

OXFORD INSIGHT MEDITATION

England & Wales · Charity number 1175855

Details

Status Registered

Legal form CIO

Registered 2017-11-21

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

Contact

Address 55 Bartlemas Road
Oxford
OX4 1XU

Phone 07795171652

Email oxfordinsightmeditation@gmail.com

Website oxfordinsightmeditation.org

Activities

Objects: THE OBJECT OF THE CIO IS TO ADVANCE THE EDUCATION OF THE PUBLIC IN THE SUBJECT OF MEDITATION AND THE TEACHINGS OF THE BUDDHA, IN PARTICULAR BUT NOT EXCLUSIVELY BY SUPPORTING AND ENCOURAGING THE STUDY AND PRACTICE OF BUDDHIST INSIGHT MEDITATION FOR THE PUBLIC BENEFIT, IN PARTICULAR BUT NOT EXCLUSIVELY FOR THE BENEFIT OF PEOPLE IN OXFORD AND THE SURROUNDING AREAS.

Activities: Oxford Insight Meditation supports and encourages the study and practice of Buddhist Insight meditation by organising a varied programme of classes, retreats and meetings. People of all backgrounds and traditions are welcome to participate. Our teachers are widely recognised; they are experienced, trained and bound by a code of ethics.

Classification

- **How:** Provides Services
- **What:** Education/training, Religious Activities
- **Who:** The General Public/mankind

Geography

- Oxfordshire

Finances

| Period end | Income | Expenditure | Assets | Employees |
|------------|--------|-------------|--------|-----------|
| 2024-12-31 | £3,749 | £3,274 | - | - |
| 2023-12-31 | £4,817 | £3,048 | - | - |
| 2022-12-31 | £3,783 | £3,776 | - | - |
| 2021-12-31 | £1,629 | £1,011 | - | - |
| 2020-12-31 | £1,826 | £2,554 | - | - |

Trustees

| Name | Role | Appointed |
|-------------------------------------|------|------------|
| ANDREW FINNEY | | 2017-09-02 |
| BRIGID AVISON | | 2017-09-02 |
| ISABEL TUCKER | | 2017-09-02 |
| Jennifer Kirsten Daniella Nicholson | | 2019-11-17 |
| Kathryn Tulip | | 2017-09-02 |
| PAMELA SUTHERLAND | | 2017-09-02 |

OXFORD INSIGHT MEDITATION

England & Wales - Charity number 1175855

Accounts



Trustees' Annual Report for the period

From 1st January 2024 To 31st December 2024

Charity name: Oxford Insight Meditation

Charity registration number: 1175855

Objectives and Activities

| | SORP reference | |
|--|--------------------|--|
| Summary of the purposes of the charity as set out in its governing document | Para 1.17 | To advance the education of the public in the subject of meditation and the teachings of the Buddha, in particular but not exclusively by supporting and encouraging the study and practice of Buddhist Insight meditation for the public benefit, in particular but not exclusively for the benefit of people in Oxford and the surrounding areas. |
| 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 | <p>Oxford Insight Meditation carries out these purposes by offering a year-round programme of activities and events to the people of Oxford and the surrounding area, giving them the opportunity to study and practise Buddhist Insight Meditation and to learn about the teachings of the Buddha.</p> <p>We invite teachers from Gaia House, a retreat centre in the Insight Meditation tradition, to lead our retreat days. These teachers are highly experienced, widely recognised and bound by a code of ethics.</p> <p>We are committed to creating inclusive spaces. We welcome people irrespective of religious or political beliefs, ethnicity, class, sexual orientation, gender identity, age, ability or culture. It is our hope over time to increase the accessibility of what we offer to people of all backgrounds through developing a more varied programme of events.</p> <p>Oxford Insight Meditation offers activities on a sliding scale; it is committed to ensuring that no one is excluded from any of its activities because of lack of funds. People</p> |

unable to afford the discounted rate may choose a 'freely given' place. Pricing of events is intended to cover the costs of putting on the events; any surplus goes into reserves. The price of events does not cover any payment to teachers. In the longstanding tradition of 'dana', donations to the teacher are invited at the end of the session, in gratitude for their teachings.

The main activities undertaken by the charity to carry out its charitable purposes for the public benefit are as follows:

Teacher-led day retreats – nonresidential day-long retreats in Oxford with respected teachers in the Insight tradition, who offer their teachings free of charge. We ask people to pay a small fee to cover costs but waive this fee where someone is unable to pay it. Donations are invited to support the teachers. The days are suitable for both experienced and new meditators.

Monday sitting group – this evening drop-in group is suitable for both beginners and those with more experience. It aims to enable people who are new to Buddhist meditation to have a taste of the practice, and to support more experienced meditators to practise with others on a regular basis. These evenings consist of guided meditation, teaching and discussion. Some of the sessions are facilitated by experienced teachers and others by peer facilitators or teachers in training. Donations are invited to support the teachers.

Occasional non-residential courses – We occasionally organise and underwrite courses on aspects of meditation practice or the Buddha's teaching, to support the deepening of understanding and to foster a sense of a community amongst practitioners.

Website and e-newsletters – Oxford Insight Meditation keeps in touch with supporters and engages with new people through its website, which has details of events and how to book a place on retreats. We also send out regular email newsletters to two subscriber lists to let recipients know about our activities and other related events: one newsletter is about the day retreats and has

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| | | about 550 recipients, and the other is about the Monday evening drop-in group and has about 328 recipients. |
| 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 complied with their duty to have due regard to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives, in planning charitable activities and when exercising any powers or duties to which the guidance is relevant. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | SORP reference | |
|--|----------------|--|
| Policy on grant making | Para 1.38 | n/a |
| Policy on social investment including program related investment | Para 1.38 | n/a |
| Contribution made by volunteers | Para 1.38 | Trustees receive no remuneration for their work for the charity. All activities are planned and delivered by volunteers. The Trustees are grateful to all of the volunteers who have offered service during the period of this report. Without their regular support and commitment to the organisation, our charitable activities would be significantly reduced. |
| 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 | Para 1.20 | In 2024, we offered nine day-long retreats led by experienced teachers connected to Gaia House. These retreats were offered as hybrid events, with some participants attending in person and others online. This format allows us to accommodate those wishing to attend in person, as well as maintaining accessibility for those with |

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| <p>benefits to society as a whole.</p> | | <p>disabilities or caring responsibilities and those living further away. Each retreat day was well attended, attracting between 20 and 60 participants.</p> <p>The Monday sitting group met three times a month in every month except August. Each month there were two in-person meetings in central Oxford, and one online meeting. Some sessions were led by experienced and trainee teachers, with the rest led by peer facilitators. There were between 6 and 25 people at each session. At the end of each meeting there is an opportunity for participants to stay for a cup of tea and talk to others. In the summer we held a social event for Monday sitting group participants to support community building.</p> <p>The group is thriving with a core of regular participants with a strong commitment to practice. It also attracts many newcomers and beginners.</p> <p>We maintained our fees for our activities at the same rate as the previous year. We were able to cover our costs and make a modest surplus, whilst also making sure that day retreats and the Monday sitting group were financially accessible.</p> |
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Additional information (optional)

You may choose to include further statements where relevant about:

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|---|------------------|--|
| <p>Achievements against objectives set</p> | <p>Para 1.41</p> | |
| <p>Performance of fundraising activities against objectives set</p> | <p>Para 1.41</p> | |
| <p>Investment performance against objectives</p> | <p>Para 1.41</p> | |
| <p>Other</p> | | |

Financial Review

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|--|-----------|--|
| Review of the charity's financial position at the end of the period | Para 1.21 | Oxford Insight Meditation made a surplus of £475 in 2024, less than the previous year's surplus (£1769), mainly due to lower numbers of participants attending day retreats. The total assets at 31 st December 2024 were £6106. Finances will continue to be closely monitored to ensure that the financial resources of the charity are not exhausted. |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | Reserves are held to cover the small number of annual fixed costs (insurance, web hosting, publicity, printing, etc.), and to provide some contingency if events fail to break even. The majority of costs incurred by OIM relate to activities that can be cancelled without incurring significant unrecoverable costs. For this reason, the reserves needed are low. |
| Amount of reserves held | Para 1.22 | £1000 |
| 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 | The principal source of funds of the charity are the fees paid by participants for the various activities that we offer. There are also a small number of donations from members of the public who support our work. |
| 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 | The charity's income is dependent on levels of interest in its activities, and the capacity of attendees to pay fees and/or make donations to cover OIM's costs. The trustees remain mindful of the need to break even (or to generate a small surplus), and have been actively working to reduce costs and |

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| | | <p>increase income, without compromising our policy of ensuring that no one is excluded from our activities because of a lack of funds.</p> <p>One way in which we have kept expenditure down is to find private accommodation for our visiting teachers. Thanks to the generosity of some of our supporters, we have been able to do this again this year.</p> <p>We are always seeking ways to advertise our events more widely.</p> |
| 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 | Foundation Charitable Incorporated Organisation |
| 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 | Appointed by Trustees |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|--|
| Policies and procedures adopted for the induction and training of trustees | Para 1.51 | When there is a vacancy for a trustee, the position is advertised to the OIM mailing list, on our website and other relevant places, and applicants are invited for interview. Suitable applicants are also invited to apply. New trustees are provided with information on their duties as trustees and their legal obligations under charity law. They are also inducted in the work of the charity, its aims and objectives, its constitution and how it operates day to day. |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | Oxford Insight Meditation is part of a network of Insight Meditation groups around the country that are connected with the residential retreat centre Gaia House. We are in regular contact on practice and ethical issues. Whilst we collaborate with these organisations, we are independent, and there is no formal legal or financial relationship with any other organisation. |
| Relationship with any related parties | Para 1.51 | n/a |
| Other | | |

Reference and Administrative details

| | |
|--------------|---------------------------|
| Charity name | Oxford Insight Meditation |
|--------------|---------------------------|

| | |
|-----------------------------|----------------------------------|
| Other name the charity uses | n/a |
| Registered charity number | 1175855 |
| Charity's principal address | 55 Bartlemas Road Oxford OX4 1XU |
| | |

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 | Pamela Ruth Sutherland | Treasurer | | The charity's Trustees |
| 2 | Kathryn Tulip | Secretary | | The charity's Trustees |
| 3 | Isabel Grace Tucker | | | The charity's Trustees |
| 4 | Jennifer Kirsten Daniella Nicholson | | | The charity's Trustees |
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Corporate trustees – names of the directors at the date the report was approved

| Director name | | |
|----------------------|--|--|
| n/a | | |
| | | |
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Name of trustees holding title to property belonging to the charity

| Trustee name | Dates acted if not for whole year | |
|---------------------|--|--|
| n/a | | |
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Funds held as custodian trustees on behalf of others

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|---|-----|
| 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)

| |
|-----|
| n/a |
|-----|

Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

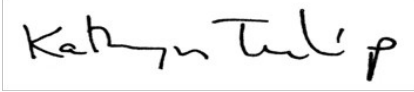
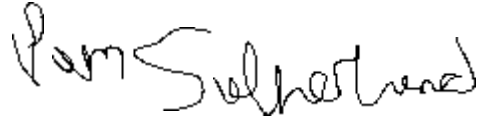
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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

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Full name(s)

| | |
|---------------|------------------------|
| Kathryn Tulip | Pamela Ruth Sutherland |
|---------------|------------------------|

Position (eg Secretary,
Chair, etc)

| | |
|-----------|-----------|
| Secretary | Treasurer |
|-----------|-----------|

Date

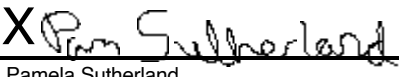
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Oxford Insight Meditation

Accounts for year ended 31 December 2024

| | 2024 | 2023 |
|---|---------------|---------------|
| | £ | £ |
| Income: | | |
| Eventbrite | 2478.96 | 3569.03 |
| Sumup/cash | 133.64 | 352.44 |
| | <hr/> 2612.60 | <hr/> 3921.47 |
| Expenditure: | | |
| Hall hire | -1071.00 | -913.00 |
| Teacher's expenses | -794.14 | -656.12 |
| Other expenses | -587.26 | -719.19 |
| Insurance | -172.20 | -170.80 |
| Drop in: | | |
| Hire | -649.20 | -589.51 |
| Fees | 1039.70 | 843.70 |
| | <hr/> 390.50 | <hr/> 254.19 |
| Donations: | | |
| CAF less fees | 96.40 | 43.38 |
| Sunday Sangha: | | |
| Costs | 0.00 | 0.00 |
| Repayment | 0.00 | 8.67 |
| | <hr/> 0.00 | <hr/> 8.67 |
| Surplus of income over expenditure | <hr/> 474.90 | <hr/> 1768.60 |

| | | |
|------------------------------|----------------|----------------|
| Bank Balance at 31 Dec | 6066.47 | 5591.57 |
| Unpresented cheques | | |
| Cash in hand | 40.00 | 40.00 |
| Total Assets and Liabilities | <u>6106.47</u> | <u>5631.57</u> |

X 
Pamela Sutherland

Approved at AGM 2025

Treasurer

OXFORD INSIGHT MEDITATION

England & Wales - Charity number 1175855

Accounts



Trustees' Annual Report for the period

From 1st January 2023 To 31st December 2023

Charity name: Oxford Insight Meditation

Charity registration number: 1175855

Objectives and Activities

| | SORP reference | |
|--|--------------------|---|
| Summary of the purposes of the charity as set out in its governing document | Para 1.17 | To advance the education of the public in the subject of meditation and the teachings of the Buddha, in particular but not exclusively by supporting and encouraging the study and practice of Buddhist Insight meditation for the public benefit, in particular but not exclusively for the benefit of people in Oxford and the surrounding areas. |
| 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 | <p>Oxford Insight Meditation carries out these purposes by offering a year-round programme of activities and events to the people of Oxford and the surrounding area, giving them the opportunity to study and practise Buddhist Insight Meditation and to learn about the teachings of the Buddha.</p> <p>We invite teachers from Gaia House, a retreat centre in the Insight Meditation tradition, to lead our retreat days. These teachers are highly experienced, widely recognised and bound by a code of ethics.</p> <p>We are committed to creating inclusive spaces. We welcome people irrespective of religious or political beliefs, ethnicity, class, sexual orientation, gender identity, age, ability or culture. It is our hope over time to increase the accessibility of what we offer to people of all backgrounds through developing a more varied programme of events.</p> <p>Oxford Insight Meditation offers activities on a sliding scale; it is committed to</p> |

ensuring that no one is excluded from any of its activities because of lack of funds. People unable to afford the discounted rates will not be turned away. Pricing of events is intended to cover the costs of putting on the events; any surplus goes into reserves. The price of events does not cover any payment to teachers. In the longstanding tradition of 'dana', donations to the teacher are invited at the end of the session, in gratitude for their teachings.

The main activities undertaken by the charity to carry out its charitable purposes for the public benefit are as follows:

Teacher-led day retreats – non-residential day-long retreats in Oxford with respected teachers in the Insight tradition, who offer their teachings free of charge. We ask people to pay a small fee to cover costs but waive this fee where someone is unable to pay it. Donations are invited to support the teachers. The days are suitable for both experienced and new meditators.

Monday sitting group – this evening drop-in group is suitable for both beginners and those with more experience. It aims to enable people who are new to Buddhist meditation to have a taste of the practice, and to support more experienced meditators to practise together on a regular basis. These evenings consist of guided meditation, teaching and discussion. Some of the sessions are facilitated by experienced teachers and others by peer facilitators or teachers in training. Donations are invited to support the teachers.

Occasional non-residential courses – We occasionally organise and underwrite courses on aspects of meditation practice or the Buddha's teaching, to support the deepening of understanding and to foster a sense of a community amongst practitioners.

Website and e-newsletters – Oxford Insight Meditation keeps in touch with supporters and engages with new people through its website, which has details of

| | | |
|--|-----------|---|
| | | events and how to book a place on retreats. We also send out regular email newsletters to two subscriber lists to let recipients know about our activities and other related events: one newsletter is about the day retreats and has about 550 recipients, and the other is about the Monday evening drop-in group and has about 311 recipients. |
| 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 complied with their duty to have due regard to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives, in planning charitable activities and when exercising any powers or duties to which the guidance is relevant. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | SORP reference | |
|--|----------------|---|
| Policy on grant making | Para 1.38 | n/a |
| Policy on social investment including program related investment | Para 1.38 | n/a |
| Contribution made by volunteers | Para 1.38 | Trustees receive no remuneration for their work for the charity. All activities are planned and delivered by volunteers. The Trustees are grateful to all of the volunteers who have offered service during the period of this report. Without their regular support and commitment to the organisation, our charitable activities would be significantly reduced. |
| Other | | |

Achievements and Performance

| | SORP reference | |
|--|----------------|--|
|--|----------------|--|

| | | |
|--|------------------|---|
| <p>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.</p> | <p>Para 1.20</p> | <p>In 2023, we offered eight day-long retreats led by experienced teachers connected to Gaia House. These retreats were offered as hybrid events, with some participants attending in person and others online. This format has been very successful and has helped us to accommodate those wishing to attend in person, as well as maintaining accessibility by those with disabilities or caring responsibilities and those living further away.</p> <p>We maintained our fees at the same rate as the previous year, which allowed us to cover our costs and make a modest surplus, whilst also making sure that retreats were financially accessible. Each retreat day attracted between 20 and 125 participants.</p> <p>The Monday sitting group met three times a month in every month except August. There are two in-person meetings in central Oxford, while one meeting is held online.</p> <p>Some sessions were led by experienced and trainee teachers, with the rest led by peer facilitators. There were between 6 and 20 people at each session.</p> <p>The group is thriving, with a core of regular participants with a strong commitment to practice. It also attracts many newcomers and beginners and offers support to develop their practice. Moving to a cheaper venue has enabled us to invite participants to stay on for half an hour to have tea and talk to others.</p> |
|--|------------------|---|

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|------------------|--|
| <p>Achievements against objectives set</p> | <p>Para 1.41</p> | |
| <p>Performance of fundraising activities against objectives set</p> | <p>Para 1.41</p> | |

| | | |
|---|-----------|--|
| Investment performance against objectives | Para 1.41 | |
| Other | | |

Financial Review

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|--|-----------|--|
| Review of the charity's financial position at the end of the period | Para 1.21 | Oxford Insight Meditation made a surplus of £1768.60 in 2023, a significant increase compared with the previous year (£7.20). The total assets at 31st December 2023 were £5631.57. Finances will continue to be closely monitored to ensure that the financial resources of the charity are not exhausted. |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | Reserves are held to cover the small number of annual fixed costs (insurance, web hosting, publicity, printing, etc.), and to provide some contingency if several day retreats fail to break even. The majority of costs incurred by OIM relate to activities that can be cancelled without incurring significant unrecoverable costs. For this reason, the reserves needed are low. |
| Amount of reserves held | Para 1.22 | £1000 |
| 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 | The principal source of funds of the charity are the fees paid by participants for the various activities that we offer. There are also a small number of donations from members of the public who support our work. |
| 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 | The charity's income is dependent on levels of interest in its activities, and the capacity of attendees to pay booking fees and/or make donations to cover OIM's costs. The trustees are mindful of the need to reverse the trend of recent years of a deficit, and have been actively working to reduce costs and increase income, without compromising our policy |

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| | | <p>of ensuring that no one is excluded from our activities because of a lack of funds. One way in which we can do this is to find private accommodation for our visiting teachers. Thanks to the generosity of some of our supporters, we have been able to do this. We are always seeking ways to advertise our events more widely.</p> |
| 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 | Foundation Charitable Incorporated Organisation |
| 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 | Appointed by trustees |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|---|
| Policies and procedures adopted for the induction and training of trustees | Para 1.51 | When there is a vacancy for a trustee, the position is advertised to the OIM mailing list, on our website and other relevant places, and applicants are invited for interview. Suitable applicants are sometimes invited to apply. New trustees are provided with information on their duties as trustees and their legal obligations under charity law. They are also inducted in the work of the charity, its aims and objectives, its constitution and how it operates day to day. |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | Oxford Insight Meditation is part of a network of Insight Meditation groups around the country that are connected with the residential retreat centre Gaia House. We are in regular contact on practice and ethical issues. Whilst we collaborate with these organisations, we are independent, and there is no formal legal or financial relationship with any other organisation. |
| Relationship with any related parties | Para 1.51 | n/a |
| Other | | |

Reference and Administrative details

| | |
|-----------------------------|----------------------------------|
| Charity name | Oxford Insight Meditation |
| Other name the charity uses | n/a |
| Registered charity number | 1175855 |
| Charity's principal address | 55 Bartlemas Road Oxford OX4 1XU |
| | |

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 | Pamela Ruth Sutherland | Treasurer | | The Charity Trustees |
| 2 | Andrew Martin Finney | | 01/01/2023 - 05/08/2023 | The Charity Trustees |
| 3 | Dione Brigid Avison | | 01/01/2023 - 05/08/2023 | The Charity Trustees |
| 4 | Isabel Grace Tucker | | | The Charity Trustees |
| 5 | Kathryn Tulip | Secretary | | The Charity Trustees |
| 6 | Jennifer Kirsten Daniella Nicholson | | | The Charity Trustees |
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Corporate trustees – names of the directors at the date the report was approved

| Director name | | |
|---------------|--|--|
| n/a | | |
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Name of trustees holding title to property belonging to the charity

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 |
|-----------------|------|---------|
| | | |
| | | |
| | | |
| | | |

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

| |
|--|
| |
|--|

Other optional information

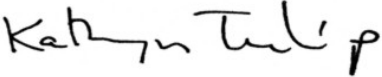
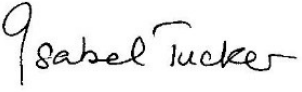
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|--|

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)

| | |
|---------------|---------------------|
| Kathryn Tulip | Isabel Grace Tucker |
|---------------|---------------------|

Position (e.g. Secretary,
Chair, etc)

| | |
|-----------|--|
| Secretary | |
|-----------|--|

Date

| |
|-------------------|
| 21st October 2024 |
|-------------------|

Oxford Insight Meditation
Accounts for year ended 31 December 2023

| | 2023 | 2022 |
|---|-----------------------|-----------------------|
| | £ | £ |
| Income: | | |
| Eventbrite | 3569.03 | 3470.26 |
| Sumup/cash | 352.44 | 141.32 |
| | <u>3921.47</u> | <u>3611.58</u> |
| Expenditure: | | |
| Hall hire | -913.00 | -698.00 |
| Teacher's expenses | -656.12 | -2207.46 |
| Other expenses | -719.19 | -662.63 |
| Insurance | -170.80 | -170.80 |
| Drop in: | | |
| Hire | -589.51 | -224.10 |
| Dana | 843.70 | 186.50 |
| | 254.19 | <u>-37.60</u> |
| Donations: | | |
| CAF less fees | 43.38 | 72.11 |
| Sunday Sangha: | | |
| Costs | 0.00 | 0.00 |
| Repayment | 8.67 | 100.00 |
| | 8.67 | 100.00 |
| Surplus of income over expenditure | <u><u>1768.60</u></u> | <u><u>7.20</u></u> |
| | | |
| Bank Balance at 31 Dec | 5591.57 | 3822.97 |
| Unpresented cheques | | |
| Cash in hand | 40.00 | 48.67 |
| Total Assets and Liabilities | <u><u>5631.57</u></u> | <u><u>3871.64</u></u> |

Approved at AGM 1st September 2024

Pamela Ruth Sutherland

Treasurer

OXFORD INSIGHT MEDITATION

England & Wales - Charity number 1175855

Accounts



Trustees' Annual Report for the period

From 1st January 2022 To 31st December 2022

Charity name: Oxford Insight Meditation

Charity registration number: 1175855

Objectives and Activities

| | SORP reference | |
|--|--------------------|---|
| Summary of the purposes of the charity as set out in its governing document | Para 1.17 | To advance the education of the public in the subject of meditation and the teachings of the Buddha, in particular but not exclusively by supporting and encouraging the study and practice of Buddhist Insight meditation for the public benefit, in particular but not exclusively for the benefit of people in Oxford and the surrounding areas. |
| 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 | <p>Oxford Insight Meditation carries out these purposes by offering a year-round programme of activities and events to the people of Oxford and the surrounding area, giving them the opportunity to study and practise Buddhist Insight Meditation and to learn about the teachings of the Buddha. We regularly invite teachers from Gaia House, a retreat centre in the Insight Meditation tradition, to lead our retreat days. These teachers are highly experienced, widely recognised and bound by a code of ethics.</p> <p>We are committed to creating inclusive spaces. We welcome people irrespective of religious or political beliefs, ethnicity, class, sexual orientation, gender identity, age, ability and culture. It is our hope over time to increase the accessibility of what we offer to people of all backgrounds through developing a more varied programme of events.</p> <p>Oxford Insight Meditation offers activities on a sliding scale; it is committed to</p> |

ensuring that no one is excluded from any of its activities because of lack of funds. People unable to afford the discounted rates will not be turned away. Pricing of events is intended to cover the costs of putting on the events; any surplus goes into reserves. The price of events does not cover any payment to teachers. In the longstanding tradition of 'Dana', donations to the teacher are invited at the end of the session, in gratitude for their teachings.

The main activities undertaken by the charity to carry out its charitable purposes for the public benefit are as follows:

Teacher-led day retreats – non-residential day-long retreats in Oxford with respected teachers in the Insight tradition, who offer their teachings free of charge. We ask people to pay a small fee to cover costs and waive this fee where someone is unable to pay it. Donations are invited to support the teachers. The days are suitable for both experienced and new meditators.

Monday sitting group – this evening drop-in group is suitable for both beginners and those with more experience. It aims to enable people who are new to Buddhist meditation to have a taste of the practice, and to support more experienced meditators to practise together on a regular basis. These evenings consist of guided meditation, teaching and discussion. Some of the sessions are facilitated by experienced teachers and others by peer facilitators or teachers in training. Donations are invited to support the teachers.

Occasional non-residential courses – We occasionally organise and underwrite courses on aspects of meditation practice or the Buddha's teaching, to support the deepening of understanding and to foster a sense of a community amongst practitioners.

Website and e-newsletters – Oxford Insight Meditation keeps in touch with supporters and engages with new people through its website, which has details of events and how to book a place on retreats. We also send out regular email newsletters to two subscriber lists to let

| | | |
|--|-----------|--|
| | | recipients know about our activities and other related events: one newsletter is about the day retreats and has about 400 recipients, and the other is about the Monday evening drop-in group and has about 280 recipients. |
| 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 complied with their duty to have due regard to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives, in planning charitable activities and when exercising any powers or duties to which the guidance is relevant. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | SORP reference | |
|--|----------------|--|
| Policy on grant making | Para 1.38 | n/a |
| Policy on social investment including program related investment | Para 1.38 | n/a |
| Contribution made by volunteers | Para 1.38 | Trustees receive no remuneration for their work for the charity. All activities are planned and delivered by volunteers. The Trustees are grateful to all of the volunteers who have offered service during the period of this report. Without their regular support and commitment to the organisation, our charitable activities would be significantly reduced. |
| 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

In 2022, we offered eight day-long retreats led by experienced teachers connected to Gaia House. These retreats were offered as hybrid events, with some participants attending in person and others online. This format has been very successful and has helped us to accommodate those wishing to attend in person, as well as maintaining accessibility to those still shielding from Covid-19, those with disabilities or caring responsibilities and those living further away. Appropriate Covid-related measures continued to be taken at the in-person retreats. We reintroduced (and increased) fees for participation to help us cover the higher cost of in-person meetings (venue hire, teachers expenses, refreshments, etc.), whilst balancing this with making sure that retreats are accessible to all. Each retreat day attracted between 25 and 120 participants.

The Monday sitting group met throughout the year. The frequency of sessions was initially reduced from weekly to monthly from January to April. The group was then put on hold, owing to a lack of capacity amongst the original teachers, for the rest of the spring and summer. A small number of trustees and some experienced practitioners, came together to reimagine and relaunch the Monday sitting group sessions in September 2022. The group met twice a month to the end of the year, alternating between in-person meetings in central Oxford and online meetings. Experienced and trainee teachers led some of the sessions, with the rest led by peer facilitators. There were between 10 and 25 people at each session. The group is now thriving again. It has a core of regular participants with a strong commitment to practice, and offers

| | | |
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| | | <p>connection and support for practice – a dedicated community of practitioners is developing. It also attracts many newcomers and beginners. Some of these have been to retreats at Gaia House and decided to find a group to meditate with locally, while others have simply decided to come and meditate for the evening.</p> <p>The Sunday morning meditation group (Sunday Sangha) remained suspended throughout the year.</p> <p>We didn't offer any study courses in the period because the trustees lacked the capacity to organise additional events.</p> |
|--|--|--|

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 | Oxford Insight Meditation made a small surplus of £7.20 in 2022. The total assets at 31st December 2022 were £3,822.97, a slight reduction compared with the previous year (£3,964). Finances will continue to be closely monitored to ensure that the financial resources of the charity are not exhausted. |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | Reserves are held to cover the small number of annual fixed costs (insurance, web hosting, publicity, printing, etc.), and to provide some contingency if several day retreats fail to break even. The majority of costs incurred by OIM relate to activities that can be cancelled without incurring significant unrecoverable costs. For this reason, the reserves needed are low. |
| Amount of reserves held | Para 1.22 | £1000 |
| 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 | The principal source of funds is the fees paid by participants for the various activities that we offer, but there are also donations from members of the public who support our work. |
| 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 | The charity's income is dependent on levels of interest in its activities, and the capacity of attendees to pay booking fees and/or make donations to cover OIM's costs. The trustees are mindful of the need to reverse the trend of recent years of a deficit, and are actively considering ways to reduce costs and increase income, without compromising our policy of ensuring that no one is |

| | | |
|-------|--|--|
| | | <p>excluded from our activities because of a lack of funds. One way in which we are able to do this is to find private accommodation for our visiting teachers. Thanks to the generosity of some of our supporters, and following the decreased risk of Covid, we are managing to do this.</p> |
| 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 | Foundation Charitable Incorporated Organisation |
| 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 | Appointed by Trustees |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|---|
| Policies and procedures adopted for the induction and training of trustees | Para 1.51 | When there is a vacancy for a trustee, the position is advertised to the OIM mailing list, on our website and other relevant places, and applicants are invited for interview. New trustees are provided with information on their duties as trustees and their legal obligations under charity law. They are also inducted in the work of the charity, its aims and objectives, its constitution and how it operates day to day. |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | Oxford Insight Meditation is part of a network of Insight Meditation groups around the country that are connected with the residential retreat centre Gaia House. We are in regular contact on practice and ethical issues. Whilst we collaborate with these organisations, we are independent, and there is no formal legal or financial relationship with any other organisation. |
| Relationship with any related parties | Para 1.51 | n/a |
| Other | | |

Reference and Administrative details

| | |
|--------------|---------------------------|
| Charity name | Oxford Insight Meditation |
|--------------|---------------------------|

| | |
|-----------------------------|----------------------------------|
| Other name the charity uses | n/a |
| Registered charity number | 1175855 |
| Charity's principal address | 55 Bartlemas Road Oxford OX4 1XU |
| | |

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 | Pamela Ruth Sutherland | Treasurer | | The Charity Trustees |
| 2 | Andrew Martin Finney | | | The Charity Trustees |
| 3 | Dione Brigid Avison | | | The Charity Trustees |
| 4 | Isabel Grace Tucker | | | The Charity Trustees |
| 5 | Kathryn Tulip | Secretary | | The Charity Trustees |
| 6 | Jennifer Kirsten Daniella Nicholson | | | The Charity Trustees |
| 7 | | | | |
| 8 | | | | |
| 9 | | | | |
| 10 | | | | |
| 11 | | | | |
| 12 | | | | |
| 13 | | | | |
| 14 | | | | |
| 15 | | | | |
| 16 | | | | |
| 17 | | | | |
| 18 | | | | |
| 19 | | | | |
| 20 | | | | |

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

| Director name | | |
|---------------|--|--|
| 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 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 |
|-----------------|------|---------|
| | | |
| | | |
| | | |
| | | |

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

| |
|--|
| |
|--|

Other optional information

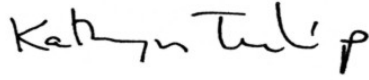
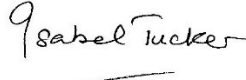
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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

| | |
|---|---|
|  |  |
|---|---|

Full name(s)

| | |
|---------------|---------------------|
| Kathryn Tulip | Isabel Grace Tucker |
|---------------|---------------------|

Position (eg Secretary, Chair, etc)

| | |
|-----------|---------|
| Secretary | Trustee |
|-----------|---------|

Date

| |
|---------------------|
| 20th September 2023 |
|---------------------|

Oxford Insight Meditation

Accounts for year ended 31 December 2022

| | 2022 | 2021 |
|---|-------------------|---------------------|
| | £ | £ |
| Income: | | |
| Eventbrite | 3470.26 | 1183.47 |
| Cheque/cash | 141.32 | 30.00 |
| | <hr/> 3611.58 | <hr/> 1213.47 |
| Expenditure: | | |
| Hall hire | -698.00 | -130.00 |
| Teacher's expenses | -2207.46 | -131.08 |
| Other expenses | -662.63 | -578.95 |
| Insurance | -170.80 | -170.80 |
| Drop in: | | |
| Hire | -224.10 | -0.00 |
| Dana | 186.50 | 262.80 |
| | <hr/> -37.60 | <hr/> 262.80 |
| Donations: | | |
| CAF less fees | 72.11 | 152.54 |
| Sunday Sangha: | | |
| Costs | 0.00 | 0.00 |
| Repayment | 100.00 | 0.00 |
| | <hr/> 100.00 | <hr/> 0.00 |
| Surplus of income over expenditure | <hr/> 7.20 | <hr/> 617.98 |

| | | |
|------------------------------|----------------|----------------|
| Bank Balance at 31 Dec | 3815.77 | 3817.55 |
| Unpresented cheques | | |
| Cash in hand | 48.67 | 148.67 |
| Total Assets and Liabilities | <u>3822.97</u> | <u>3964.44</u> |

Approved at AGM 5th August 2022

Treasurer Pamela Sutherland

OXFORD INSIGHT MEDITATION

England & Wales - Charity number 1175855

Accounts



Trustees' Annual Report for the period

From 1st January 2021 To 31st December 2021

Charity name: Oxford Insight Meditation

Charity registration number: 1175855

Objectives and Activities

| | SORP reference | |
|--|--------------------|--|
| Summary of the purposes of the charity as set out in its governing document | Para 1.17 | To advance the education of the public in the subject of meditation and the teachings of the Buddha, in particular but not exclusively by supporting and encouraging the study and practice of Buddhist Insight meditation for the public benefit, in particular but not exclusively for the benefit of people in Oxford and the surrounding areas. |
| 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 | <p>Oxford Insight Meditation carries out these purposes by offering a year-round programme of activities and events to the people of Oxford and the surrounding area, giving them the opportunity to study and practise Buddhist Insight Meditation and to learn about the teachings of the Buddha. We regularly invite teachers from Gaia House, a retreat centre in the Insight Meditation tradition, to lead our retreat days. These teachers are highly experienced, widely recognised and bound by a code of ethics. We are committed to creating inclusive spaces. We welcome people irrespective of religious or political beliefs, ethnicity, class, sexual orientation, gender identity, age, ability and culture. It is our hope over time to increase the accessibility of what we offer to people of all backgrounds through developing a more varied programme of events.</p> <p>Oxford Insight Meditation offers activities on</p> |

| | |
|--|---|
| | <p>a sliding scale; it is committed to ensuring that no one is excluded from any of its activities because of lack of funds. People unable to afford the discounted rates will not be turned away. Pricing of events is intended to cover the costs of putting on the events; any additional income goes towards building up reserves. The price of events does not cover any payment to teachers. In the longstanding tradition of 'Dana', donations to the teacher are invited at the end of the session, in gratitude for their teachings.</p> <p>The main activities undertaken by the charity to carry out its charitable purposes for the public benefit are as follows:</p> <p>Teacher-led day retreats – non-residential day-long retreats in Oxford with respected teachers in the Insight tradition, who offer their teachings free of charge. We ask people to pay a small fee to cover costs and waive this fee where someone is unable to pay it. Donations are invited to support the teacher. The days are suitable for both experienced and new meditators.</p> <p>Weekly drop-in group – this weekly evening drop-in aims to enable people who are new to Buddhist meditation to have a taster of the practice supported by experienced practitioners, and to support more experienced meditators to practice together on a regular basis. These evenings consist of guided meditation, teaching and discussion. The sessions are facilitated by experienced teachers and those in training and are occasionally peer-led. Donations are invited to support the teacher.</p> <p>Occasional non-residential courses – Oxford Insight Meditation occasionally organises and underwrites courses on aspects of the Buddha's teaching and meditation practice, to support the deepening of understanding and to foster a sense of a community of practitioners.</p> <p>Website and e-newsletter – Oxford Insight</p> |
|--|---|

| | | |
|--|-----------|--|
| | | Meditation keeps in touch with supporters and engages with new people through its website which has details of events and how to book a place on retreats. We also send out regular email newsletters to a subscriber list of just under 400 people to let them know about our activities and other related events. |
| 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 complied with their duty to have due regard to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives, in planning charitable activities and when exercising any powers or duties to which the guidance is relevant. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | SORP reference | |
|--|----------------|--|
| Policy on grant making | Para 1.38 | n/a |
| Policy on social investment including program related investment | Para 1.38 | n/a |
| Contribution made by volunteers | Para 1.38 | Trustees receive no remuneration for their work for the charity. All activities are planned and delivered by volunteers. The Trustees are grateful to all of the volunteers who have offered service during the period of this report. Without their regular support and commitment to the organisation, our charitable activities would be significantly reduced. |
| Other | | n/a |

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

During the year, Covid-19 continued to significantly impact our activities, with events remaining mostly online and with some suspended.

We offered nine day-long retreats led by experienced teachers connected to Gaia House. We offered eight of these retreat days online, including a day jointly offered with Sheffield Insight Meditation. Towards the end of the year we experimented with a hybrid retreat day, with some participants attending in person and others online. This new format was very successful and helped us to accommodate those wishing to come in person again, as well as maintaining accessibility to those still shielding, those with disabilities or caring responsibilities and those living further away. Appropriate Covid-related measures were taken at the venue. The retreat days attracted between 25 and 100 participants each.

We offered the online retreat days free of charge but invited donations to help cover our costs. For our new hybrid retreat day, we reintroduced fees for participation (both online and in person), to help us cover the higher cost of in-person meetings (venue hire, refreshments, etc.) and to help us make up some of the shortfall in revenues of previous years.

The weekly drop-in group met throughout the year with its usual summer break in August. In the earlier part of the year all meetings were online. From September, the group met in person once a month and online in the intervening weeks. Experienced and trainee teachers led most of the sessions, and where there were gaps the group was invited to participate in the 'Online Dharma Hall' at Gaia House to maintain continuity. There were between 10 and 25 people at each session. The group has developed a core of regular participants with a strong commitment to practice and a deep sense of community.

The Sunday Morning Meditation group remained suspended throughout the year.

| | | |
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| | | <p>We didn't offer any study courses in the period because the trustees lacked the capacity to organise additional events.</p> <p>We completed the redesign and rebuilding of our website, which we hope will make our activities and events more appealing and accessible. As part of this, we revamped the resources pages and included more resources offering an introduction to Insight Meditation in a variety of formats. We also created a CAF Donate button to make it easier for people to make donations.</p> |
|--|--|--|

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 1.2 | Oxford Insight Meditation made a small surplus of £618 in 2021, an improvement on the previous year when the charity incurred a loss (£728) arising from the impacts of Covid. Income was still below pre-Covid levels, due to many of the year's activities remaining online and some activities being curtailed. The total assets at 31st December 2021 were £3,964. |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | Reserves are held to cover the small number of annual fixed costs (insurance, web hosting, publicity, printing, etc.), and to provide some contingency if several day retreats fail to break even. The majority of costs incurred by OIM relate to activities that can be cancelled without incurring significant unrecoverable costs. For this reason, the reserves needed are low. Finances will be closely monitored at this time to ensure that the financial resources of the charity are not exhausted. |
| Amount of reserves held | Para 1.22 | £1000 |
| 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 | The principal source of funds are the fees paid by participants for the various activities that we offer as well as donations from members of the public who support our work. |
| 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 | The charity's income is dependent on levels of interest in its activities, and the capacity of attendees to pay booking fees and/or make donations to cover OIM's costs. The trustees are mindful of the need to reverse the trend of recent years of a deficit, and are actively considering ways to reduce costs and increase income, without compromising |

| | | |
|-------|--|--|
| | | our policy of ensuring that no one is excluded from our activities because of a lack of funds. |
| 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 | Foundation Charitable Incorporated Organisation |
| 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 | Appointed by Trustees |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|---|
| Policies and procedures adopted for the induction and training of trustees | Para 1.51 | When there is a vacancy for a trustee, the position is advertised to the OIM mailing list, on our website and other relevant places, and applicants are invited for interview. New trustees are provided with information on their duties as trustees and their legal obligations under charity law. They are also inducted in the work of the charity, its aims and objectives, its constitution and how it operates day to day. |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | Oxford Insight Meditation is part of a network of Insight Meditation groups around the country that are connected with the residential retreat centre Gaia House. We are in regular contact on practice and ethical issues. Whilst we collaborate with these organisations, we are independent, and there is no formal legal or financial relationship with any other organisation. |
| Relationship with any related parties | Para 1.51 | n/a |
| Other | | n/a |

Reference and Administrative details

| | |
|-----------------------------|---------------------------|
| Charity name | Oxford Insight Meditation |
| Other name the charity uses | n/a |

| | |
|-----------------------------|----------------------------------|
| Registered charity number | 1175855 |
| Charity's principal address | 55 Bartlemas Road Oxford OX4 1XU |
| | |

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 | Pamela Ruth Sutherland | Treasurer | | The Charity Trustees |
| 2 | Andrew Martin Finney | | | The Charity Trustees |
| 3 | Dione Brigid Avison | | | The Charity Trustees |
| 4 | Isabel Grace Tucker | | | The Charity Trustees |
| 5 | Kathryn Tulip | Secretary | | The Charity Trustees |
| 6 | Jennifer Kirsten Daniella Nicholson | | | The Charity Trustees |
| 7 | | | | |
| 8 | | | | |
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Corporate trustees – names of the directors at the date the report was approved

| Director name | | |
|----------------------|--|--|
| n/a | | |
| | | |
| | | |
| | | |
| | | |

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 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

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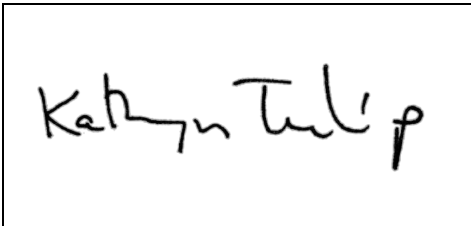
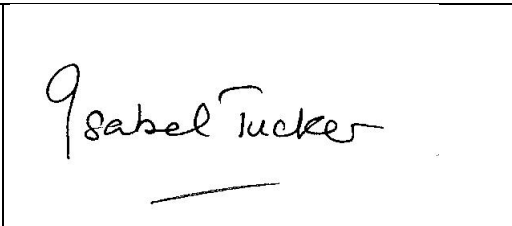
Other optional information

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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) | Kathryn Tulip | Isabel Grace Tucker |
| Position (eg Secretary, Chair, etc) | Secretary and Trustee | Trustee |
| Date | 29/10/22 | |

Oxford Insight Meditation
Accounts for year ended 31 December 2021

| | 2021 | 2020 |
|---|-----------------------|-----------------------|
| | £ | £ |
| Income: | | |
| Eventbrite | 1183.47 | 1826.50 |
| Cheque/cash | 30.00 | 0.00 |
| | <u>1213.47</u> | <u>1826.50</u> |
| Expenditure: | | |
| Hall hire | -130.00 | -795.00 |
| Teacher's expenses | -131.08 | -295.13 |
| Other expenses | -578.95 | -820.91 |
| Insurance | -170.80 | -170.80 |
| Drop in: | | |
| Hire | 0.00 | -583.20 |
| Dana | 262.80 | 220.40 |
| | <u>262.80</u> | <u>-362.80</u> |
| Donations: | | |
| CAF less fees | 152.54 | |
| Sunday Sangha: | | |
| Costs | 0.00 | -110.00 |
| Dana | 0.00 | 0.00 |
| | <u>0.00</u> | <u>-110.00</u> |
| Surplus of income over expenditure | <u><u>617.98</u></u> | <u><u>-728.14</u></u> |
| | | |
| PayPal balance at 31 Dec | 0.00 | 215.25 |
| Bank Balance at 31 Dec | 3815.77 | 3197.79 |
| Unpresented cheques | | |
| Cash in hand | <u>148.67</u> | <u>148.67</u> |
| Total Assets and Liabilities | <u><u>3964.44</u></u> | <u><u>3561.71</u></u> |

OXFORD INSIGHT MEDITATION

England & Wales - Charity number 1175855

Accounts



Trustees' Annual Report for the period

From 1/1/20 Period start date To 31/12/20 Period end date

Charity name: Oxford Insight Meditation

Charity registration number: 1175855

Objectives and Activities

| | SORP reference | |
|--|--------------------|---|
| Summary of the purposes of the charity as set out in its governing document | Para 1.17 | To advance the education of the public in the subject of meditation and the teachings of the Buddha, in particular but not exclusively by supporting and encouraging the study and practice of Buddhist Insight meditation for the public benefit, in particular but not exclusively for the benefit of people in Oxford and the surrounding areas. |
| 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 | Oxford Insight Meditation carries out these purposes by offering a year-round programme of activities and events to the people of Oxford and the surrounding area, giving them the opportunity to study and practise Buddhist Insight Meditation and to learn about the teachings of the Buddha. We regularly invite teachers from Gaia House, a retreat centre in the Insight Meditation tradition, to lead our retreat days. These teachers are highly experienced, widely recognised and bound by a code of ethics. We are committed to creating inclusive spaces. We welcome people irrespective of religious or political beliefs, ethnicity, class, sexual orientation, gender identity, age, ability and culture. It is our hope over time to increase the accessibility of what we offer to people of all backgrounds through developing a more varied programme of events. |

| | |
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| | <p>Oxford Insight Meditation offers activities on a sliding scale; it is committed to ensuring that no one is excluded from any of its activities because of lack of funds. People unable to afford the discounted rates will not be turned away. Pricing of events is intended to cover the costs of putting on the events; any additional income goes towards building up reserves. The price of events does not cover any payment to teachers. In the longstanding tradition of 'Dana', donations to the teacher are invited at the end of the session, in gratitude for their teachings.</p> <p>The main activities undertaken by the charity to carry out its charitable purposes for the public benefit are as follows:</p> <p>Teacher-led day retreats – non-residential day-long retreats in Oxford with respected teachers in the Insight tradition, who offer their teachings free of charge. We ask people to pay a small fee to cover costs and waive this fee where someone is unable to pay it. Donations are invited to support the teacher. The days are suitable for both experienced and new meditators.</p> <p>Weekly drop-in group -- a weekly evening drop-in session is offered free of charge. The drop-in aims to enable people who are new to Buddhist meditation to have a taster of the practice supported by experienced practitioners, and to support regular meditators to practise together on a weekly basis. These evenings consist of guided meditation, teaching and discussion. The sessions are facilitated by experienced teachers and those in training and are occasionally peer-led. Donations are invited to support the teacher.</p> <p>Sunday Morning Meditation – a monthly session on Sundays to support the development of stronger relationships within the Oxford community. The sessions consist of guided meditation, teaching, discussion and a shared lunch. The sessions</p> |
|--|---|

| | | |
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| | | <p>are peer-led with occasional visits from teachers. A small charge is made to cover the cost of the venue. The sessions are suitable for both experienced and new meditators.</p> <p>Occasional non-residential courses – Oxford Insight Meditation occasionally organises and underwrites courses on aspects of the Buddha’s teaching and meditation practice, to support the deepening of understanding and to foster a sense of a community of practitioners.</p> <p>Website – Oxford Insight Meditation keeps in touch with supporters and engages with new people through its website which has details of events and how to book a place. We also send out regular email newsletters to a subscriber list of just under 400 people to let them know about our activities and other related events.</p> |
| 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 complied with their duty to have due regard to the guidance contained in the Charity Commission’s general guidance on public benefit when reviewing the charity’s aims and objectives, in planning charitable activities and when exercising any powers or duties to which the guidance is relevant. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | SORP reference | |
|--|----------------|---|
| Policy on grant making | Para 1.38 | n/a |
| Policy on social investment including program related investment | Para 1.38 | n/a |
| Contribution made by volunteers | Para 1.38 | Trustees receive no remuneration for their work for the charity. All activities are planned and delivered by volunteers. The Trustees are grateful to all of the volunteers |

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|-------|--|--|
| | | who have offered service during the period of this report. Without their regular support and commitment to the organisation, our charitable activities would be significantly reduced. |
| Other | | n/a |

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 1.20spaces | <p>During the period of this report COVID 19 significantly impacted planned activities, most events moved online and some were suspended.</p> <p>During the period of the report we planned to offer 8 in person daylong retreats led by experienced teachers connected to Gaia House. We were able to offer two of the retreats in-person, one was cancelled in April and 5 were offered on-line. In addition we added an online evening session with a US based teacher. Moving online will inevitably have impacted access for those, mainly older people, who don't have regular internet access. Online retreats did however make our events accessible to a wider range of people with disabilities or with caring responsibilities. We also saw an increased number of people joining us from outside the Oxfordshire area. On average between 30 -90 people attended each day retreat.</p> <p>The weekly sitting group met throughout the year with its usual summer break from late July to early September. In the early part of the year the meetings were in person and in March moved online. Experienced and trainee teachers led most of the sessions and where there were gaps the group meditated with another online group at Gaia House to maintain the continuity of the group. There were between 10-25</p> |

| | | |
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| | | <p>people at each session. The group has developed a core of regular participants with a strong commitment to practice and a deep sense of community.</p> <p>The Sunday Morning Meditation group met twice during the period, in January and February. COVID 19 restrictions prevented the group meeting in person after that and meetings were suspended for the rest of the year. The group did not move online, as many of the core group of participants were unable to access online spaces and the important social aspects of the meeting, such as informal conversations and shared lunch, were not possible online.</p> <p>We didn't offer any study courses in the period due to lack of capacity amongst the trustees for organising additional events.</p> <p>We upgraded our online ticketing process to make access easier and moved from requesting payment to attend the retreat days to inviting donations to cover our much reduced costs. We also began the much needed redesigning and rebuilding our website.</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

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|--|-----------|---|
| Review of the charity's financial position at the end of the period | Para 1.21 | The charity made a loss of £728.14 due to the impacts of COVID 19 during this period. Both income and operating costs were significantly reduced (60%) due to the need to move all activities online for most of the year. Most of the over spend during the period is due to the costs of a vital redesign of our website. The total net assets at 31 December 2020 were £3,561.71, represented by cash at the bank and in hand. |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | Due to the COVID 19 pandemic, both operating costs and income were much reduced. Currently income is covering our few remaining costs for IT and general administration. However, we have held our reserve level at £1,000 as we anticipate a return to in person retreats next year. Finances will be closely monitored at this time to ensure that the financial resources of the charity are not exhausted. |
| Amount of reserves held | Para 1.22 | £1000 |
| Reasons for holding zero reserves | Para 1.22 | |
| Details of fund materially in deficit | Para 1.24 | |
| Explanation of any uncertainties about the charity continuing as a going concern | Para 1.23 | |

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 | The principal source of funds are the fees paid by participants for the various activities that we offer, together with donations made by our supporters |
| 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 | The charity's income is dependent on levels of interest in its activities, and the capacity of attendees to pay booking fees and/or |

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| | | make donations to cover OIM's costs. The trustees are mindful of the need to reverse the trend of the past several years of a net deficit, and are actively considering ways to reduce costs and increase income, without compromising our policy of ensuring that no-one is excluded from our activities because of a lack of funds. |
| 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 | Foundation Charitable Incorporated Organisation |
| 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 | Appointed by Trustees |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|--|
| Policies and procedures adopted for the induction and training of trustees | Para 1.51 | When there is a vacancy for a trustee, the position is advertised to the OIM mailing list and applicants are invited for interview. New trustees are provided with information on their duties as trustees and their legal obligations under charity law. They are also inducted in the work of the charity, its aims and objectives, its constitution and how it operates day to day. |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | We are part of a network of Insight Meditation groups around the country that are connected with the residential retreat centre Gaia House. We are in regular contact on practice and ethical issues. Whilst we collaborate with these organisations we are independent, and there is no formal legal or financial relationship with any other organisation. |
| Relationship with any related parties | Para 1.51 | n/a |
| Other | | n/a |

Reference and Administrative details

| | |
|-----------------------------|----------------------------------|
| Charity name | Oxford Insight Meditation |
| Other name the charity uses | |
| Registered charity number | 1175855 |
| Charity's principal address | 55 Bartlemas Road Oxford OX4 1XU |
| | |

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 | Pamela Ruth Sutherland | Treasurer | | The Charity Trustees |
| 2 | Andrew Martin Finney | | | The Charity Trustees |
| 3 | Dione Brigid Avison | | | The Charity Trustees |
| 4 | Isabel Grace Tucker | | | The Charity Trustees |
| 5 | Kathryn Tulip | Secretary | | The Charity Trustees |
| 6 | Jennifer Kirsten Daniella Nicholson | | | The Charity Trustees |
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Corporate trustees – names of the directors at the date the report was approved

| Director name | | |
|----------------------|--|--|
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Name of trustees holding title to property belonging to the charity

| Trustee name | Dates acted if not for whole year | |
|--------------|-----------------------------------|--|
| | | |
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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 |
|-----------------|------|---------|
| | | |
| | | |
| | | |
| | | |

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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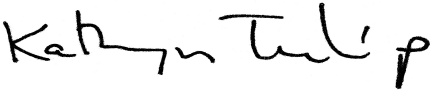
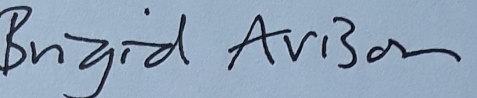
Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

| | | |
|--------------|---|--|
| Signature(s) |  |  |
|--------------|---|--|

| | | |
|--------------|---------------|---------------------|
| Full name(s) | Kathryn Tulip | Dione Brigid Avison |
|--------------|---------------|---------------------|

| | | |
|-------------------------------------|-----------------------|---------|
| Position (eg Secretary, Chair, etc) | Secretary and Trustee | Trustee |
|-------------------------------------|-----------------------|---------|

| | |
|------|----------|
| Date | 15/09/21 |
|------|----------|

Oxford Insight Meditation
Accounts for year ended 31 December 2020

| | 2020 | 2019 |
|---|-----------------------|-----------------------|
| | £ | £ |
| Income: | | |
| Eventbrite | 1826.50 | 2873.26 |
| Cheque/cash | 0.00 | 467.45 |
| | <u>1826.50</u> | <u>3340.71</u> |
| Expenditure: | | |
| Hall hire | -795.00 | -870.00 |
| Teacher's expenses | -295.13 | -891.29 |
| Other expenses | -820.91 | -172.61 |
| Insurance | -170.80 | -162.20 |
| Drop in: | | |
| Hire | -583.20 | -2074.60 |
| Dana | 220.40 | 96.50 |
| | <u>-362.80</u> | <u>-1978.10</u> |
| Donations: | | |
| Boundless Heart Course | | 45.71 |
| Sunday Sangha: | | |
| Costs | -110.00 | -576.74 |
| Dana | 0.00 | 364.90 |
| | <u>-110.00</u> | <u>-211.84</u> |
| Surplus of income over expenditure | <u><u>-728.14</u></u> | <u><u>-899.62</u></u> |
| | | |
| PayPal balance at 31 Dec | 215.25 | 1074.41 |
| Bank Balance at 31 Dec | 3197.79 | 3925.93 |
| Unpresented cheques | | |
| Cash in hand | 148.67 | 149.17 |
| Total Assets and Liabilities | <u><u>3561.71</u></u> | <u><u>5149.51</u></u> |

Approved by the Trustees on 15/08/2021