance PB3 in this matter.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	Grants/awards from OAHP will be provided and governed through grant conditions with the recipient accepting those conditions for management and reporting on activities supported through OAHP funds. Grant making is an accepted form of providing funds to support research and education,

		especially in the health and life sciences sector. For this reason, the Trustees have chosen this as the route for distributing funds to achieve the aims of OAHP. We are developing grant conditions for commencement in 2021/2022 financial year.
Policy on social investment including program related investment	Para 1.38	OAHP is not intending to use Social Investment as a route to achieve its goals.
Contribution made by volunteers	Para 1.38	OAHP is not using volunteers to undertake charitable activities.
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	OAHP received funds from the Trustees to be used for grant making and the mechanism for this is being developed as above. The initial plan is to offer small travel/educational grants to support career development, the dissemination of research evidence or learning new techniques through educational activity

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	n/a
Performance of fundraising activities against objectives set	Para 1.41	n/a
Investment performance against objectives	Para 1.41	n/a
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	OAHP secured £30,000 of funds from the Trustees to be used for grant making and therefore continues to be supported operationally through in-kind support from the Trustee organisations.
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Statement explaining the policy for holding reserves stating why they are held	Para 1.22	
Amount of reserves held	Para 1.22	zero
Reasons for holding zero reserves	Para 1.22	OAHP is supported by in kind resource from the Trustees has no financial liabilities. All activities are currently undertaken by representatives or employees of the Trustees and therefore undertake duties at no cost to OAHP.
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	No uncertainty as the charity is supported by corporate trustees who can provide resource.

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Trustee donations currently are source of income
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed , royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g unincorporated association , CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustee are fixed as they are corporate Trustee and there are no plans to expand the group. The Trustee do however appoint representatives to help in the day to day running of the CIO in accordance with its constitution. These are selected and agreed by the Board of Trustees at a board meeting.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	The charity has the Following hierarchy: Board of Trustees Board of Trustee Representatives Executive Management Team
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	Oxford Academic Health Partners
Other name the charity uses	
Registered charity number	1174725
Charity's principal address	c/o Joint Research Office, OUH Cowley Floor 2 Unipart House, Garsington Road, Oxford OX4 2PG

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	Dr Bruno Holthof,	CEO, Oxford University Hospitals, Headley Way, Headington, Oxford, OX3 9DU		Oxford University Hospitals NHS FT
2	Dr Nick Broughton	CEO, Oxford Health NHS FT Warneford Hospital Warneford Lane Headington Oxford OX3 7JX		Oxford Health NHS FT
3	Professor Gavin Screaton	Head of Medical Sciences Division, Level 3, The John Radcliffe Hospital, Headley Way, Headington Oxford OX3 9DU		University of Oxford
4	Professor Linda King	Pro Vice-Chancellor, Research and Global Partnerships		Oxford Brookes University

		Oxford Brookes University, Headington Rd, Oxford OX3 0BP		
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Corporate trustees – names of the directors at the date the report was approved

Director name		
OUH	Bruno Holthof	
OH	Nick Broughton	
UoO	Gavin Screaton	
OBU	Linda King	
OAHP	Sir John Bell	Chairman of the OAHP Board
	Megan Turmezei	Secretary to the OAHP Board

Name of trustees holding title to property belonging to the charity - NONE

Trustee name	Dates acted if not for whole year	N/A
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Funds held as custodian trustees on behalf of others

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

Declarations

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

Signed on behalf of the charity's trustees

	Signature(s)		
	Full name(s)	Sir John Bell	Megan Turmezei
	Position (e.g. Secretary, Chair, etc)	Chair, Board of Trustees	Secretary
	Date	24 January 2022	