



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## **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>

		<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.</p> <p>The main activities undertaken by the charity to carry out its charitable purposes for the public benefit are as follows:</p> <p><b>Teacher-led day retreats</b> – 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.</p> <p><b>Monday sitting group</b> – 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.</p> <p><b>Occasional non-residential courses</b> – 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.</p> <p><b>Website and e-newsletters</b> – Oxford Insight Meditation keeps in touch with supporters and engages with new people through its website, which has details of</p>
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		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	
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Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>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><b>The Monday sitting group</b> 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>
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#### **Additional information (optional)**

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	

Investment performance against objectives	Para 1.41	
Other		

## Financial Review

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

		<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		

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
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## Exemptions from disclosure

#### Reason for non-disclosure of key personnel details

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#### Other optional information

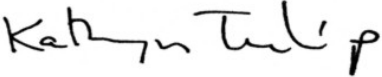
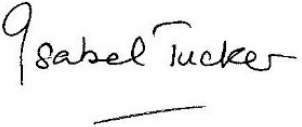
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## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

	
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Full name(s)

Kathryn Tulip	Isabel Grace Tucker
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Position (e.g. Secretary,  
Chair, etc)

Secretary	
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Date

21st October 2024
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**Oxford Insight Meditation**  
**Accounts for year ended 31 December 2023**

	2023		2022
	£		£
<b>Income:</b>			
Eventbrite	3569.03		3470.26
Sumup/cash	352.44		141.32
	<u>3921.47</u>		<u>3611.58</u>
<b>Expenditure:</b>			
Hall hire	-913.00		-698.00
Teacher's expenses	-656.12		-2207.46
Other expenses	-719.19		-662.63
Insurance	-170.80		-170.80
<b>Drop in:</b>			
Hire	-589.51		-224.10
Dana	<u>843.70</u>		<u>186.50</u>
	254.19		-37.60
<b>Donations:</b>			
CAF less fees	43.38		72.11
<b>Sunday Sangha:</b>			
Costs	0.00		0.00
Repayment	<u>8.67</u>		<u>100.00</u>
	8.67		100.00
<b>Surplus of income over expenditure</b>	<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	<u>40.00</u>		<u>48.67</u>
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