



ANNUAL REPORT

2020 – 2021

PH^{OX}ENIX
EDUCATION

FREEDOM
TO
LEARN

The Phoenix Education Trust is a charitable company limited by guarantee. It was incorporated on 23 October 2000 and is governed by its Memorandum and Articles of Association.

The Trustees, who are also the Directors for the purposes of Company Law, present their report and the audited Financial Statements of the Charity for the year ended 31 March 2021.

Reference and Administrative Information

Registered Company Number: 4094988

Registered Charity Number: 1084686

Registered Address: The Phoenix Education Trust, Common House, Unit 5E, 5 Pundersons Gardens, London E2 9QG.

Bankers: CAF Bank Limited , Kings Hill, West Malling, Kent, ME19 4TA.

Accountants: Prentis & Co. LLP., 115c Milton Road, Cambridge, CB4 1XE.

Contents Page

<i>Forward by the Co-Chairs</i>	1 – 3
<i>Our Vision</i>	4
<i>Our Values</i>	5
<i>Current Projects</i>	6
<i>Changemakers Lab</i>	6 – 10
<i>Freedom to Learn</i>	10 – 14
<i>Resources for the Mainstream</i>	15
<i>Reflections on COVID-19</i>	16 – 18
<i>Our Team</i>	19
<i>Policies</i>	20
<i>Donate</i>	21
<i>Statement of Financial Activities</i>	22 – 29

The year's overview

CHAIR'S FORWARD

At the Annual General Meeting in October 2020, we had a 'virtual campfire' to celebrate the 20th birthday of Phoenix Education. People told origin stories of the organisation and shared their own experiences of how they had become involved and what had happened for them. We talked of the Covid-19 lockdown and dreamed of a time when we would be able to meet again in person. None of us imagined that - one year later - that time would not yet have come. The world has tilted on its axis and so many things have changed. The virtual world has, for many, become the most-real world that we inhabit. 'Working from home' has become permanent. Fear of resuming in-person contact and face-to-face work is high whilst simultaneously being tantalisingly close. Meanwhile, the day-to-day

work of Phoenix Education goes on. Projects continue to survive and thrive. Fundraising efforts continue. Our commitment to working alongside young people and with our collaborators to improve young people's experiences of education is as strong as ever. At this point - our 21st birthday - we are ready to look to the future and to build on our strong foundations. We hope you will join us in this ambition.

This report outlines the details of the financial and operational activities that cover the time period from April 2020-March 2021. The two main projects - Changemakers Lab and Freedom to Learn - have continued in their activities, overcoming the considerable challenges presented by Covid-19 lockdowns. All face-to-face work has taken place

The year's overview

... CONTINUED

online, including recruiting and supporting young activists in their campaign work, and co-ordinating the 10-day Freedom to Learn Forum that took place in August 2020. Although no-one would have chosen to operate exclusively through online organising, there is no doubt that there have been unexpected benefits to this enforced change of practice, especially in terms of accessibility and cost.

Our superb staff team, led by Sophie Christophy as CEO, has worked from home for the entire duration of this Annual Report. New members of staff have been recruited, inducted, and have carried out their roles without having ever met the rest of the team in the 'real world'. The way that this has taken place has been remarkable, and the trustees are extremely

grateful to Sophie for steering Phoenix Education through such challenging times, and to the rest of the team for the skills, creativity, openness and resilience that they have brought to all of their endeavours.

Our financial situation has been unexpectedly robust this year, as a result of the generosity of funders who have been willing to flex in the light of the implications of Covid-19. As ever, we are extremely grateful to our key partners and supporters, especially Paul Hamlyn Foundation, Joan Ainslie Charitable Trust, and Meadowbrook Charitable Trust, and are excited to have entered a new relationship with Edge Foundation that will shape significant new work in 2021-22.

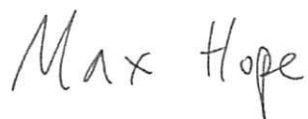
The year's overview

... CONTINUED

At the point that this Annual Report is being presented at our AGM – November 2021 – we have a new CEO in place. Justin Maroy replaced Sophie in the summer of 2021. We thank Sophie for all of her work with Phoenix, and we welcome Justin to the role. We are looking forward to introducing him to the Guardian Members and to working with him to build our strategy and operational plans in the months ahead.

Yours Sincerely,

Dr. Max Hope

A handwritten signature in black ink that reads "Max Hope". The script is cursive and fluid.

Abi Knipe

A handwritten signature in black ink that reads "A Knipe". The script is bold and stylized.

Co-Chairs of the Board of Trustees

What drives us

OUR VISION

For over 20 years, Phoenix Education has been working to shift school cultures and the education system to become more democratic, collaborative, rights-based and anti-oppressive spaces for the people within them.

Our aim and vision is of a system of education in which children and young people are seen and heard as whole human beings with rights, where they can explore their interests and sense of self in an authentic and meaningful way, and actively pursue an education that is relevant to their lives and the circumstances of the world that we live in.

Values-Led

Phoenix is a values-led organisation, and our guiding values are: equality and equity, autonomy, collaboration, agency and authenticity. These are the values we would like to see underpin the education system, and they are values through which we endeavour to do our work.

Our underpinning aim, as stated in our governing documents, is:

“The Phoenix Education Trust provides support and advice to teachers, headteachers, pupils and students on how to embed collaborative cultures for more meaningful and effective educational experiences for all members of the community. The Trust supports democratic education where young people have a right to have a say over their own education.”

Adultism Aware

We have an awareness of the marginalisation, discrimination, prejudice and stereotyping that young people can experience based on their age, that directly impacts their experience of the education system, and can be a threat to their autonomy, agency, and rights. We are mindful of how this bias can show up in ourselves and our work and challenge it when we see it at ‘home’ and elsewhere.

Partnership-Oriented

We have big ideas and a commitment to making lasting change. We know the best way we can do this is by collaborating with other organisations and activists that care about the same things that we do. We are always on the look-out for creative opportunities to join forces with others committed to change.

What we stand for

OUR VALUES

Equality

When adults and children see themselves as equal partners in the learning journey, mutual trust and respect becomes the foundation for deep educational engagement.



Autonomy

When students are able to follow their own interests and learn because they want to, they stay curious, and grow in their power and passions.



Collaboration

Progress happens when we work together and being part of a team is an essential part of our happiness. This is how society evolves.



Agency

When every member of a learning community has input and influence, they learn how to have a positive impact on the world around them.



Authenticity

To function in the real world, students need to be involved in the real world. The society around us can be our classroom.



Current Projects

This year, Phoenix Education has been working on two main projects: Changemakers Lab and Freedom to Learn. There is a third project to create resources and training for innovators in mainstream schools which is also introduced here.

Changemakers Lab

CHANGEMAKERS LAB

Working with young people
to transform the education system



The Changemakers Lab (CML) began at the start of 2020 and is due to be completed by Spring 2022. It is part of the Act for Change initiative, a cohort of organisations supporting young people working for change, funded by the Paul Hamlyn Foundation and Esmée Fairbairn Foundation in partnership with the National Lottery Community Fund.

Changemakers Lab brings together young activists to research, design, and implement meaningful campaigns for change in the education system, and to explore differences and the role of solidarity in changemaking.

Changemakers Lab invites student activists aged 14-18 from different backgrounds and locations in the UK to work together to campaign for reform in the education system – ensuring it better reflects the needs and rights of young people...

... Continued

The Changemakers Lab (CML) facilitated:

- Creating online facilitated space for young changemakers to come together and supporting student only spaces and actions.
- Developing and deepening understanding of the issues in school and the education system that affect them and others.
- Building relationships and networks with other education changemakers and campaigners.
- Exploring and actioning ways to stimulate and create change.

Changemakers Lab ran its first programme cycle of online training and workshops with a cohort of young activists from April - July 2020 and then worked alongside the Freedom to Learn Team to offer open-access changemaker sessions during the Freedom to Learn Forum in August, some organised by staff and some by young people.

During the first cycle of online training, it became apparent that a particular group of young people, those from refugee backgrounds for whom English was a second language, were experiencing significant barriers to fully engaging with the sessions. Given that Changemakers Lab was a three-way collaboration between Phoenix Education, the Refugee Support Network and Student Voice, it was vital to pivot to find more appropriate ways of working with these particular young people. In July 2020, staff offered an innovative face-to-face summer school to refugee students at Newman Catholic College. These bespoke sessions used circling, collage-making and storytelling to support young refugees to express their lived experience at school.

... Continued

Tweet

Changemakers Lab Retweeted



Yumna Hussien
@Yumna_Hussien

@ThePupilPower session hosted by @aliyahiyork was absolutely inspirational today! My favourite panel was definitely the culture, class and race panel which expressed young people's powerful opinions on how this affects the current education system!

Page mentions



We Learn Naturally
32 m ·

Here is another by donation online learning opportunity you might enjoy. (This one is inspiring our own conference efforts coming this fall 🌟.)

Freedom To Learn in the UK is organizing a conference to inspire us to reimagine what education could be. Here is the link!

-Erin

<https://freedomtolearn.uk/index.php/what-s-on/freedom-to-learn-forum-2020>



FREEDOMTOLEARN.UK
Freedom to Learn 2020
Freedom to Learn Forum.
Working together for more freedom, autonomy and social...

You and 1 other



Changemakers Lab Retweeted
Teach the Future · 14/08/2020
It was great to see some of our campaigners speak at the #BigStudentCallUp this evening!

A massive thank you to @ThePupilPower for hosting the climate education panel!



Changemakers Lab Retweeted
Dr A.J Fensham · 14/08/2020
Brilliant & inspiring panels led by young people from all corners of the UK this evening-covering so many important issues for ed. reform. Thanks @ThePupilPower @PhoenixEdu_ @Freedom2LearnUK

02-UK 12:52 21%
Hannah Wilson #Ubuntu - Zn
Freedom to Learn: Diverse Educators



Freedom to Learn Festival
Diverse Educators: Why do we need to ensure that our schools are inclusive and create a sense of belonging for all?



Hannah Wilson #Ubuntu @Ethical...
Freedom to Learn: Diverse Ed...

5 23 18



Wirral Governor
@WirralGov

Replying to @Ethical_Leader

Good morning and sharing with my networks.



Innovate Journal Retweeted
Centre for Teachers & Teaching Research · 1h
How can University research contribute to radical changemaking in Education? Find out tonight at 5pm with our very own @edmmills Register at eventbrite.co.uk/e/universities...

@PhoenixEdu_

@Freedom2LearnUK
#changemakers



Universities and Activism
eventbrite.co.uk

1 4 4

Tweets

Tweets & replies

Media

Likes



Pupil Power @Th... · 15/08/2020
Thank you to all of our incredible young Hosts and Panelists for smashing the #BigStudentCallUp 2.0 seminar yesterday!

Thank you to all our attendees. We really hope that you left feeling even more inspired to go out there and change the world... We've got you!

1 5 15

Show this thread



Pupil Power @Th... · 15/08/2020
And if you enjoyed yesterday click the link to find so many more! Spring events by @PhoenixEdu_ @Freedom2LearnUK @ChangemakersL freedomtolearn.uk/index.php/what...

1 5 10

Tweets

Tweets & replies

Media

Likes

EDIT - Education in Transformation
10 h ·

It begins TODAY! August 14 - 23

The Freedom To Learn Forum is 10 days of events celebrating freedom, autonomy and social justice in education, ONLINE and entirely FREE.

Get in on your chance Workshops, Conversations, interested in human-centred practice in education,



Attachment Parenting UK
5 m ·

Check out this amazing event from Freedom To Learn

• Pupil Power: School

• An Intro to Compassion for Children

• Address the Harm: Decolonisation

• Creative Ecosystem

• Podcasting for Char

• Exploring Mutual Aid

• How to set up a Self

+ Much more!



Freedom To Learn
Posted by Sully Hall
11 h ·

We are excited to announce that due to the AMAZING response we've had from participants, and the HUGE LINEUP of events submitted to the open space programme, we are now closing submissions for new events!

This is necessary in order to ensure the smooth running of our first online forum.

You can check out the lineup of free events and book your tickets here: <https://www.eventbrite.co.uk/o/freedom-to-learn-12778585299>

Freedom To Learn UK network



Centre for Teachers & Teaching Research

@ioecttr

Centre for #Teachers and #Teaching Research @IOE_London, @UCL. Join our mailing list eepurl.com/g8vGrH

@ Bedford Way, London WC1H 0AL

ucl.ac.uk/ioe/departments...

Joined July 2018

226 Following 994 Followers

Followed by Martin Mills, Kav



Changemakers Lab Retweeted
notatrend @not... · 15/08/2020
Not too late to get your tickets for our event on Monday as part of the @Freedom2LearnUK forum!! Open to all so share with a friend. Come be part of an amazing discussion; have your questions and comments at the ready! eventbrite.co.uk/e/uk-schools-a...

#notatrend



2 5 10

Show this thread

... Continued

During the Autumn, staff collaborated with young people to co-create a new website, the [Change Collective website](#), to put resources and materials into the public domain that had been utilised in the workshops. Launched in February 2021 during a public event hosted by young activists, this resource hub is a source of materials by young people for young people on how to fight for justice.

Changemakers Lab did not have a pre-set idea about what types of campaigns the young activists might choose to run, so it is perhaps interesting to note that the vast majority were connected with social justice and equalities. Three campaigns that emanated from the first programme cycle were: *Not a Trend* (focusing on decolonising education), *Same Class* (striving to flatten out inequalities due to class), and *React Accordingly* (a campaign for feminism in schools). Of these, *Not a Trend* has sustained the greatest momentum. This campaign, which fights against racial injustice and strives to ensure that decolonising education is not simply another hashtag, was initiated and run by two South-London based changemakers and students Ava and Simi with the facilitation of Phoenix Education. Throughout the year, they have been persistently working on their campaign, including speaking at numerous events, organising events themselves, and developing their strategy for working with schools.

In order to support the momentum for campaigning on social justice issues, including anti-racism and decolonising education, specialist facilitators were recruited to work within Changemakers Lab. They offered one-to-one mentoring and support to young activists such as Simi and Ava, as well as co-creating and running a second cycle of online training. This started in February 2021 and included intense 'Easter Labs' which took place in the Easter holidays, where they developed their language for campaigning and social justice issues.

... Continued

In January 2021, Changemakers Lab supported young education activists to partner with Diverse Education, convening a panel as part of #DiverseEd Virtual III - a series of webinars designed to support educators committed to increasing diversity in education. This was the first time Diverse Education had centred young activists in a panel, and it was the first youth only panel to ever be featured in their events. It was hosted by Aliyah York from Pupil Power. Changemakers Lab has benefitted hugely from its close collaboration with Pupil Power, an entirely student-led movement aiming to educate and engage young people on educational policy that affects them and their experience of school.

Over 100 young people have been directly involved, directly affected, or influenced by the Changemakers Lab programmes from April 2020-March 2021, and over 214 since inception.

Freedom to Learn



Freedom to Learn is a project, space, grassroots network, manifesto, and annual event, working to advance freedom, autonomy and social justice in education. Freedom to Learn promotes human-centred, self-directed and rights-respecting practice in and outside the mainstream education system and advocates for more voice, choice and influence for children and young people in what, when and how they learn. The high-profile Freedom to Learn Forum is the most visible event that is organised by Freedom to Learn. This was hosted as an online event in August 2020, the first time that it had taken place in a 'virtual world' rather than in a face-to-face location.

Freedom to Learn, continued...

"Inspiring and full of action-based learning. This is the most alive and vibrant event about education I've ever attended."

2020 F2L Forum Participant

"Does anyone else have forum withdrawal? Thank you so much to everyone involved in organising this event and I look forward to the next one!"

2020 F2L Forum Participant

The Freedom to Learn Forum has been an annual event for the past three years, and is a place for children, parents, educators and allies to gather together, get inspired, and explore what a fairer, freer, more democratic education and society can look like. The first online Freedom to Learn Forum was a tremendous success. Fifty events took place over 10 days, with over 1,000 participants taking part. Participation in all events was free, and participants were able to sign up from all over the world. All events were proposed through an open access method, and there was a huge range, including those hosted by adults, by young people, by innovators in the mainstream, by academics, and by those in alternative settings. There were discussions, talks, debates, film screenings, and interactive sessions. In the end, the staff team had to close the applications for new events, because the schedule for 10 full days had been filled.

The full schedule of events can be accessed on the [Freedom to Learn website](#), but listed on the next page are some examples to give a flavour...

Freedom to Learn, continued...

Pupil Power: School Post Lockdown

Student activist Aliyah York hosts a discussion about school post-lockdown.

'Post Lockdown'. Meet my Pet; all ages (and species) welcome!

Introduce the fluffy, scaled, and feathered, creatures in your home.

Freedom to be Exceptional for Visual Learners

Try out for yourself how your own mental images improve your visual learning, with Olive Hickmott.

Storytelling for Wellbeing and Creativity

A creative workshop with Carol Whibley, using sand tray and symbols to explore our personal stories.

Ask the Headteacher - How Can We Change Our Schools?

Headteacher Mark Pritchard takes questions from students on how they can go about raising issues in their school.

A New Educational Paradigm

Why the current schooling paradigm is fundamentally flawed, with Ian Cunningham and Artemis D Bear.

Raising Revolutionaries

How self-directed education can empower children to create a better future, with Sophie Lovett.

Podcasting for Changemaking

Join this workshop with Gem Kennedy, creator of the *Queers & Co.* podcast, as they share how and why podcasting can help your activism.

Super-powered

Finding the benefits of Neurodiversity: An event to explore the lived experiences of neurodiversity and the positive aspects of being different.

Freedom to Learn, continued...



Sarah Louise Esau

Thankyou, it's been such a great event & I'm sad it's over! It had a real community feel, which surprised me being online - loved all the workshops I managed to get to & looking forward to the podcasts of the ones I missed



I hanks so much to everyone who volunteered their time, it was really great.

3 h Love Reply



Jo Jo Merrett ▶ Freedom To Learn UK Network

17h

I've loved being part of this, thank you!



Max Hope, Sophie Christophy and 5 others

3 Comments



Like



Comment



Sarah Louise Esau

Thanks Jo Jo Merrett for your important research;)

Like Reply 16h



Claire Webb @LooWebb · 15h

Replying to @_MissingTheMark and @Freedom2LearnUK

Thank you for today..very informative and has given me the drive to try to provide a provision that meets the real needs of children to access an education that suits them and supports them into adulthood



1



1



2



Nia Richards

Well done everybody, brilliant effort!



2

#FreedomtoLearn2020



Laura S-b Panda ▶ Freedom To Learn

19h

Does anyone else have forum withdrawal? Thank you so much to everyone involved in organising this event and I look forward to the next one in the coming weeks (don't burst my bubble of delusion..)



Sara Martins

Time to put your feet up in pure happiness!!! You made it happen and it was great!!!! The little I managed to attend was refreshing and special... Gave a sense of of much needed connection and was kept a safe space to share emotions and ideas! THANK YOU SO MUCH!!!! You are AMAZING!!!



Amy Poole

Thank you to everyone involved! It's been fabulous

Like Reply 13h



2



Claire Thomas

Huge thanks to everyone involved and all the hard work. I was sorry to only make it to two but they were both brilliant.

Like Reply 12h



2



Natasha Gossett

I really enjoyed all of the workshops I attended. Inspiring, clear, well run, informative. So good to see people too! Really super grateful to you all for the effort

Dhamayanthi Sangarabalan

Thank you! I have been totally inspired and motivated and have learnt so much! Thank you to everyone who shared their experiences, led discussions etc. Such a wonderful community feel!

1 h Love Reply



2

Artemis D Bear

Thank you so much. This event has been everything!

Freedom to Learn, continued...

"It's so validating and energising to spend time with so many wonderful, compassionate, deeply thoughtful people."

2020 F2L Forum Participant

"Thank you for today. Very informative and has given me the drive to try to provide a provision that meets the real needs of children to access an education that suits them and supports them into adulthood."

2020 F2L Forum Participant

In addition to the Forum, staff at Freedom to Learn also create podcasts and blogs to share good practice and new ideas from among the network and support an active Facebook community of parents, educators and other allies that share our vision. Information on all Freedom to Learn activities are available on the standalone website for Freedom to Learn which was launched in early 2020. This promotes the manifesto, showcases the breadth and types of practice represented amongst members, and helps new people to understand how they can access support. There is an interactive UK directory which maps the individuals, schools and organisations which practice or support 'freedom to learn'.

Freedom to Learn also supports self-directed learning communities to grow and thrive by hosting and co-ordinating monthly online calls for founders and facilitators. This year, the group has worked together to co-create an extensive start-up toolkit to support new start-ups. Phoenix Education hopes to expand this work by developing opportunities for network members to offer training to a wider public, responding to the large number of enquiries we receive from those looking to develop their own settings, and furthering our mission of supporting the growth of innovative educational alternative practices, within or outside of the mainstream.

Resources and Training for Innovators in Mainstream Schools

Phoenix Education, since its inception, has had ambitious plans about wanting to influence mainstream educational practice. This is built into the fabric of the founding documents and organisational values.

This year has seen the emergence of new relationships and partnerships which aim to work towards developing new projects in this arena. One of these partnerships is with Edge Foundation, an innovative funder with a strong agenda about transforming education that aligns well with many of the principles and values of Phoenix Education. The groundwork for building this relationship was initiated during this reporting year, including the negotiations for an initial grant to create new resources which, once finalised, can be used to support training in schools, colleges, and other educational institutions with aspirations to develop cultures of youth voice and agency.

Reflections

IMPACT OF COVID-19

As the UK went into national lockdown for the first time, Phoenix Education published free tailor-made resources to support mainstream schools to be creative and progressive with the 'home-schooling' challenge. These Guidance Materials resulted from conversations with a Head Teacher in one secondary school, Passmores Academy, and offered advice, support and practical suggestions for schools who were encountering the challenges of being forced to close and yet still offer 'education' for children and young people whilst at home. The Phoenix Education documents were designed to support a teaching and learning culture shift towards self-directed education and came in three packages: support for schools; support for parents' support for students.

The Covid-19 pandemic made 2020-21 an extremely interesting year for Phoenix Education. The impact of Covid-19 lockdowns on the work of Phoenix Education was substantial, and yet, offered some unexpected opportunities.

There have been three areas for reflection for the staff team and trustees.

First, staff and trustees could not meet in person for the entire period that is covered by this report. Our CEO, Sophie Christophy, started in post in March 2020 and immediately the UK went into lockdown. She managed the staff team and all Phoenix projects without being able to meet anyone in person, and without being able to use the Phoenix offices. All staff meetings and staff

*Reflections***... CONTINUED**

communication went online, as did all Trustee meetings. Home working has its advantages as well as its challenges, as has been widely reported in other organisations. At Phoenix, there has been a long-standing concern about staff working outside of their paid hours and not always maintaining a healthy work-life balance, and there was a danger that this might be exacerbated with home working. Having an awareness of this, nonetheless, meant that new working practices could be introduced which consciously created cultures of self-care and of holding clear boundaries. Phoenix has benefitted from these new working practices and will continue to hold an awareness of these in the future.

Second, the work of Changemakers Labs changed dramatically as all interactions with young people had to take place online, rather than through in-person workshops and residencies. By working with the young people engaged in the project to map and make use of the spaces, platforms, and technologies they already use to come together with friends, as well as skilling up on Zoom and other online based collaborative tools, Phoenix was able to continue with the project in a smooth and stable way. Although making these adaptations were initially challenging, it has certainly been easier to connect with geographically dispersed young people and bring them into shared online spaces on a regular basis, which would not have been possible had we not moved to online working.

*Reflections***... CONTINUED**

The Freedom to Learn Forum, usually an in-person paid event that spans several days, switched to being a free 10-day event that took place online. Although there was no precedent for hosting a self-directed, community-generated event using online technology, the team were extremely innovative in the way that they blended such a huge number of events and a varied programme. As a result of going online, and being free to access, a far greater number of people were able to contribute and participate, and participants came from all over the world.

The AGM in November 2021 will be the first time when staff, trustees and Guardian Members will have had the opportunity to meet in person for over 18 months. The Phoenix team has been capturing learning from our experiences working virtually and will bring this for review as we develop our plans for the coming year and beyond. As we weigh the benefits and disadvantages of online convening with face-to-face work in terms of effectiveness, inclusion and other important factors, it seems likely that we will develop a more intentional hybrid approach to projects going forward.

OUR TEAM

Phoenix's work is delivered by a small and dedicated staff team, with support and oversight from a Board of Trustees, and Guardian Members. The Trustees, as Charity Trustees and Directors, share overall accountability for the Charity's management. Phoenix's Guardian Members have an important role, providing an impartial check and balance that holds the trustee board to account and ensures the charity operates in alignment with its fundamental values.

Staff Team and Consultants

Sophie Christophy, Chief Executive Officer (March 2020 to July 2021)

Siana Bangura, Anti-Racist and Decolonising Education Campaign Facilitator (from February 2021)

Lucy Delaney, Student Campaigns Coordinator (from July 2020)

Tom Oberst, Changemakers Lab Facilitator (from February 2020 – July 2020)

Rowan Salim, Programmes Lead (until September 2020)

Artemis Bear, Freedom to Learn Network Lead (Maternity Cover) (from February 2021)

Sally Hall, Freedom to Learn Network Lead (on Maternity Leave from March 2021)

Suzanne Harris, Web Design (Consultant)

Trustees

The Trustees are elected by the Guardian Members at the AGM. The Trustees have the power to co-opt Trustees to serve until the next AGM and to appoint the Chair.

Trustees serving during the year and since the year-end were as follows: Max Hope (Co-Chair), Abi Knipe (Co-Chair), Jessica Gribble (Appointed June 2020), Thea Pilkian-Strachan, Jemima Waller (Resigned March 2021) Sophie Lovett (Appointed April 2021), and Catherine Starkey (Appointed October 2021).

Volunteers

Trustees would like to say a huge thank you to all our volunteers during 2020-21, particularly Phoenix's Guardian Members and the team of volunteers who helped facilitate the Freedom to Learn Forum.

Guardian members from 2020-21: Alice Astor, Amanda Bellamy, Kaia Bellamy, Josh Fein-Brown, Jessica Gribble, Dan Ford, Derry Hannam, Laura Quick, Henry Readhead, Rachel Roberts, Anil Sarna, Danny Whitehouse, Immalee Wild, Theodore Young.

POLICIES

Risk Management

The trustees have a risk management policy which involves:

- Monthly meetings to monitor the financial position of the charity as well as performance against project objectives.
- Quarterly review of key risks and uncertainties.
- The development and implementation of policies and procedures to mitigate and, or, address said risks and uncertainties - for example, comprehensive review of Phoenix Education's safeguarding procedures as part of Changemakers Lab's transition to online working.

We have identified a number of on-going risks linked to the Covid-19 pandemic, including to staff well-being, new pressures on school budgets and capacity, and the likelihood of an increasingly competitive charitable funding environment. Major work streams, including Changemakers Lab and the 2020 forum have been moved online and feedback from participants and funders is that this has been highly successful. Risks and opportunities will be monitored closely to decide how Phoenix Education can best respond to the pandemic in the medium and longer term.

Remuneration

Trustees and Guardian Members give their time freely. During 2020-21 no trustee or Guardian Member received remuneration or other benefits from their work with the charity. The remuneration of senior staff is reviewed annually and normally increased in accordance with average earnings. Core working hours are reviewed when needed to take into account additional project work and remuneration is then revised accordingly. The most recent systematic review was completed in January 2020. Remuneration is adjusted where needed to ensure the financial security of the charity.

Reserves Policy

The trustees believe that the charity should hold financial reserves in order to enable it to maintain its services in the event of temporary funding shortfalls, to invest in innovations and improvements, and to meet its contractual commitments. Unrestricted funds and liabilities are reviewed quarterly at trustee meetings.

Support our work

DONATE TO PHOENIX

“I am clearer on how I should raise issues and concerns and how to hear other people’s.” – Young Person

“I learnt about democracy and how important it is to listen to objections.” – Young Person

Every gift is important—thank you for your support. Your gift helps schools around the country to genuinely and impactfully activate student voice. We collaborate with class teachers, senior leadership, and the whole school community.

With your support young people can spend more of that time

- Reflecting on and recreating their educational experience, their school structures and having a more engaging learning experience.
- Genuinely using their voice to create change in their school and wider community.
- Working with senior staff, teachers and peers in an equitable and mutually-respectful manner.

The Trust champions principles of democracy, agency, and collaboration and as little as £10 a month can help us to be responsive to the needs of the young people we serve and support, and we in turn depend upon the generosity and support of those who share our passion for education innovation.

You may [Donate Here](#).

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE PHOENIX EDUCATION TRUST
FOR THE YEAR ENDED 31ST MARCH 2021

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31st March 2021.

RESPONSIBILITIES AND BASIS OF REPORT

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').


Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

INDEPENDENT EXAMINER'S STATEMENT

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities [applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)].

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


IAN SHIPLEY FCCA
FOR AND ON BEHALF OF
PRENTIS & CO LLP
CHARTERED ACCOUNTANTS
& INDEPENDENT EXAMINERS

115c Milton Road
Cambridge
CB4 1XE

16 December 2021

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31ST MARCH 2021

CURRENT YEAR	Note	Unrestricted Funds £	Restricted Funds £	Total 2021 £
Income				
Donations, legacies & similar income				
Donations		1,440	-	1,440
Grants receivable	2	-	74,750	74,750
Interest receivable		21	-	21
Training and events		720	-	720
Total Income		2,181	74,750	76,931
Expenditure				
Costs of raising funds	4	63	-	63
Charitable expenditure	5	2,859	38,879	41,738
Total Expenditure		2,922	38,879	41,801
Net (expenditure)/income and net movement in funds for the year		(741)	35,871	35,130
Transfers between funds		8,005	(8,005)	-
Total funds brought forward		4,741	47,661	52,402
Total funds carried forward		12,005	75,527	87,532
PRIOR YEAR	Note	Unrestricted Funds £	Restricted Funds £	Total 2020 £
Income				
Donations, legacies & similar income				
Donations		476	-	476
Grants receivable	2	-	66,050	66,050
Interest receivable		42	-	42
Training and events		12,024	-	12,024
Total Income		12,542	66,050	78,592
Expenditure				
Costs of raising funds	4	395	368	763
Charitable expenditure	5	18,350	32,779	51,129
Total Expenditure		18,745	33,147	51,892
Net (expenditure)/income and net movement in funds for the year		(6,203)	32,903	26,700
Transfers between funds		4,545	(4,545)	-
Total funds brought forward		6,399	19,303	25,702
Total funds carried forward		4,741	47,661	52,402

The Charity has no recognised gains and losses other than the results for the period as set out above.

BALANCE SHEET
AS AT 31ST MARCH 2021

	Note	2021 £	£	2020 £	£
CURRENT ASSETS					
Cash at bank and in hand		88,578		55,631	
Total Current Assets		<u>88,578</u>		<u>55,631</u>	
LIABILITIES					
Amounts falling due within one year	7	<u>1,046</u>		<u>3,229</u>	
NET CURRENT ASSETS			<u>87,532</u>		<u>52,402</u>
THE FUNDS OF THE CHARITY					
Unrestricted income funds	8		12,005		4,741
Restricted income funds	9		75,527		47,661
TOTAL CHARITY FUNDS			<u>87,532</u>		<u>52,402</u>

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31st March 2021.

The Trustees have not required the charitable company to obtain an audit of its financial statements for the year ended 31st March 2021 in accordance with Section 476 of the Companies Act 2006.

The Trustees acknowledge their responsibilities for:

- ensuring that the charitable company keeps accounting records which comply with Sections 386 and 387 of the Companies Act 2006 and
- preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its profit or loss for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

The financial statements have been prepared in accordance with the provisions of Part 15 of the Companies Act 2006 relating to small companies.

The financial statements were approved by the Trustees on15/12/2021.....and were signed by:

A Knipe

.....
A Knipe (Trustee)

STATEMENT OF CASH FLOWS
FOR THE YEAR ENDED 31ST MARCH 2021

	Note	2021 £	2020 £
Cash (used in)/provided by operating activities	10	32,926	24,706
Cash flows from investing activities:			
Interest income		21	42
Cash provided by investing activities		<u>21</u>	<u>42</u>
(Decrease)/increase in cash and cash equivalents in the year		32,947	24,748
Cash and cash equivalents at the beginning of the year		<u>55,631</u>	<u>30,883</u>
Cash and cash equivalents at the end of the year		<u>88,578</u>	<u>55,631</u>

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31ST MARCH 2021

1. ACCOUNTING POLICIES

a) Basis of preparation of Financial Statements

The financial statements have been prepared in accordance with the Accounting and Reporting by Charities: Statement of Recommended Practice: applicable to charities preparing their accounts in accordance with the Financial Reporting Standard in the United Kingdom and Republic of Ireland (FRS 102) (second edition) issued October 2019 (effective 1 January 2019) (Charities SORP FRS 102), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

b) Donations, grants and similar income

Donations and similar income are included in the year in which they are receivable, which is when the Charity becomes entitled to the income and there is reasonable assurance of receipt.

Grants have been included as income from activities in furtherance of the Charity's objects where these amount to a contract for services, but as donations where the money is given in response to an appeal or with greater freedom of use.

c) Recognition and allocation of expenditure

All expenditure is accounted for on an accruals basis and is recognised where there is a legal or constructive obligation to pay for expenditure. All costs have been classified under headings that aggregate all costs related to the category. Where costs cannot be directly attributed to particular headings, they have all been allocated to activities on a basis consistent with the use of the resources or based on an estimate of the time spent on those activities.

d) Fund accounting

Funds held by the Charity are either:

- Unrestricted general funds - these are funds which can be used with the charitable objects at the discretion of the Trustees.
- Designated funds - these are funds set aside by the Trustees out of unrestricted general funds or specific future purposes or projects. The use of funds for their designated purpose will remain at the discretion of the Trustees.
- Restricted funds - these are funds that can only be used for particular restricted purposes within the objects of the Charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purpose. Further explanation of the nature and purpose of each fund is included in the Notes to the Financial Statements.

2 GRANTS RECEIVABLE

	Unrestricted Funds £	Restricted Funds £	Total Funds 2021 £	Unrestricted Funds £	Restricted Funds £	Total Funds 2020 £
The Meadowbrook Trust	-	6,000	6,000	-	12,000	12,000
Paul Hamlyn Foundation	-	63,750	63,750	-	48,750	48,750
Joan Ainslie Charitable Trust	-	5,000	5,000	-	5,000	5,000
R Williams	-	-	-	-	300	300
	-	74,750	74,750	-	66,050	66,050

The Trust wishes to express its appreciation to the above bodies for their financial support.

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31ST MARCH 2021

3. STAFF COSTS

No remuneration was paid to any of the Trustees in the year. Expenses totalling £Nil (2020: £1281) were reimbursed to them in the year.

No member of staff received remuneration exceeding £60,000.

The staff costs were:

	Total 2021 £	Total 2020 £
Wages and salaries	28,121	25,726
Pensions	524	319
	<u>28,645</u>	<u>26,045</u>

The average weekly number of staff employed by the Charity during the year was 2 (2020: 2).

The key management personnel of the Charity comprise of the Trustees who are not remunerated.

4. COSTS OF RAISING FUNDS

	Unrestricted Funds £	Restricted Funds £	Total 2021 £	Unrestricted Funds £	Restricted Funds £	Total 2020 £
Office costs	21	-	21	317	50	367
Resources	42	-	42	78	318	396
	<u>63</u>	<u>0</u>	<u>63</u>	<u>395</u>	<u>368</u>	<u>763</u>

5. CHARITABLE EXPENDITURE

	Unrestricted Funds £	Restricted Funds £	Total 2021 £	Unrestricted Funds £	Restricted Funds £	Total 2020 £
Grants and provision of charitable services:						
Publicity and events	194	13	207	11,693	699	12,392
Travel bursaries & expenses	19	19	38	1,678	2,202	3,880
Wages and salaries	-	28,645	28,645	-	26,045	26,045
Office costs	-	-	-	-	1,487	1,487
Postage and phone	-	-	-	176	100	276
Computers and software	89	134	223	139	188	327
Support costs (see note 6)	2,557	10,068	12,625	4,664	2,058	6,722
	<u>2,859</u>	<u>38,879</u>	<u>41,738</u>	<u>18,350</u>	<u>32,779</u>	<u>51,129</u>

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31ST MARCH 2021

6. SUPPORT COSTS

	Unrestricted Funds	Restricted Funds	Total 2021	Unrestricted Funds	Restricted Funds	Total 2020
	£	£	£	£	£	£
Office costs	122	30	152	1,199	306	1,505
Accountancy and payroll fees	701	892	1,593	592	735	1,327
Legal and professional fees	-	-	-	153	-	153
Subs and registration fees	711	237	948	221	75	296
Insurance	607	-	607	302	-	302
Bank charges and interest	72	18	90	50	10	60
Conference costs	-	-	-	162	-	162
Computers and software	-	264	264	-	859	859
Consultants	300	8,550	8,850	540	-	540
Training	14	-	14	1,260	-	1,260
Sundry expenses	30	77	107	185	73	258
	2,557	10,068	12,625	4,664	2,058	6,722

7. LIABILITIES

	Total 2021	Total 2020
	£	£
Payroll	76	2,279
Other creditors and accruals	970	950
	1,046	3,229

8. UNRESTRICTED FUNDS

	Total 2021	Total 2020
	£	£
Balance of Unrestricted Charitable Funds	12,005	4,741

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31ST MARCH 2021

9. RESTRICTED FUNDS

- Current year

	Balance at 1 April 2020	Income	Expenditure	Transfers	Balance at 31 March 2021
	£	£	£	£	£
Paul Hamlyn Foundation Fund	33,865	63,750	(33,047)	-	64,568
The Meadowbrook Trust	13,542	6,000	(3,110)	(7,992)	8,440
Prevo Trust	241	-	-	-	241
Others (Freedom to Learn & R Williams)	13	-	-	(13)	-
Joan Ainslie	-	5,000	(2,722)	-	2,278
	47,661	74,750	(38,879)	(8,005)	75,527

- Prior year

	Balance at 1 April 2019	Income	Expenditure	Transfers	Balance at 31 March 2020
	£	£	£		£
Paul Hamlyn Foundation Fund	-	48,750	(14,885)	-	33,865
The Meadowbrook Trust	12,607	12,000	(3,977)	(7,085)	13,542
Prevo Trust	6,683	-	(6,442)	-	241
Others (Freedom to Learn & R Williams)	13	300	(300)	-	13
Joan Ainslie	-	5,000	(7,543)	2,543	-
	19,303	66,050	(33,147)	(4,545)	47,661

Main fund names

Purpose and restrictions

The Meadowbrook Trust	To provide travel bursaries to Sands School, Park School, Student Voice and other individuals to develop understanding of democratic education.
Paul Hamlyn Foundation Fund	To support the project Change Makers Lab: Developing Agency, Igniting Activism, Building Communities.
Prevo Trust	For network research and broader organisational development.
Joan Ainslie	To enhance the inclusivity and diversity of engagement with the Freedom to Learn Network.

The grants may only be used for the purpose agreed and may not be assigned to any other purpose without prior written approval from the grant providers.

10. RECONCILIATION OF NET MOVEMENT IN FUNDS TO NET CASH FLOW FROM OPERATING ACTIVITIES

	2021 £	2020 £
Net movement in funds	35,130	26,700
Deduct interest income shown in investing activities	(21)	(42)
Decrease/(increase) in debtors	-	302
Increase/(decrease) in creditors	(2183)	(2,254)
Net cash (used in)/provided by operating activities	32,926	24,706