

## **Trustees' Annual Report for the period ending 30<sup>th</sup> 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 1<sup>st</sup> September 2021 to 95 local authorities and 1<sup>st</sup> 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 29<sup>th</sup> July 2022)

Continuing in post throughout the period

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

23<sup>rd</sup> September 2022

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

	<b>2022</b>	<b>2021</b>
	<b>£</b>	<b>£</b>
<b>Income &amp; Endowments</b>		
Membership & donations	14,963	15,468
Investment Income	14	28
	<u>14,977</u>	<u>15,495</u>
<b>Expenditure</b>		
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>
<b>Reconciliation of funds</b>		
	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**

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