



CHARITY COMMISSION
FOR ENGLAND AND WALES

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.

		<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	<p>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.</p>

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	<p>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</p>

		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>

		<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
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Financial Review

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

		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		

Name of trustees holding title to property belonging to the charity

[illegible]

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)

Kathryn Tulip	Brigid Avison
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Full name(s)

Kathryn Tulip	Dione Brigid Avison
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Position (eg
Secretary, Chair, etc)

Secretary and Trustee	Trustee
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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	<u>220.40</u>	<u>96.50</u>
	-362.80	-1978.10
Donations:		
Boundless Heart Course		45.71
Sunday Sangha:		
Costs	-110.00	-576.74
Dana	<u>0.00</u>	<u>364.90</u>
	-110.00	-211.84
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	<u>148.67</u>	<u>149.17</u>
Total Assets and Liabilities	<u><u>3561.71</u></u>	<u><u>5149.51</u></u>

Approved by the Trustees on 15/08/2021