



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 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)

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



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Total current assets (cash in bank)	61,993
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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
EDDIX
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

23860197102

• accounting records were not kept in accordance with section 130

October 2018