

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