

EDUCATION OTHERWISE ASSOCIATION

England & Wales · Charity number 1055120

Details

Other names	EDUCATION OTHERWISE ASSOCIATED LIMITED, EDUCATION OTHERWISE ASSOCIATION LIMITED, EDUCATION OTHERWISE E O
Status	Registered
Legal form	CIO
Registered	1996-05-02
Register	View on the Charity Commission register

Contact

Address	Education Otherwise Association 61 Bridge Street Kington Herefordshire HR5 3DJ
Phone	0300 1245690
Email	enquiries@educationotherwise.org
Website	http://www.educationotherwise.org

Activities

Objects: TO PROMOTE, MAINTAIN, IMPROVE, AND ADVANCE PUBLIC EDUCATION, PARTICULARLY BY THE PROVISION OF INFORMATION, SUPPORT AND FACILITIES TO ENABLE PARENTS TO MAKE EDUCATIONAL PROVISION FOR THEIR CHILDREN OTHERWISE THAN THROUGH FULL-TIME STATE OR PRIVATE EDUCATIONAL INSTITUTION.

Activities: Education Otherwise is a membership organisation that provides support and information for families whose children are being educated outside school and for those who wish to uphold the freedom of families to take proper responsibility for the education of their children.

Classification

- **How:** Provides Human Resources, Provides Services, Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body
- **What:** Education/training
- **Who:** Children/young People, People With Disabilities, Other Charities Or Voluntary Bodies, The General Public/mankind

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-06-30	£26,877	£32,354	-	-
2024-06-30	£25,468	£23,621	-	-
2023-06-30	£22,148	£10,742	-	-
2022-06-30	£14,977	£8,658	-	-
2021-06-30	£10,495	£5,961	-	-

Trustees

Name	Role	Appointed
Rebecca Silverwood	Chair	2021-08-11
Alanna Cohen		2025-07-04
Amanda King		2025-05-26
FE MUKWAMBA-SENDALL		2012-12-01
Hana Strainge		2025-05-18
Katherine Norman		2026-01-17
Lisa McKittrick		2025-05-24
Roberta Littlewood		2025-05-18
Sophie Pryce Looijer		2025-05-25
Tasharna Gardner		2025-05-18
Victoria Nunn		2026-01-17

Accounts



Education Otherwise Association
61 Bridge Street
Kington HR5 3DJ
Helpline: 0300 1245690
w: Educationotherwise.org
e: enquiries@educationotherwise.org

Trustees' Annual Report for the period ending 30th June 2025

Education Otherwise Association charity registration number: 1055120

Objectives

To promote, maintain, improve, and advance public education, particularly by the provision of information, support and facilities to enable parents to make educational provision for their children otherwise than through full time state or private educational institutions.

Activities

Education Otherwise is a membership organisation for the public and social benefit, which provides support and information for families whose children are being educated outside of school and for those who wish to uphold the freedom of families to choose the best form of education for their children.

Our principal aims are:

- To encourage, promote and support learning outside of the school system.
- To reaffirm that parents have the primary responsibility for their children's education and that they have the right to exercise this responsibility by educating them out of school.
- To establish the primary right of children to have full consideration given to their wishes and feelings about their education.
- To promote knowledge, understanding and acceptance of education otherwise than at school in the world at large.

These aims are met via our publicly accessible website as well as through the public helpline and our social media group. Support and information are provided to members, home educators, the media, local and national government and other interested parties, including voluntary agencies. In addition, members can take advantage of our free report checking services, discounts, email and internet support. Local authorities and other public bodies can take advantage of our professional development offer.

Accepted Local Home Education Groups organised by Education Otherwise members may take advantage of reduced premiums for Public Liability Insurance through our Policy.

Education Otherwise is entirely run and managed by volunteers and the main activities undertaken by the charity are in furtherance of the public benefit. In organising these activities, trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The charity continues to make a difference through the support given by our volunteers.

Telephone helpline: Our telephone helpline is serviced by professionally trained volunteers and receives a significant number of calls. Callers are reassured and supported by the information which they receive. During 2024 to 2025 the number of calls answered was high, averaging 300 per month in the early months, reducing to approximately 200 as the year went on. The line was not advertised significantly in the latter part of this year whilst the charity recruited and trained new helpline volunteers. This year, we continue to see significant numbers of callers who feel forced to home educate so as a result of their child's mental health and special needs not being met in school.

Website: Our website traffic has continued to be at high levels throughout the year.

Advice and information: Our fact sheets and information continue to be referred to and to meet the needs of home educating families and other stakeholders. Local authorities continue to refer parents to our services with clear statements being made by some that Education Otherwise information is respected and valued.

Consultations and stakeholder involvement

We continue to be asked to give media interviews and to contribute to consultations.

We have met with a number of public bodies and agencies in order to raise concerns on behalf of our members and service users.

We have continued to liaise with public bodies and organisations in order to further the needs of our members and service users.

We sit on the small panel of stakeholders working with the DfE in order to provide a direct means of raising concerns held by service users.

We sit on the DfE panel for the Children's Wellbeing and Schools Bill.

We liaise with Parliamentarians in order to provide information and to raise concerns in respect of prospective legislation and regulation on behalf of our service users.

Initiatives

Education Otherwise: Fifty Years of Home Education. The charity was delighted to publish our book relating the history of home education in the United Kingdom, a history in which we play a major part. This was extremely well received, including by Parliamentarians and local authorities who received copies. Nearly 500 copies were issued to excellent reviews.

The Kit Award for excellence continues to be well received. The award seeks to encourage excellence in local authority home education practice. Nominations are made by home educating families and awards are based on those nominations. Awards were made to 115 officers in 75 local authorities for the award session 1st September 2024.

Report checking: Our professional report checking service for members has proven popular amongst members who are reassured by the service being insured, subject to Data Protection regulations and producing a very high level of report acceptance. Non members can also access the service. Our checkers have met our target turnaround in almost all cases and received consistent, positive feedback from service users.

Youth panel: The youth panel has decided to recruit members for the 2025 to 2026 season in order to extend its activities. Alice, who manages the panel, has continued to be a real asset to the charity and an excellent standard bearer for home educated young people.

Local Authority Continuous Professional Development (training)

After two years, our CPD for local authority staff continues to be extremely well received. The CPD comes from a position of positive practice and is informed by feedback from members and service users, together with our research into positive practice in highly regarded local authority areas.

During this year, we organised and funded extremely helpful CPD presented by David Wolfe KC, in respect of home educated special needs children, EHCPs and local authority practice in this area. David kindly allowed us to share the provided information to those local authority officers who could not attend on the day, extending the reach of this valuable awareness raising session.

Policies Held

- a. internal charity financial controls policy and procedures
- b. safeguarding policy and procedures
- c. financial reserves policy and procedures
- d. complaint's policy and procedures
- e. serious incident reporting policy and procedures
- f. internal risk management policy and procedures
- g. trustee expenses policy and procedures
- h. trustee conflicts of interest policy and procedures
- k. bullying and harassment policy and procedures
- l. social media policy and procedures

Serious incident reporting

One event was reported during the year. The event had the following estimated positive effect:

- Increased number of volunteers
- Increased number of trustees
- Long term capacity to deliver services

The event had the following estimated negative effect:

- A deposit on an event of approximately £360 was lost
- Necessary expenditure on legal advice
- There was an immediate adverse effect on the number of trustees which lasted for a few weeks.

Financial Review

Income

Income from all sources is up in 2024 - 2025 at £26,876.59 compared to 2023 - 2024 at £25,468

This is primarily through membership income with membership continuing to grow.

Expenditure

Ordinary operating expenditure this year is £32,354.10 a rise from £23,621 last year which reflects our greater level of service provision and commitment to professionalism. This was in part made up of training costs for volunteers and legal fees in order to ensure that our services remain accurate. Part of the expenditure was on deposits to secure services to provide for our fiftieth anniversary celebration in 2026.

Balances

Overall, the charity had a deficit of £3,478 during the financial year. This mainly reflects deposits paid to secure services for our fiftieth anniversary event.

Overall, funds held amount to £54,468 which is approximately two years of normal operating expenditure.

Principal sources of funds

The principal source of funds remains the sale of memberships, together with donations from members and the public. The charity also charges a fee for local groups to be included under the cover of its insurance policy and a portion of the annual insurance fee is covered by this income. This year, £1,964 was received through charitable sales.

Principal Risks

Possible future decline in income from memberships is a concern which has arisen in previous years, but buoyant membership uptake shows promise for future years. Trustees remain vigilant to the possibility of the effects of increasing inflation and membership numbers falling in the future.

Reserves

The charity currently holds reserves amounting to approximately two years of normal expenditure. Trustees maintain awareness of the need to comply with Charity regulations by using funds toward service provision and not holding an excess in reserve.

Going concern

The charity's financial position remains secure with no uncertainty about remaining a going concern.

Structure, Governance and Management

Constitution

Education Otherwise Association is a Charitable Incorporated Organisation and is not linked with any other organisation.

Membership

Membership is by annual subscription and is open to individuals and organisations involved with, or having an interest, in home education. Voting rights have been opened to all members upon application in order to increase our democratic approach to governance.

Recruitment and Appointment of Trustees

Trustees are recruited from members who have requisite skills and abilities to support the charity today and into the future. All trustees must be registered members of the charity at the time of appointment. Potential trustees are proposed to the AGM. Trustees are appointed for a term of four years, although they may be co-opted between AGMs. Co-opted trustees must stand down, or stand for election, at the following AGM. A permanent trusteeship can be awarded to one long standing and experienced trustee. This post is currently held by Dr Fe Mukwamba-Sendall as charity President.

There is an interview procedure in place to ensure that potential trustees meet eligibility criteria before being proposed for election or co-opted.

Trustee Induction and Training

New trustees are provided with information about their role and responsibilities as Trustees via an online course, the Trustee handbook, trustee forum and remote meetings. In addition, all trustees receive training in safeguarding and the charity services.

Trustee Associate Role

Trustee associates support trustees in their respective roles and responsibilities. The position of Trustee associates underpins the charity's succession plans.

Volunteers

Approximately 25 volunteers provided services to support our aims during this year.

Reference and Administration

Trustees for the period 1st July 2024 to 30th June 2025

Continuing in post throughout the period

- F. Mukwamba-Sendall (appointed 1st December 2012)
- W. Charles-Warner (Co-opted September 2019. Confirmed 12th October 2019 and 2022)
- Rebecca Silverwood (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)

Joined during this period

- Tasharna Gardner Co-opted 18th May 2025
- Catherine Sunshine Co-opted 18th May 2025
- Roberta Littlewood Co-opted 18th May 2025
- Hana Bishop Co-opted 18th May 2025
- Lisa McKittrick Co-opted 18th May 2025
- Amanda King Co-opted 18th May 2025
- Alanna Cohen Co-opted 18th May 2025
- Sophie Pryce Looijer Co-opted 18th May 2025

Resignations and ceased in post during this period

- Ambroz Neil (Co-opted September 2019. Confirmed 12th October 2019, did not sit for re-election in 2022 when tenure ended, ceased in post 23rd March 2025)
- Gary Campbell (Co-opted 10th June 2023, confirmed at AGM 30th September 2023, Resigned 24th March 2025).

- Katie Cousins (Co-opted 7th March 2023, confirmed at AGM 30th September 2023, Resigned 1st November 2024)
- Merlyn Wright (Co-opted 29th July 2022, confirmed at AGM October 2022, Resigned 24th March 2025)
- Katie Cox (Was Baines) (Co-opted 24th February 2024 Confirmed at AGM 29th September 2024. resigned 24th October 2024.
- Kate Mandrill (Co-opted 26th May 2024) Resigned 24th March 2025
- Lucca Campbell (Co-opted 26th May 2024) Resigned 24th March 2025
- Victoria Nunn elected at AGM 29th September 2024, resigned 16th February 2025.

Trustees' responsibilities for the preparation of the financial statements

The trustees are responsible for preparing the trustees report and financial statements in accordance with applicable law and United Kingdom accounting standards.

In preparing those statements, the trustees are required to:

- Select suitable accounting policies and apply them consistently.
- Observe the methods and principles in the Charities SORP.
- Make judgements and estimates that are reasonable and prudent.
- State whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements.

The accounts have been prepared in accordance with the provisions of the Charities SORP.

Declarations

The trustees declare that they have approved the trustees report above
Fe Mukwamba-Sendall, Wendy Charles-Warner, Rebecca Silverwood, Tasharna Gardner, Catherine Sunshine, Roberta Littlewood, Hana Bishop, Lisa McKittrick, Amanda King, Alanna Cohen and Sophie Pryce Looijer Co-opted 18th May 2025

29th August 2025

Financial report

Education Otherwise Association Statement of Financial Activities for the year ending 30th June 2024

Education Otherwise
Association
Statement of Financial

Activities
For the year ending 30 June
2025

	2025	2024
	£	£
Income & Endowments		
	23,8	24,41
Membership & donations	70	8
	1,0	1,05
Investment Income	43	0
	1,9	
Charitable Sales	64	-
	26,8	25,46
Total Income	77	8
Expenditure		
	20,6	17,90
Charitable activities	92	3
	11,6	5,71
Other expenses	62	8
	32,3	23,62
Total Expenditure	54	1
Net movement in funds	(5,478)	4819
Reconciliation of funds		
	59,0	57,17
Total funds b/f	57	4
	(4,5	4,81
Net movement in the year	89)	9
		61992.7
Total funds c/f	54,468	7

Accounts

Trustees' Annual Report for the period ending 30th June 2024

Education Otherwise Association charity registration number: 1055120

Objectives

To promote, maintain, improve, and advance public education, particularly by the provision of information, support and facilities to enable parents to make educational provision for their children otherwise than through full time state or private educational institutions.

Activities

Education Otherwise is a membership organisation for the public and social benefit, which provides support and information for families whose children are being educated outside of school and for those who wish to uphold the freedom of families to choose the best form of education for their children.

Our principal aims are:

- To encourage, promote and support learning outside of the school system.
- To reaffirm that parents have the primary responsibility for their children's education and that they have the right to exercise this responsibility by educating them out of school.
- To establish the primary right of children to have full consideration given to their wishes and feelings about their education.
- To promote knowledge, understanding and acceptance of education otherwise than at school in the world at large.

These aims are met via our publicly accessible website as well as through the public helpline and our social media group. Support and information are provided to members, home educators, the media, local and national government and other interested parties including voluntary agencies. In addition, members can take advantage of our free report checking services, discounts, email and internet support. Local authorities and other public bodies can take advantage of our professional development offer.

Local Home Education Groups organised by Education Otherwise members may take advantage of reduced premiums for Public Liability Insurance through our Policy.

Education Otherwise is entirely run and managed by volunteers and the main activities undertaken by the charity are in furtherance of the public benefit. In organising these activities, trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The charity continues to make a difference through the support given by our volunteers.

Telephone helpline: Our telephone helpline is serviced by professionally trained volunteers and receives a significant number of calls. Callers are reassured and supported by the information which they receive. During 2023 to 2024 the number of calls answered was high, averaging 300 per month. This year, the primary reason for

calling has changed with significant numbers of callers expressing reluctance to home educate but feeling forced to do so as a result of their child's mental health and special needs not being met.

Website: Our website traffic has continued to be at high levels throughout the year.

Advice and information: Our fact sheets and information continue to be referred to and to meet the needs of home educating families and other stakeholders. Increasingly, local authorities are referring parents to our services in greater numbers with clear statements being made by some that Education Otherwise information is respected and valued.

Consultations and stakeholder involvement

We continue to be asked to give media interviews and to contribute to consultations.

We have met with a number of other public bodies and agencies in order to raise concerns on behalf of our members and service users.

We have continued to widen our contact base with public bodies and organisations in order to further the needs of our members and service users.

We sit on the small panel of stakeholders working with the DfE in order to provide a direct means of raising concerns held by service users.

We successfully challenged the new Welsh guidance backed by high quality legal advice resulting in a significant amendment to that guidance.

Initiatives

The Kit award for excellence continues to be well received. The award seeks to encourage excellence in local authority home education practice. Nominations are made by home educating families and awards are based on those nominations. Awards were made on to 57 local authorities for the award session 1st September 2023. Nominations were down as a result of concerns over proposed regulation and government Bills aimed at introducing a statutory register.

Report checking: Our professional report checking service for members has proven popular amongst members who are reassured by the service being insured, subject to Data Protection regulations and producing a very high level of report acceptance. Non members can also access the service. Our checkers have met our target turnaround in over 97% of cases and received consistent, positive feedback from service users.

Youth panel: The youth panel has met with peers to garner support for examination initiatives and demonstrated incredible competence in supporting our young people's needs.

Local Authority Continuous Professional Development (training)

In January 2023 we introduced CPD for local authority staff which has been extremely well received. The CPD comes from a position of positive practice and is informed by feedback from members and service users, together with our research into positive practice in highly regarded local authority areas. By the end of the 2024 financial year, we had provided CPD to approximately 130 local authorities, together with other public bodies.

Financial Review

Income

Income from all sources is up in 2024 at £25,468 compared to £22,148 (total) in 2022 to 2023.

This is primarily through membership income with membership continuing to grow.

Expenditure

Ordinary operating expenditure this year is £23,621 a rise from £10,742 last year which reflects our greater level of service provision and commitment to professionalism. This was in part made up of training costs for volunteers and legal fees to not only ensure that our services remain accurate, but also to confirm questions raised in respect of state benefits and special needs provision.

Balances

Overall, the charity had a surplus of £4,819 during the financial year, a reduction from the previous financial year. Overall, funds held amount to £61,993 which is approximately three years of normal operating expenditure.

Principal sources of funds

The principal source of funds remains the sale of memberships, together with donations from members and the public. The charity also charges a fee for local groups to be included under the cover of its insurance policy and a portion of the annual insurance fee is covered by this income.

Principal Risks

Possible future decline in income from memberships is a concern which has arisen in previous years, but buoyant membership uptake shows promise for future years. Trustees remain vigilant to the possibility of the effects of increasing inflation and membership numbers falling in the future.

Reserves

The charity currently holds reserves amounting to approximately three years' expenditure. The trustees consider this to be more than adequate. Trustees maintain awareness of the need to comply with Charity regulations by using funds toward service provision and not holding an excess in reserve.

Going concern

The charity's financial position remains secure with no uncertainty about remaining a going concern.

Structure, Governance and Management

Constitution

Education Otherwise Association is a Charitable Incorporated Organisation and is not linked with any other organisation.

Membership

Membership is by annual subscription and is open to individuals and organisations involved with, or having an interest, in home education. Voting rights have been opened to all members upon application in order to increase our democratic approach to governance.

Recruitment and Appointment of Trustees

Trustees are recruited from members who have requisite skills and abilities to support the charity today and into the future. All trustees must be registered members of the charity at the time of appointment. Potential trustees are proposed to the AGM. Trustees are appointed for a term of four years, although they may be co-opted between AGMs. Co-opted trustees must stand down, or stand for election, at the following AGM. A permanent trusteeship can be awarded to one long standing

and experienced trustee. This post is currently held by Dr Fe Mukwamba-Sendall as charity President.

There is a stringent interview procedure in place to ensure that potential trustees meet eligibility criteria before being proposed for election or co-opted.

Trustee Induction and Training

New trustees are provided with information about their role and responsibilities as Trustees via the Trustee handbook, trustee forum and remote meetings.

Trustee Associate Role

Trustee associates support trustees in their respective roles and responsibilities. The position of Trustee associates underpins the charity's succession plans.

Reference and Administration

Trustees for the period 1st July 2023 to 30th June 2024

Joined during the period

- Katie Cox (Was Baines) (Co-opted 24th February 2024)
- Kate Mandrill (Co-opted 26th May 2024)
- Lucca Campbell (Co-opted 26th May 2024)

Continuing in post throughout the period

- F. Mukwamba-Sendall (appointed 1st December 2012)
- W. Charles-Warner (Co-opted September 2019. Confirmed 12th October 2019)
- A. Neil (Co-opted September 2019. Confirmed 12th October 2019)
- Helena Wilson (Co-opted 15th October 2020, confirmed at AGM 16th October 2020)
- Merlyn Wright (Co-opted 29th July 2022)
- Rebecca Silverwood (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)
- Gary Campbell (Co-opted 10th June 2023, confirmed at AGM 30th September 2023)
- Katie Cousins (Co-opted 7th March 2023, confirmed at AGM 30th September 2023).

Resignations during this period

- Catherine (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021, resigned 30th September 2023)
- John Yates (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021, resigned 20th March 2024)

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- Make judgements and estimates that are reasonable and prudent.
- State whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements.

The accounts have been prepared in accordance with the provisions of the Charities SORP.

Declarations

The trustees declare that they have approved the trustees report above

Fe Mukwamba-Sendall, Wendy Charles-Warner, Dr Ambroz Neil, Helena Wilson, Merlyn Wright, Gary Campbell, Katie Cousins, Rebecca Silverwood, Katie Cox, Lucca Campbell and Katie Mandrill.

31st August 2024

Financial report

Education Otherwise Association Statement of Financial Activities for the year ending 30th June 2024

	2024 in £	2023 in £
Income and Endowments		
Membership and donations	24,418	18,834
Investment income	1,050	314
Other income	0	3,000
Total income	25,468	22,148
Expenditure		
Charitable activities	17,903	8,584
Other	5,718	2,158
Total Expenditure	23,621	10,742
Net Movement in Funds	1,847	11,406
Reconciliation of funds		
Total funds brought forward	57,174	45,768
Net movement in the year	4,819	11,406
Total funds carried forward	61,993	57,174

Expenditure

Expenditure on raising funds	0
Other expenditure	5,718
Expenditure on charitable activities	17,903
Total expenditure value in grants to institutions	0
Governance costs	0
Other recognised gains and losses	0
Assets	
Total fixed assets	0

Total current assets (cash in bank)	61,993
Liabilities	0
Total net assets	61,993
Unrestricted funds	61,993



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calling has changed with significant numbers of callers expressing reluctance to home educate but feeling forced to do so as a result of their child's mental health and special needs not being met.

Website: Our website traffic has continued to be at high levels throughout the year.

Advice and information: Our fact sheets and information continue to be referred to and to meet the needs of home educating families and other stakeholders.

Increasingly, local authorities are referring parents to our services in greater numbers with clear statements being made by some that Education Otherwise information is respected and valued.

Consultations and stakeholder involvement

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We have met with a number of other public bodies and agencies in order to raise concerns on behalf of our members and service users.

We have continued to widen our contact base with public bodies and organisations in order to further the needs of our members and service users.

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We successfully challenged the new Welsh guidance backed by high quality legal advice resulting in a significant amendment to that guidance.

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Youth panel: The youth panel has met with peers to garner support for examination initiatives and demonstrated incredible competence in supporting our young people's needs.

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Financial Review

Income

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This is primarily through membership income with membership continuing to grow.

Expenditure

Ordinary operating expenditure this year is £23,621 a rise from £10,742 last year which reflects our greater level of service provision and commitment to professionalism. This was in part made up of training costs for volunteers and legal fees to not only ensure that our services remain accurate, but also to confirm questions raised in respect of state benefits and special needs provision.

Balances

Overall, the charity had a surplus of £4,819 during the financial year, a reduction from the previous financial year. Overall, funds held amount to £61,993 which is approximately three years of normal operating expenditure.

Principal sources of funds

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Principal Risks

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Reserves

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Going concern

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Structure, Governance and Management

Constitution

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Membership is by annual subscription and is open to individuals and organisations involved with, or having an interest, in home education. Voting rights have been opened to all members upon application in order to increase our democratic approach to governance.

Recruitment and Appointment of Trustees

Trustees are recruited from members who have requisite skills and abilities to support the charity today and into the future. All trustees must be registered members of the charity at the time of appointment. Potential trustees are proposed to the AGM. Trustees are appointed for a term of four years, although they may be co-opted between AGMs. Co-opted trustees must stand down, or stand for election, at the following AGM. A permanent trusteeship can be awarded to one long standing

and experienced trustee. This post is currently held by Dr Fe Mukwamba-Sendall as charity President.

There is a stringent interview procedure in place to ensure that potential trustees meet eligibility criteria before being proposed for election or co-opted.

Trustee Induction and Training

New trustees are provided with information about their role and responsibilities as Trustees via the Trustee handbook, trustee forum and remote meetings.

Trustee Associate Role

Trustee associates support trustees in their respective roles and responsibilities. The position of Trustee associates underpins the charity's succession plans.

Reference and Administration

Trustees for the period 1st July 2023 to 30th June 2024

Joined during the period

- Katie Cox (Was Baines) (Co-opted 24th February 2024)
- Kate Mandrill (Co-opted 26th May 2024)
- Lucca Campbell (Co-opted 26th May 2024)

Continuing in post throughout the period

- F. Mukwamba-Sendall (appointed 1st December 2012)
- W. Charles-Warner (Co-opted September 2019. Confirmed 12th October 2019)
- A. Neil (Co-opted September 2019. Confirmed 12th October 2019)
- Helena Wilson (Co-opted 15th October 2020, confirmed at AGM 16th October 2020)
- Merlyn Wright (Co-opted 29th July 2022)
- Rebecca Silverwood (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)
- Gary Campbell (Co-opted 10th June 2023, confirmed at AGM 30th September 2023)
- Katie Cousins (Co-opted 7th March 2023, confirmed at AGM 30th September 2023).

Resignations during this period

- Catherine (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021, resigned 30th September 2023)
- John Yates (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021, resigned 20th March 2024)

Trustees' responsibilities for the preparation of the financial statements

The trustees are responsible for preparing the trustees report and financial statements in accordance with applicable law and United Kingdom accounting standards.

In preparing those statements, the trustees are required to:

- Select suitable accounting policies and apply them consistently.
- Observe the methods and principles in the Charities SORP.
- Make judgements and estimates that are reasonable and prudent.
- State whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements.

The accounts have been prepared in accordance with the provisions of the Charities SORP.

Declarations

The trustees declare that they have approved the trustees report above

Fe Mukwamba-Sendall, Wendy Charles-Warner, Dr Ambroz Neil, Helena Wilson, Merlyn Wright, Gary Campbell, Katie Cousins, Rebecca Silverwood, Katie Cox, Lucca Campbell and Katie Mandrill.

31st August 2024

Financial report

Education Otherwise Association Statement of Financial Activities for the year ending 30th June 2024

	2024 in £	2023 in £
Income and Endowments		
Membership and donations	24,418	18,834
Investment income	1,050	314
Other income	0	3,000
Total income	25,468	22,148
Expenditure		
Charitable activities	17,903	8,584
Other	5,718	2,158
Total Expenditure	23,621	10,742
Net Movement in Funds	1,847	11,406
Reconciliation of funds		
Total funds brought forward	57,174	45,768
Net movement in the year	4,819	11,406
Total funds carried forward	61,993	57,174

Expenditure

Expenditure on raising funds	0
Other expenditure	5,718
Expenditure on charitable activities	17,903
Total expenditure value in grants to institutions	0
Governance costs	0
Other recognised gains and losses	0
Assets	
Total fixed assets	0

Total current assets (cash in bank)	61,993
Liabilities	0
Total net assets	61,993
Unrestricted funds	61,993



Section A

Independent Examiner's Report

Report to the trustees/
members of

EDUCATION OTHERWISE ASSOCIATION

On accounts for the year
ended

30/06/2024

Charity no
(if any)

1055120

Set out on pages

1,2

Responsibilities and basis
of report

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30/06/2024.

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's
statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed:

Date: 200725

Name:

COLIN PITMAN

Relevant professional
qualification(s) or body (if
any):

Address:

74 BEECHFIELD WALK
NORTHAM ABBEY
ESSEX
EN93AA

Section B

Disclosure

Only complete if the examiner needs to highlight matters of concern (see CC32. Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of
any items that the
examiner wishes to
raise



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's
report on the accounts

Section A		Independent Examiner's Report	
Report to the trustees members of		EDUCATION OTHERWISE ASSOCIATION	
On accounts for the year ended	30/06/2018	Charity no (if any)	1055130
Set out on pages	12		
Responsibilities and basis of report		I report in respect of my examination of the accounts of the charity (the Trust) for the year ended 30/06/2018. As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 (the Act). I have followed the applicable Directions given by the Charity Commission under section 14(2)(b) of the Act.	

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in any material respect:		the accounts do not accord with the accounting records	
I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.		the accounts do not accord with the accounting records	
Signed:		Date:	
Name:		Position:	
Religious, professional or other status (if any):		Address:	
E-mail:		Telephone:	
Fax:		Mobile:	
I hereby certify that the examination of the accounts of the charity has been carried out in accordance with the provisions of the Charities Act 2011 and the applicable Directions given by the Charity Commission.		I hereby certify that the examination of the accounts of the charity has been carried out in accordance with the provisions of the Charities Act 2011 and the applicable Directions given by the Charity Commission.	

Accounts

Trustees' Annual Report for the period ending 30th June 2023

Education Otherwise Association charity registration number: 1055120

Objectives

To promote, maintain, improve, and advance public education, particularly by the provision of information, support and facilities to enable parents to make educational provision for their children otherwise than through full time state or private educational institutions.

Activities

Education Otherwise is a membership organisation for the public and social benefit, which provides support and information for families whose children are being educated outside of school and for those who wish to uphold the freedom of families to choose the best form of education for their children.

Our principal aims are:

- To encourage, promote and support learning outside of the school system.
- To reaffirm that parents have the primary responsibility for their children's education and that they have the right to exercise this responsibility by educating them out of school.
- To establish the primary right of children to have full consideration given to their wishes and feelings about their education.
- To promote knowledge, understanding and acceptance of education otherwise than at school in the world at large.

These aims are met via our publicly accessible website as well as through the public helpline and our social media group. Support and information are provided to members, home educators, the media, local and national government and other interested parties including voluntary agencies. In addition, members can take advantage of our free report checking services, discounts, email and internet support.

Local Home Education Groups organised by Education Otherwise members may take advantage of reduced premiums for Public Liability Insurance through our Policy.

Education otherwise is entirely run and managed by volunteers and the main activities undertaken by the charity are in furtherance of the public benefit. In organising these activities, trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The charity continues to make a difference through the support given by our volunteers.

Telephone helpline: Our telephone helpline is services by professionally trained volunteers and receives a significant number of calls. Callers are reassured and supported by the information which they receive. During 2022 to 2023 the number of calls answered was high. This has been primarily as a result of concerns relating to

the conduct of local authorities and parents seeking support with how to home educate.

Website: Our website receives an increasing level of traffic, which has continued to be at high levels throughout the year.

Advice and information: Our fact sheets and information continue to be referred to and to meet the needs of home educating families and other stakeholders. Increasingly, local authorities are referring parents to our services.

Consultations and stakeholder involvement

We continue to be asked to give media interviews and to contribute to consultations.

We have met with a number of other public bodies and agencies in order to raise concerns on behalf of our members and service users.

We have continued to widen our contact base with public bodies and organisations in order to further the needs of our members and service users.

We sit on the small panel of stakeholders working on the development of new home education guidance with the DfE.

We have robustly challenged the new Welsh guidance backed by high quality legal advice.

Initiatives

The Kit award for excellence continues to be well received. The award seeks to encourage excellence in local authority home education practice. Nominations are made by home educating families and awards are based on those nominations. Awards were made on 1st April 2022 to 92 local authorities our next award session is 1st September 2023.

Report checking: Our professional report checking service for members has proven popular amongst members who are reassured by the service being insured, subject to Data Protection regulations and producing a very high level of report acceptance.

Youth panel: shortly before the end of year we instigated a youth panel to provide opportunity to young people to guide how the charity supports them and their needs.

Local Authority Continuous Professional Development (training)

In January 2023 we introduced CPD for local authority staff which has been extremely well received. To the end of the financial year we had presented sessions to approximately 35 local authorities with approximately 15 more booked in. The CPD comes from a position of positive practice and is informed by feedback from members and service users, together with our research into positive practice in highly regarded local authority areas.

Financial Review

Income

Income from all sources is up on 2022 to 2023 at £22,148 compared to £14,977 (total) in 2021 to 2022.

This is primarily through membership income with membership continuing to grow, but also includes reimbursement of funding made of £3,000.

Expenditure

Ordinary operating expenditure this year is £10,742 a rise from £8,658 last year.

Balances

Overall, the charity had a surplus of £11,406 during the financial year, a significant rise on the £6,319 during the previous financial year. Overall, funds held amount to £57,174 which is more than five years of operating expenditure at current levels.

Principal sources of funds

The principal source of funds remains the sale of memberships, together with donations from members and the public. The charity also charges a fee for local groups to be included under the cover of its insurance policy and a portion of the annual insurance fee is covered by this income.

Principal Risks

Possible future decline in income from memberships is a concern which has arisen in previous years, but buoyant membership uptake shows promise for future years. Trustees remain vigilant to the possibility of the effects of increasing inflation and membership numbers falling in the future.

Reserves

The charity currently holds reserves amounting to approximately five years' expenditure. The trustees consider this to be more than adequate and are actively considering ways in which these funds can be used to better support our aims and objectives.

Going concern

The charity's financial position remains secure with no uncertainty about remaining a going concern.

Structure, Governance and Management

Constitution

Education Otherwise Association is a Charitable Incorporated Organisation and is not linked with any other organisation.

Membership

Membership is by annual subscription and is open to individuals and organisations involved with, or having an interest, in home education. Voting rights have been opened to all members upon application in order to increase our democratic approach to governance.

Recruitment and Appointment of Trustees

Trustees are recruited from members who have requisite skills and abilities to support the charity today and into the future. All trustees must be registered members of the charity at the time of appointment. Potential trustees are proposed to the AGM. Trustees are appointed for a term of four years, although they may be co-opted between AGMs. Co-opted trustees must stand down, or stand for election, at the following AGM. A permanent trusteeship can be awarded to one long standing and experienced trustee. This post is currently held by Dr Fe Mukwamba-Sendall as charity President.

There is a stringent interview procedure in place to ensure that potential trustees meet eligibility criteria before being proposed for election or co-opted.

Trustee Induction and Training

New trustees are provided with information about their role and responsibilities as Trustees via the Trustee handbook, trustee forum and remote meetings.

Trustee Associate Role

Trustee associates support trustees in their respective roles and responsibilities. The position of Trustee associates underpins the charity's succession plans.

Reference and Administration

Trustees for the period 1st July 2022 to 30th June 2023

Joined during the period

- Gary Campbell (Co-opted 10th June 2023)
- Katie Cousins (Co-opted 7th March 2023)

Continuing in post throughout the period

- F. Mukwamba-Sendall
- W. Charles-Warner (Co-opted September 2019. Confirmed 12th October 2019)
- A. Neil (Co-opted September 2019. Confirmed 12th October 2019)
- Helena Wilson (Co-opted 15th October 2020, confirmed at AGM 16th October 2020)
- Catherine Boardman (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)
- Merlyn Wright (Co-opted 29th July 2022)
- Rebecca Silverwood (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)
- John Yates (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)

Resignations during this period

- Nektaria Papanicola (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021, resigned 25th November 2022)
- Gabriella Rook (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021, resigned 4th June 2023)
- Ruth March ((Co-opted 11th August 2021, Confirmed at AGM 20th September 2021, [resigned 20th July 2022])

Trustees' responsibilities for the preparation of the financial statements

The trustees are responsible for preparing the trustees report and financial statements in accordance with applicable law and United Kingdom accounting standards.

In preparing those statements, the trustees are required to:

- Select suitable accounting policies and apply them consistently.
- Observe the methods and principles in the Charities SORP.
- Make judgements and estimates that are reasonable and prudent.
- State whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements.

The accounts have been prepared in accordance with the provisions of the Charities SORP.

Declarations

The trustees declare that they have approved the trustees report above Fe Mukwamba-Sendall, Wendy Charles-Warner, Dr Ambroz Neil, Catherine Boardman, John Yates, Helena Wilson, Merlyn Wright, Gary Campbell, Katie cousins and Rebecca Silverwood.

3rd September 2023

Education Otherwise Association
Statement of Financial Activities
For the year ending 30 June 2023

		2023	2022
		£	£
Income & Endowments			
		18,8	14,9
Income	Membership & donations	34	63
		3	
Interest	Investment Income	14	14
Other		3,0	
Income	Other Income	00	-
		<u>22,1</u>	<u>14,9</u>
		48	77
Expenditure			
		8,5	7,9
	Charitable activities	84	56
		2,1	7
	Other expenses	58	02
		<u>10,7</u>	<u>8,6</u>
	Total Expenditure	42	58
		<u>11,4</u>	<u>6,3</u>
	Net movement in funds	<u>06</u>	<u>19</u>

Reconciliation of funds

	45,7	39,4
Total funds b/f	68	48
	11,4	6,3
Net movement in the year	<u>06</u>	<u>19</u>
	57,1	45,7
Total funds c/f	<u><u>74</u></u>	<u><u>68</u></u>

Income & Endowments

Donations and legacies	18,834
Of the total donations and legacies what amount is Legacies	-
Of the total donations and legacies what amount is Endowments received	-
Other trading activity	-
Investment income	314
Income from charitable activities	-
Other income	3,000
Total income and endowments	22,148

Expenditure

Expenditure on raising funds	-
Of total expenditure on raising funds what amount is Investment management costs	-
Other expenditure	2,158
Expenditure on charitable activities	8,584
Of the total expenditure on charitable activities what value is Grants to institutions	-
Of the total expenditure on charitable activities what value is Governance costs	-
Total expenditure	10,742

Other recognised gains / (losses) (prefix with minus symbol if negative value)

Gains/(losses) on revaluation of fixed assets	-
Actuarial gains/(losses) on defined benefit pension schemes	-

Net gains/(losses) on investments	-
Other gains/(losses)	-
<u>Assets</u>	
Total fixed assets	-
Of the total fixed assets what value is Fixed asset investments	-
Total current assets	57,174
Of the total current assets what value is Current asset investments	
Of the total current assets what value is Cash at bank and in hand	57,174
<u>Liabilities</u>	
Creditors due within one year	-
Creditors falling due after one year and provisions	-
Defined benefit pension scheme asset/(liability)	-
Total net assets/(liabilities)	57,174
<u>Funds</u>	
Endowment funds	-
Restricted funds	-
Unrestricted funds	57,174
Total funds	57,174

Accounts

Trustees' Annual Report for the period ending 30th June 2022

Education Otherwise Association charity registration number: 1055120

Objectives

To promote, maintain, improve, and advance public education, particularly by the provision of information, support and facilities to enable parents to make educational provision for their children otherwise than through full time state or private educational institutions.

Activities

Education Otherwise is a membership organisation for the public and social benefit, which provides support and information for families whose children are being educated outside of school and for those who wish to uphold the freedom of families to choose the best form of education for their children.

Our principal aims are:

- To encourage, promote and support learning outside of the school system.
- To reaffirm that parents have the primary responsibility for their children's education and that they have the right to exercise this responsibility by educating them out of school.
- To establish the primary right of children to have full consideration given to their wishes and feelings about their education.
- To promote knowledge, understanding and acceptance of education otherwise than at school in the world at large.

These aims are met via our publicly accessible website as well as through the public helpline and our social media group. Support and information are provided to members, home educators, the media, local and national government and other interested parties including voluntary agencies. In addition, members can opt in to receive news updates, take advantage of our free report checking services email and internet support.

Local Home Education Groups organised by Education Otherwise members may take advantage of reduced premiums for Public Liability Insurance through our Policy.

Education otherwise is entirely run and managed by volunteers and the main activities undertaken by the charity are in furtherance of the public benefit. In organising these activities, trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The charity continues to make a difference through the support given by our volunteers.

Telephone helpline: Our telephone helpline receives a significant number of calls and callers are reassured and supported by the information that they receive.

During 2021 to 2022 the number of calls answered was extremely high. This has been primarily as a result of concerns relating to the Schools Bill and conduct of local authorities.

Website: Our website receives an increasing level of traffic, which has continued to be at high levels throughout the year.

Advice and information: Our fact sheets and information continue to be referred to and to meet the needs of home educating families and other stakeholders. Increasingly, local authorities are referring parents to our services.

Consultations and stakeholder involvement

We gave both written and oral evidence to the Department for Education (DfE), met with Peers and MPs to support home education and raised considerable public interest in issues within the Schools Bill.

We have met with a number of other public bodies and agencies to raise concerns on behalf of our members and service users.

We have widened our contact base with public bodies and organisations in order to further the needs of our members and service users.

Initiatives

The Kit award for excellence seeks to encourage excellence in local authority home education practice. Nominations are made by home educating families and awards are based on those nominations. Awards were made on 1st September 2021 to 95 local authorities and 1st April 2022 to 92 local authorities.

Meet the nurses. This initiative in conjunction with school nurses aims to raise awareness of the school nursing service and its support for home educating families, whilst working with nurses to positively improve the public body narrative of home education. Education Otherwise attends and gifts books to children at each event. Covid 19 pressures, staff shortages in nursing teams and demand on those working in teams has made this difficult this year, but events have nonetheless proven popular.

Report checking: introduction of a report checking service for members has driven a small but worthwhile increase in membership applications.

Financial Review

Income

Income from all sources is very slightly down on the previous year at £14,977 compared to £15,495 (total) in 2020 to 2021.

This is primarily through membership and general donation income. There are indications that membership is continuing to grow with new members having joined during the period following end of year.

Expenditure

Ordinary operating expenditure this year is £8,658, a reduction from last year.

Balances

Overall, the charity had a surplus of £6,319 during the financial year, a significant increase on the £1,534 during the previous financial year. Overall, funds held amount to £45,768 which is more than five years of operating expenditure at current levels.

Principal sources of funds

The principal source of funds remains the sale of memberships, together with donations from members and the public. The charity also charges a fee for local groups to be included under the cover of its insurance policy and a portion of the annual insurance fee is covered by this income.

Principal Risks

Possible future decline in income from memberships is a concern which has arisen in previous years, but buoyant membership uptake shows promise for future years. Trustees remain vigilant to the possibility of the effects of increasing inflation and membership numbers falling in the future.

Reserves

The charity currently holds reserves amounting to approximately five years' expenditure. The trustees consider this to be more than adequate and are actively considering ways in which these funds can be used to better support our aims and objectives.

Going concern

The charity's financial position remains secure with no uncertainty about remaining a going concern.

Structure, Governance and Management

Constitution

Education Otherwise Association is a Charitable Incorporated Organisation and is not linked with any other organisation.

Membership

Membership is by annual subscription and is open to individuals and organisations involved with, or having an interest, in home education.

Voting rights have been opened to all members upon application in order to increase our democratic approach to governance.

Recruitment and Appointment of Trustees

Trustees are recruited from members who have requisite skills and abilities to support the charity today and into the future. All trustees must be registered members of the charity at the time of appointment. Potential trustees are proposed to the AGM. Trustees are appointed for a term of four years, although they may be co-opted between AGMs. Co-opted trustees must stand down, or stand for election, at the following AGM. A permanent trusteeship can be awarded to one long standing and experienced trustee. This post is currently held by Dr Fe Mukwamba-Sendall as charity President.

There is a stringent interview procedure in place to ensure that potential trustees meet eligibility criteria before being proposed for election or co-opted.

Trustee Induction and Training

New trustees are provided with information about their role and responsibilities as Trustees via the Trustee handbook, trustee forum and remote meetings.

Trustee Associate Role

Trustee associates support trustees in their respective roles and responsibilities. The position of Trustee associates underpins the charity's succession plans.

Reference and Administration

Trustees for the period 1st July 2021 to 30th June 2022

Joined during the period

- Merlyn Wright (Co-opted 29th July 2022)

Continuing in post throughout the period

- F. Mukwamba-Sendall
- W. Charles-Warner (Co-opted September 2019. Confirmed 12th October 2019)
- A. Neil (Co-opted September 2019. Confirmed 12th October 2019)
- Helena Wilson (Co-opted 15th October 2020, confirmed at AGM 16th October 2020)
- Catherine Boardman (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)
- Gabriella Rook (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)
- Rebecca Silverwood (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)
- John Yates (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)

- Nektaria Papanicola (Co-opted 11th August 2021, Confirmed at AGM 20th September 2021)
- Ruth March ((Co-opted 11th August 2021, Confirmed at AGM 20th September 2021, [resigned post period on 20th July 2022])

Trustees' responsibilities for the preparation of the financial statements

The trustees are responsible for preparing the trustees report and financial statements in accordance with applicable law and United Kingdom accounting standards.

In preparing those statements, the trustees are required to:

- Select suitable accounting policies and apply them consistently.
- Observe the methods and principles in the Charities SORP.
- Make judgements and estimates that are reasonable and prudent.
- State whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements.

The accounts have been prepared in accordance with the provisions of the Charities SORP.

Declarations

The trustees declare that they have approved the trustees report above Fe Mukwamba-Sendall, Wendy Charles-Warner, Dr Ambroz Neil, Catherine Boardman, Gabriella Rook, John Yates, Nektaria Papanicola, Helena Wilson, Merlyn Wright and Rebecca Silverwood.

23rd September 2022

Education Otherwise Association Statement of Financial Activities For the year ending 30 June 2022

	2022	2021
	£	£
Income & Endowments		
Membership & donations	14,963	15,468
Investment Income	14	28
	<u>14,977</u>	<u>15,495</u>
Expenditure		
Charitable activities	7,956	13,126

Other expenses	702	835
	<u>8,</u>	<u>13,</u>
Total Expenditure	658	961
	<u>6,</u>	<u>1,</u>
Net movement in funds	<u>319</u>	<u>534</u>
Reconciliation of funds		
	39,	37,
Total funds b/f	448	914
	<u>6,</u>	
Net movement in the year	<u>319</u>	<u>1,534</u>
	<u>45,</u>	<u>39,</u>
Total funds c/f	<u>768</u>	<u>448</u>
	-	-

**Education Otherwise
Association
Balance Sheet
As at 30 June 2022**

	2022	2021
	£	£
Current Assets		
Bank	45,768	39,448
Total Assets	45,768	39,448
Current Liabilities	-	-
Net Assets	45,768	39,448
Funds of the Charity		
Unrestricted funds	45,768	39,448
Total Funds Held	45,768	39,448
	-	-

EDUCATION OTHERWISE ASSOCIATION

England & Wales - Charity number 1055120

Accounts

Trustees' Annual Report for the period ending 30th June 2021

Education Otherwise Association charity registration number: 1055120

Objectives

To promote, maintain, improve, and advance public education, particularly by the provision of information, support and facilities to enable parents to make educational provision for their children otherwise than through full time state or private educational institutions.

Activities

Education Otherwise is a membership organisation for the public and social benefit, which provides support and information for families whose children are being educated outside of school and for those who wish to uphold the freedom of families to choose the best form of education for their children.

Our principal aims are:

- To encourage, promote and support learning outside of the school system.
- To reaffirm that parents have the primary responsibility for their children's education and that they have the right to exercise this responsibility by educating them out of school.
- To establish the primary right of children to have full consideration given to their wishes and feelings about their education.
- To promote knowledge, understanding and acceptance of education otherwise than at school in the world at large.

These aims are met via our publicly accessible website as well as through the public helpline and our social media group. Support and information are provided to members, home educators, the media, local and national government and other interested parties including voluntary agencies. In addition, members can opt in to receive news updates, take advantage of our free report checking services email and internet support.

Local Home Education Groups organised by Education Otherwise members may take advantage of reduced premiums for Public Liability Insurance through our Policy.

Education otherwise is entirely run and managed by volunteers and the main activities undertaken by the charity are in furtherance of the public

benefit. In organising these activities, trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Achievements and Performance

The charity continues to make a difference through the support given by our volunteers.

Telephone helpline: Our telephone helpline receives a significant number of calls and callers are reassured and supported by the information that they receive.

During 2020 to 2021 the helpline was upgraded to a new service which has provided a more flexible platform to the trustees and volunteers, this at a slightly reduced cost.

The number of calls answered during this period was exceptionally high, at times up to twelve times the usual caller rate. This increase has been primarily as a result of more individuals considering home education during lockdown periods.

Website: Our website receives an increasing level of traffic, which has continued to be at high levels throughout the year. Trustees were very excited by the launch of our new website, which has brought a more user friendly and modern look to the charity. This has been received favourably from all quarters.

Advice and information: Following receipt of legal advice all of our fact sheets and information were updated to reflect the needs of home educating families and other stakeholders.

Consultations and stakeholder involvement

We gave both written and oral evidence to the Education Committee inquiry into home education which was extremely well received by members and service users.

Trustees argued persuasively for inclusive examination result access for home educating families. This included frequent meetings with OFQUAL, examination boards and Government representatives.

We have met with a number of public bodies and agencies to raise concerns on behalf of our members and service users.

We have widened our contact base with public bodies and organisations in order to further the needs of our members and service users.

Initiatives

At the close of the year, we launched the Kit award for excellence. This award seeks to encourage excellence in local authority home education

practice. Nominations are made by home educating families and awards are based on those nominations. Awards will be made during the upcoming financial year.

Financial Review

Income

Income from all sources is significantly up on the previous year at £10,495.53 compared to £5,537 in 2019 to 2020.

In addition, a £5,000 payment was received from Portsmouth Home Education Group (PHEG) in partial reimbursement of a grant made by the charity.

Membership and general donation income rose significantly from £5,145 last year to £10,467.67 in the year to June 2021. There are indications that membership is continuing to grow with new members having joined during the period following end of year.

Expenditure

Ordinary operating expenditure this year is £5,961.52, a modest increase from last year at £4,790. This expenditure includes a significant cost incurred to renew and update the charity website in order to bring our public facing material into a more user friendly and modern format.

Trustees incurred £8,000 expenditure in the making of a conditional grant to PHEG for funding initial legal costs in taking Judicial review. This was conditional to funds being repaid if sufficient was raised from other sources. £5,000 was repaid within the financial year. The case coming before the court will clarify the duties of local authority staff and parents, providing important guidance for how the charity informs and supports home educating families in the future.

Balances

Overall, the charity had a surplus of £1533.81 during the financial year, a significant improvement on the deficit of £453 during the previous financial year. Overall, funds held amount to £39,448.26 which is more than six years of operating expenditure at current levels.

Principal sources of funds

The principal source of funds remains the sale of memberships, together with donations from members and the public. These latter increased throughout the year following introduction of fundraising initiatives. The charity also charges a small fee for local groups to be included under the cover of its insurance policy and a portion of the annual insurance fee is covered by this income.

Principal Risks

Possible future decline in income from memberships is a concern which has arisen in previous years, but buoyant membership uptake shows

promise for future years. Trustees remain vigilant to the possibility of the 'Covid effect' reducing and membership numbers falling in the future.

Reserves

The charity currently holds reserves amounting to approximately six years' expenditure. The trustees consider this to be more than adequate and are actively considering ways in which these funds can be used to better support our aims and objectives.

Going concern

The charity's financial position remains secure with no uncertainty about remaining a going concern.

Structure, Governance and Management

Constitution

Education Otherwise Association is a Charitable Incorporated Organisation and is not linked with any other organisation.

Membership

Membership is by annual subscription and is open to individuals and organisations involved with, or having an interest, in home education. Voting rights have been opened to all members upon application in order to increase our democratic approach to governance.

Recruitment and Appointment of Trustees

Trustees are recruited from members who have requisite skills and abilities to support the charity today and into the future. All trustees must be registered members of the charity at the time of appointment. Potential trustees are proposed to the AGM. Trustees are appointed for a term of three years, although they may be co-opted between AGMs. Co-opted trustees must stand down, or stand for election at the following AGM. A third of elected trustees are currently required to stand down by rotation at each AGM.

There is a stringent interview procedure in place to ensure that potential trustees meet eligibility criteria before being proposed for election or co-opted.

Trustee Induction and Training

New trustees are provided with information about their role and responsibilities as Trustees via the Trustee handbook, trustee forum and remote meetings.

Trustee Associate Role

The charity has established an additional group of officers, trustee associates, to support trustees in their respective roles and responsibilities. The position of Trustee associates underpins the charity's succession plans.

Reference and Administration

Trustees for the period 1st July 2020 to 30th June 2021

Joined during the period

- Kate Woodley (Co-opted 22nd July 2021. Confirmed at AGM 16th October 2020)
- Helena Wilson (Co-opted 15th October 2020, confirmed at AGM 16th October 2020)

Continuing in post throughout the period

- F. Mukwamba-Sendall
- W. Charles-Warner (Co-opted September 2019. Confirmed 12th October 2019)
- A. Neil (Co-opted September 2019. Confirmed 12th October 2019)
- Carol Dyer (Co-opted 27th April 2020)

Retired during the period

- Carol Dyer (Retired 30th June 2021)

Trustees' responsibilities for the preparation of the financial statements

The trustees are responsible for preparing the trustees report and financial statements in accordance with applicable law and United Kingdom accounting standards.

In preparing those statements, the trustees are required to:

- Select suitable accounting policies and apply them consistently.
- Observe the methods and principles in the Charities SORP.
- Make judgements and estimates that are reasonable and prudent.
- State whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements.

The accounts have been prepared in accordance with the provisions of the Charities SORP.

Declarations

The trustees declare that they have approved the trustees report above Fe Mukwamba-Sendall, Wendy Charles-Warner, Ambroz Neil, Helena Wilson and Kate Woodley.

6th August 2021

Accounts 2020 to 2021

Closing balance 2020	39,971
Creditors due recorded last year	-2,172
Balance brought forward	37,799
Creditors due recorded last year	2,172
Actual creditors due and paid in the 12 month period	2056.55
Difference	115.45
Actual balance brought forward	37,914.45

Income

Membership fees and donations	15467.67
Interest	27.66
Total income	15495.33

Outgoings

IT and tech	4058.96
Refund member fees	2.00
Miscellaneous	667.80
Insurance	830.36
Grant to PCC	3000
Grant to PCC	5000
Postage and stationery expenses	236.75
	165.65
Total outgoings	13961.52

Opening balance	-37,914.45
Closing balance	39,448.26
Profit	1,533.81

**Amount to carry forward:
£39,448.26**

Income	15495.33
Outgoings	-13961.52
Profit	1,533.81

Recognition of income

Income is included when the charity becomes entitled to the resources; it is more likely than not that the trustees will receive the resources and the monetary value can be measured with sufficient reliability.

Grants and donations

Grants and donations are only included when the general income recognition criteria are met. The charity has not received government grants in the reporting period.

Support costs

The charity has incurred expenditure on support costs.

Volunteer help

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

Income from interest, royalties and dividends

This is included in the accounts when receipt is probable and the amount receivable can be measured reliably. No royalties or dividends have been received during the financial year.

Income from membership subscriptions

Membership subscriptions which give a member the right to services or other benefits are recognised as income earned from the provision of goods and services as income from charitable activities.

Liability recognition

Liabilities are recognised where it is more likely than not that there is a legal or constructive obligation committing the charity to pay out resources and the amount of the obligation can be measured with reasonable certainty. No liabilities are due in the next twelve months.

Redundancy cost

The charity made no redundancy payments during the reporting period.

Deferred income

No material item of deferred income has been included in the accounts.

Creditors

The charity has no current creditors

Provisions for liabilities

The charity has no current liabilities.

Debtors

The charity has no current debtors

Current asset investments

The charity has no investments holding its monetary assets in bank accounts (deposit and savings).

Material assets

Two telephones of nominal value.

Transactions with trustees and related parties

No trustees have been paid any remuneration or received any other benefits from an employment with their charity or a related entity

The trustees confirm acceptance of the accounts.

Fe Mukwamba-Sendall, Ambroz Neil, Wendy Charles-Warner, Helena Wilson and Kate Woodley