

the RHODES PROJECT

2011 Report and Financial Statements

01 January 2011 to 31 December 2011

Registered Charity No. 1136409

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REFERENCE AND ADMINISTRATION DETAILS

Charity Name:	The Rhodes Project
Formed:	13 October 2009
Registered Charity Number:	1136409
Registered:	16 June 2010
Principal Address:	Thames Wharf Studios Rainville Road London W6 9HA
Telephone:	020 3080 3905
Website:	www.rhodesproject.com
Charity Trustees:	Dr Ann Olivarius <i>Chair and General Counsel</i> Ms Kathryn Olivarius <i>Trustee</i> Ms Chase Olivarius-McAllister <i>Trustee</i> Mr Robert Shaine <i>Trustee</i>
Executive Director:	Dr Ann Olivarius
Charity Manager:	Peter Luehring-Jones
General Counsel:	Dr Ann Olivarius McAllister Olivarius Thames Wharf Studios Rainville Road London W6 9HA
Bankers:	NatWest 22 King's Mall Hammersmith London W6 0QD

STRUCTURE, GOVERNANCE AND MANAGEMENT

Description of the Charity's Trusts

Type of governing document:	Declaration of Trust dated 13 October 2009
How the charity is constituted:	Charitable Trust
Trustee selection methods:	Appointed by a resolution of the Trustees at a special meeting under clause 16 of the Declaration of Trust

Organisational Structure

The charity is based in the UK where it occupies leased office space in Hammersmith. Its Trustees guide the charity and oversee the staff that carries out the day-to-day administration of the charity. The Rhodes Project's UK operations are supported by a worldwide network of Rhodes Scholars and interested or affiliated parties, and its research has been assisted by the generous support of the Rhodes Trust as well as various national Rhodes Scholar associations. McAllister Olivarius, a law firm based in London, has provided logistical start-up support and has thus far covered the administrative and operational costs of the charity. McAllister Olivarius has provided seed funding for all the Charity's projects and its employees assist with the charity's work on an "as needed" basis. It is anticipated that this arrangement will continue until the Charity receives such funds and grants as to allow it to finance these charitable aims on a stand-alone basis.

OBJECTIVES AND ACTIVITIES

Objects of the Charity

The Rhodes Project is a non-governmental, non-political, and non-religious organisation that supports research and advocacy work to draw attention to the intersection between gender and success. It was constituted as a charity by trust deed dated 13 October 2009 and registered with the Charity Commission of England and Wales on 16 June 2010. The Trust deed defines the objects of the charity as follows:

- (i) The advancement of the education of the public in general on the subject of women's achievements and/or obstacles thereto and to promote research for the public benefit in all aspects of these subjects and to publish the useful results in such ways as the charity Trustees see fit; and
- (ii) The promotion of gender equality for the public benefit by advancing education and raising awareness of gender issues in such ways as the charity Trustees see fit, including, as they may decide annually by:
 - (a) Awarding to researchers and writers of either gender commissions to undertake research and/or produce publishable articles on topics related to gender equality that complement and/or support the research undertaken within the remit of the object as described above;
 - (b) Awarding to such persons maintenance allowances, salaries, and/or travel allowances as will benefit their research and encourage its distribution and publication to the public at large, either online, in peer-reviewed journals, or through independent publication;
 - (c) Awarding to such persons salaries and/or living expenses so as to allow them to work for the charity and further the charity's aims and public benefits for a defined and discreet period of time; and
 - (d) Supporting and encouraging public discussion and publication of the findings that may result from the research described above with the goal that human society may be changed for the better.

To this definition, the Trustees would like to add that, having observed much of the research done by the Rhodes Project to have wider reach and applicability, they have expanded their focus to include an examination of race where it intersects with gender in all of the work and research that the Charity undertakes. This is a natural, and perhaps even unavoidable, extension of any work that investigates identity politics.

Activities of the Charity

The primary activity of the Rhodes Project is to develop an academically rigorous understanding of successful women through robust research and scholarship in the hope that this work may improve life opportunities for all. The Rhodes Project is currently supporting a study of the lives and life choices of women who have won Rhodes Scholarships, and is in the process of formalising its results in a Findings Report and other publications that will be made accessible to the public. To supplement this research focus, the Rhodes Project will support the writing, public discussion and publication of this and related research the Charity undertakes in the broad area of its remit. The Charity has commissioned and intends to continue supporting complementary projects from students, professional writers and researchers with academic credentials of the highest calibre to enhance the body of work that the Rhodes Project will release to the public. Additionally, the Rhodes Project has sponsored certain individuals as staff researchers and/or writers to further the work of the Charity.

The Charity promotes its work through a network of social media outlets, including a website, www.rhodesproject.com; a Twitter feed, @rhodesproject; a Facebook Page; and a blog, www.therhodesproject.wordpress.com.

THE HISTORY OF THE RHODES PROJECT

The Rhodes Project as a registered charity builds on a research project with the same title and aims that was first created in 2004. The creators of the original research work felt that the Project could support a wider array of research for the social good as a registered charity. However, the work done between 2004 and 2010 has important bearing on the present charitable status of the Rhodes Project and the future of its planned endeavours.

Dr Ann Olivarius, one of the first female Rhodes scholars, began the Rhodes Project in 2004 to investigate the trajectories of her peers, a group of women who, for all of their credentials and achievements, are seemingly invisible in the public sphere. The Project began with an extensive literature review. In June of 2004, the Rhodes Project team designed a survey and sent it to 446 Rhodes women from the classes of 1977 to 1995.

With an excellent response rate of 84%, this survey reached respondents in thirteen countries, giving a window into a diverse female image of success and achievement. The Rhodes Project team analysed this wealth of data in 2004 and found gaps in the information. A second survey, with more personal and detailed questions, was distributed to the initial group of 446 scholars in April of 2005. This second questionnaire was less strict, gave ample space for free response and asked for more details of the scholars' lives. This survey generated 469 pages of data.

In July of 2005, the Rhodes Project team began conducting interviews with Rhodes women around the world. Over 100 interviews were collected and transcribed, reaching women in the United States, Canada, Jamaica, Israel, Italy and Germany.

In 2006 and 2007, the Rhodes Project team continued to analyse its substantial data set while also soliciting articles on its materials and its subjects. Over 25 academic articles on its study have been commissioned to date and are available on the website.

In 2007, the Rhodes Project launched its internet presence, creating a bespoke website to publish its initial findings and articles. The Project began tracking visitors to the website in late 2010. Since that date, thousands of visitors from around the globe have visited the site and absorbed the findings of the Project.

In 2009, the Rhodes Project continued to develop its web presence, creating a popular Wordpress blog to promote its findings, to offer commentary on events in the news and in the world, and to create a community in which Rhodes women and others interested in a diverse picture of success could come together to discuss their thoughts.

Throughout this time, the research that was done attracted interest from all quarters – from major universities who wanted the Rhodes Project's material for academic use, from businesses who wanted to diversify their leadership, and from hard-working women and men who wondered whether a different work-life balance might be possible.

At the end of 2009, while still developing the Findings Report which will bring together this research and data into a portrait of the Rhodes woman as a blueprint for a new kind of success, the Project decided that the diversity of its subject matter merited wider consideration. From 2004 to 2009, the Project was an in-house project of McAllister Olivarius, an international law firm headquartered in London. While McAllister Olivarius' generous support was and continues to be invaluable, as the scope of the Project increased, a totally interdependent relationship was no longer appropriate for the firm or for the Rhodes Project.

The Rhodes Project decided to become an independent Charity so that: 1) its own research could do the most good for society; 2) it could broaden its mission and support the work of others towards the same ends; and 3) it could gain some financial independence from McAllister Olivarius and create a funding strategy which will generate greater financial support from a broader swath of donors. For all of these reasons, on 13 October 2009, the Rhodes Project became a Trust and on 16 June 2010, the Rhodes Project registered as a charity with the Charity Commission.

The Charity is well aware that it owes a great debt of gratitude to McAllister Olivarius for providing it with the means to come into existence, and for its continued support.

2011 ACHIEVEMENTS AND PERFORMANCE

Maintaining Status as a Charity of England and Wales

On 16 June 2010, the Rhodes Project became a registered charity in England and Wales. The Project has continued to be solely supported by McAllister Olivarius and the Trustees; accordingly the bulk of its funds are in reserve for anticipated publishing costs and fellowship support.

Specific Projects

In 2011, in addition to on-going article production for its site, the Rhodes Project focused on three main research projects.

1) The Oral History Book Project

Following a profitable discussion with literary agent Kathleen Anderson, the Rhodes Project determined that it would be appropriate to release the Rhodes Project's findings as a series of publications. The first of these will be a book based largely on the interview materials that we have collected and will be supplemented with statistics, anecdotes, and other primary materials.

The Rhodes Project team completed filing interviews with an eye towards this kind of product in 2011, paving the way for the successful completion of a draft and publication in 2012.

2) The Four Rhodes Project

The Four Rhodes Project seeks to examine the first generation of Rhodes women in the context of changing educational policies and the rising women's movement around the world. In-depth interviews with four scholars from diverse racial, ethnic, and cultural backgrounds in the United States and Canada bring the narrative of Second Wave feminism to life. In 2011, the Charity continued to collect primary source material for this piece, created a database of secondary materials, and developed a clear critical direction that has shaped its writing and research in 2012.

3) The Lucy Banda Sichone Project

Lucy Banda Sichone, Zambia's first female Rhodes Scholar, puts a different face on the image of female success. She is not from an industrialised country or from a wealthy background and yet she became one of Zambia's leading lawyers and social activists during her life, which was tragically cut short by a terminal illness. She was, in fact, the first female Rhodes Scholar to die of AIDS. In 2011, six researchers spent an intensive week developing critical essays on Sichone for publication in a celebratory collection.

Social Media

In 2011, the Charity published an article on the *Huffington Post*, 62 blog posts, and hundreds of tweets.

The blog received a record total of 8,727 visitors, more than twice the number of visitors in 2010. The website was visited 2,025 times by people in 70 different countries. The Charity is pleased to be able to say that its internet presence has given its work truly global reach. Although these are both record highs for the Project, the Charity expects 2012 to show even greater numbers.

2011 FINANCIAL REVIEW

The Trustees present their report along with a financial statement of the charity for 1 January 2011 to 31 December 2011. The financial statements comply with the Charity's constitution and are prepared using the "receipts and payments" format in accordance with Charity Commission Publication CC16b: Completion Notes for Receipts and Payments Accounts.

Principal Sources of Funds

The Rhodes Project has thus far received cash donations from the Trustees. Going forward, the Project expects to receive online donations from its various media outlets and will explore other fundraising options as needed. The Project also expects to receive future contributions from several legal settlements related to cases of sex and race discrimination.

In-Kind Donations

Because the work of the Project is at this stage largely based on research and publication, the charity relies heavily upon in-kind support from Trustees to enable Project staff to have access to the resources needed to produce their reports.

Please see the note on "In-Kind Donations" at the base of page 9 for a full explanation of the in-kind support donated by the Trustees.

Reserves Policy

The process of publishing and sponsoring fellows for the Project means that the Charity's levels of reserves will fluctuate throughout the year. The reserves will build until such time as research from the Project requires publication or a fellow requires a stipend, and that published work will in turn generate funds in the form of increased donor interest or proceeds from sales of the work-product, so the Charity's reserves are in essence cyclical.

	Note	2011	2010	Total
Receipts				
General Donations:	1	£0	£5,000	£5,000
Trustee support:	2	(see note below)	£0	£0
Total Receipts		£0	£5,000	£5,000
Payments				
Operating Expenses:	3	£1,836	£0	£1,836
General		£0	£0	£0
Transfer fees		£0	£0	£0
Total Payments		£1,836	£0	£1,836
<u>Net of Receipts</u>		-£1,836	£5,000	£3,164
Statement of Assets and Liabilities at 31 Dec 2011				
Cash Funds				
Funds for the Rhodes Project's support	4	£3,164		
Assets retained for the charity's own use			In-kind donation	
Office space at Thames Wharf Studios				
Total		£3,164		

Note on In-Kind Donations

Administrative expenses, including general expenses, transportation costs, office space, furniture, phone, utilities, rent, staff time and legal fees in 2011 were donated by McAllister Olivarius, a law firm located in Hammersmith, London. The Trustees are grateful for McAllister Olivarius' assistance and have thanked the firm by listing McAllister Olivarius as a major supporter on the Rhodes Project website. In accordance with the Charity Commission's published guidance on reporting in-kind donations for charities that employ the "receipts and payments" accounting method, the Trustees are not required to assign a value to these donations. See Charity Commission Publication CC16b: Completion Notes for Receipts and Payments Accounts.

NOTES TO ACCOUNTS

- 1. General Donations:** General donations are unrestricted income from donors who specify they wish their donation to support the administration of the charity.
- 2. Trustee support:** Trustee support is unrestricted funds, advice and guidance given to the Rhodes Project to support the administration of the Charity.
- 3. Operating Expenses:** Funds from Trustee support and donations specified for charity administration are used to support the operation of the Rhodes Project. However, all of the operating expenses in 2011 – staff salaries, stationary supplies, phones, post office space, utilities, transportation – were in-kind donations made by the Trustees.
- 4. Funds for the Rhodes Project support:** Designates all unrestricted funds remaining for the administration of the Rhodes Project.

FUTURE ACTIVITIES

In 2012, the Trustees hope to complete a draft of the formal Rhodes Project Oral History Book and ready that draft for publication; in addition, they hope to further develop the charitable work of the Rhodes Project through collaborative work.

The Rhodes Project team plans to continue to work on the three main projects detailed above: other publications for the Findings materials; the Four Rhodes Project; and the Lucy Banda Sichone Project. It is estimated that the latter two projects will be in late draft stages by the Spring of 2012 with the help of research assistants and dedicated writers. The Findings Report is on track to be completed in 2012.

As mentioned above, the Charity also hopes to develop its fundraising and grant application methods, providing for the ability to grow beyond the support currently provided by McAllister Olivarius.

Throughout, the Trustees plan to continue expanding the impact of the Charity's social media presence, increasing blog output and using online media more strategically to prime its audience for the release of its publications in order to gain maximum impact.

ACKNOWLEDGEMENTS

The Trustees are grateful to our donors over the past year. We also wish to acknowledge the dedication and hard work of our staff and research assistants in administering the charity and producing valuable scholarship. We are heartened by the community support and enthusiasm we have received for our work, especially from the Rhodes Scholar community, including Don Markwell, the former Warden of the Rhodes Trust (and an enormous supporter of our project) and those women we have been fortunate enough to work with through our research.

We would also like to extend special thanks to the following individuals:

- All of the Rhodes women who have opened their lives to our study, in particular **Nadine Baudot-Trajtenberg, Annie Haight, and Banuta Rubess;**
- **Dr Jef McAllister**, our invaluable editor;
- **Michael Singleton**, the Rhodes Project Intern during summer 2011, who breathed new life into the Rhodes Project's social media empire; and
- Project Manager **Alice Buttrick**, who has led us with passion and grace into formal charity-hood and whose personal commitment to excellence is seen in every page of our website and in all of the work that we do; and
- **Lindsay Willemain**, for providing a focus and an impetus for our work.

DECLARATION

The Trustees declare that they have approved the Trustees' report and financial statements.

Dr Ann Olivarius
Trustee, Chair and General Counsel

Date

Kathryn Olivarius
Trustee

Date

Chase Olivarius McAllister
Trustee

Date

Robert Shaine
Trustee

Date