

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31 DECEMBER 2024
FOR
THE ENGLISH ASSOCIATION**

Mark J Rees LLP Chartered Accountants
Granville Hall
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Leicester
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THE ENGLISH ASSOCIATION

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FOR THE YEAR ENDED 31 DECEMBER 2024

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THE ENGLISH ASSOCIATION

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024

The trustees present their report with the financial statements of the charity for the year ended 31 December 2024. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019) and the obligations of their Royal Charter.

OBJECTIVES AND ACTIVITIES

Objectives and aims

The objectives of the English Association are to benefit the public by promoting the knowledge and appreciation of the English language and its literatures and to foster good practice in its teaching and learning at all levels.

The Association has pursued and will pursue its objectives by any one or more of the methods set out below.

1. Affording opportunities for professional and other co-operation amongst all those interested in English language and literature.
2. Furthering the due recognition of English as an essential element in education at all levels and participating publicly in any national debate on the teaching of the subject at any level.
3. Providing a forum for the discussion of practice and principle in the teaching and learning of English in all sectors of education from primary to university level.
4. Encouraging and facilitating advanced study in English language and literature.
5. Holding conferences, lectures and other meetings to respond to the professional needs of teachers and lecturers in all educational areas and to further the objects of the Association.
6. Publishing a range of journals, books, papers and leaflets to promote the study and appreciation of English.
7. Forming local branches to carry out the objects of the Association.
8. Establishing relations with kindred bodies and co-operating with such bodies but only in furtherance of the objects of the Association.
9. Enrolling members, collecting subscriptions from members and donations from any person interested in the objects of the Association.
10. Engaging in any other activity which shall be conducive to the objects of the Association.

The Association reviews its aims, objectives and achievements each year and this report summarises activities and achievements during 2024. In undertaking the review, the trustees have paid due regard to guidance issued by the Charity Commission on public benefit in deciding what activities the Association should undertake.

The charitable status of the English Association substantially enhances its ability to pursue its aims for the public benefit in a number of ways:

- Publishing a broad range of journals, books and other materials to inform and enlighten all readers concerned with English language and its literatures, and to offer those in education at all levels a forum for sharing best practice.
- Organising conferences and other events to address the needs of students of all ages, education professionals and members of the public interested in an appreciation of the English language and its literatures.
- Offering prizes and awards to recognise and encourage creativity and achievement.
- Contributing to the public debate about the teaching of English at all levels.
- Promoting student recruitment to English courses in schools, colleges and universities.
- Collaborating with other bodies to further engagement with our literary and linguistic inheritance.
- Encouraging trustees and a large number of volunteers to give their time and expertise without charge in pursuance of the above.

THE ENGLISH ASSOCIATION

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024

OBJECTIVES AND ACTIVITIES

Activities and achievements during 2024

Publications

English is the flagship higher-education journal of the Association and is dedicated to new developments in English studies. Published four times per year by Oxford University Press on behalf of the Association, English provides a forum for discussion on all aspects of English literature and language, and on professional topics. It includes scholarly essays and reviews on all periods of literary history, alongside new work by contemporary poets. It publishes work that speaks to the discipline as a whole, including reflections on pedagogy and on the place of English literature and language in the world beyond academia. The journal is edited by a team based at the University of East Anglia, led by Dr Rebecca Pinner and Dr Will Rossiter.

The Use of English is the longest-standing of journals for teachers, including trainee teachers, of secondary and further English. Published three times a year, it brings together vigorous, independent comment on theory, policy and practice. It carries a substantial section of reviews of important books on the teaching of the subject, plus works of literary criticism and anthologies and editions. The journal is edited by Chris Green and Kayte Haselgrove.

English 4-11 supports literacy in the primary classroom and is for teachers, including trainee teachers, of primary English. Accessible and lively, the magazine is packed with articles, covering Early Years Education to the end of Key Stage 2. Published three times a year, the magazine includes accounts of innovative practice and successful projects, reports of classroom research, reviews of books, software and other resources, interviews with authors, and articles to spark discussion. It is a joint publication of the English Association, the National Association for the Teaching of English, and the United Kingdom Literacy Association and is edited by a joint Editorial Board, led by Dr Sally Wilkinson.

The English Association Newsletter encourages conversation about topics important to the subject community, and is published three times per year. It is edited by Dr Rebecca Fisher, the CEO of the English Association, in collaboration with guest editors.

Essays and Studies is a series of annual themed volumes, each edited by a distinguished academic. The series is published on behalf of the Association by Boydell & Brewer.

The Year's Work in English Studies is a qualitative narrative bibliographical review of scholarly work on English language and on literatures written in English. The volume includes a detailed overview from Old English to contemporary critical works for a given year and is published annually on behalf of the Association by Oxford University Press.

The Year's Work in Critical and Cultural Theory is a companion volume to The Year's Work in English Studies and is also published annually for the Association by Oxford University Press. It provides a narrative bibliography of work in the field of critical and cultural theory, recording significant debates and issues of interest in a broad field of research in the humanities and social sciences. The series is of interest to scholars working in many areas of literary and critical and cultural studies as well as in media, visual arts, history and political theory.

Issues in English is a series of occasional publications exploring current issues of debate in English at all levels.

English at the Interface is a series comprising one or two monographs annually, published on behalf of the Association by Liverpool University Press. Monographs can be on any field of English Studies - Literature and Language - from the mediaeval period to the present.

Bookmarks are a series of pamphlets intended to supplement the enthusiasm of the literature teacher and to provide additional independent resources for readers wanting to broaden their engagement with literature. They are downloadable free of charge from the Association's website.

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REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024

OBJECTIVES AND ACTIVITIES

The following were published during the year:

- English, Nos. 279 - 281, edited by Nonia Williams/Rebecca Pinner and Will Rossiter
- The Use of English, Volume 75 Nos. 2-3 and Volume 76 No. 1, edited by Malcolm Hebron/Kayte Haselgrove and Chris Green
- English 4-11, No. 80-82, edited by Sally Wilkinson
- Newsletter, Nos. 235 - 237, edited by Rebecca Fisher and Susie Nicklin (235), Tom F. Wright and Arlene Holmes Henderson (236), and Elizabeth Draper and Hollie Barnes-Lomax (237)
- Essays and Studies 2024, 'Literature and Institutions of Welfare', edited by Jess Cotton
- The Year's Work in English Studies Volume 103, edited by William Baker and Kenneth Womack
- The Year's Work in Critical and Cultural Theory Volume 32, edited by Emelia Quinn and Ranjan Ghosh
- English at the Interface, 'Proximities: Literature, Mobility and the Politics of Displacement' by John Culbert

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REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024

OBJECTIVES AND ACTIVITIES

Conferences, key meetings, and events

January	Meeting of the English 4-11 Editorial Board Event: Opening Doors to Ambitious English Event: Analysing Adaptations: a digital approach to introducing C19th texts for Y9 students
February	Meeting of the Primary and Early Years Education Committee Meeting of the Secondary and Further Education Committee Meeting of the Higher Education Committee Meeting of the Finance Committee Meeting of the Publications Committee CEO and Deputy Chair attended AQA discussion forum Meeting of the Common English Forum Event: Reading in the primary school: reading for empathy in the classroom Event: Speaking for English - Policy
March	Meeting of the Board of Trustees Meeting of the English 4-11 Editorial Board Event: Creative Writing and English: collaboration, crossovers, connection
April	Meeting of the Primary and Early Years Education Committee Meeting of the Secondary and Further Education Committee Meeting of the Higher Education Committee Meeting of the Finance Committee CEO presented with Connecting Maths and English working group at the Joint Mathematical Associations Conference CEO attended OCR discussion forum Event: What does it mean to have a diverse curriculum? Event: FE Gathering Voices
May	Winners of the English 4-11 Picture Book Awards announced Awards Ceremony and AGM held in Senate House Meeting of the Secondary and Further Education Committee Meeting of the Finance Committee Meeting of the Learned Societies network Event: The interface between trade publishing and creative writing in education Event: Opening Doors: stepping stones from KS2 to KS3/4
June	Meeting of the Board of Trustees Meeting of the Common English Forum #EnglishCreates campaign week Events: What is a reader anyway? Event: Reading Lessons: Carol Atherton and Bob Eaglestone in conversation Event: The Poetry By Heart 14+ timeline anthology Event: Building confidence with diverse text Event: FE Gathering Voices Event: Thinking Forwards: English and Neuroscience Event: Reading aloud in the primary classroom
July	CEO presented the Teacher Award at the Poetry By Heart Finals CEO keynote at the National English Teaching Leads conference Meeting of the Management Group Meeting of the Finance Group Meeting of the Finance Committee Event: Talking about human rights in the classroom

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REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024

OBJECTIVES AND ACTIVITIES

August	
September	Meeting of the English 4-11 Editorial Board Meeting of the Board of Trustees Event: FE Gathering Voices Event: Oracy education: perspectives from research, policy and practice Event: Developing a spoken language curriculumEvent: Opening Doors to richer English for teachers and pupils Event: Thinking Forwards - empathy, narrative and cultural values Event: AI for English students Event: Connecting poetry and maths for National Poetry Day
October	Meeting of the Finance Committee Meeting of the Fellowship Committee Event: Speaking Citizens, connecting communities conference Event: Opening Doors to ambitious English: a forum for new approaches conference Event: What does it mean to teach context in a English lesson? Event: FE Gathering Voices Event: PEYE summit Event: Writing for pleasure - teachers and children as writers and bookmakers Event: Diversifying text in English Event: Thinking Forwards: Challenge Labs
November	Meeting of the Higher Education Committee Meeting of the Primary and Early Years Education Committee Meeting of the Secondary and Further Education Committee Meeting of the Finance Committee Meeting of the Fellowship Committee CEO attended the OCR discussion forum Event: Action On...AI Event: Member briefing Event: Technology in the classroom: policy, practice, pedagogy Event: Thinking Forwards - Bee-ing Human
December	Meeting of the Board of Trustees CEF met with Department for Education English Curriculum Policy Team Event: What does it mean to have a diverse curriculum? II

Committee reports

Higher Education Committee

Members:

Jenny Richards	Chair (to April 2024) - Newcastle University/University of Cambridge
Joe Barber	Manchester Metropolitan University
Alex Thomson	University of Edinburgh
Antony Rowland	Manchester Metropolitan University
Claire Jowitt	University of East Anglia
Clare Lees	Institute of English Studies, School of Advanced Studies, University of London
Greg Walker	University of Edinburgh
Martin Halliwell	University of Leicester
Nicole King	University of London
Rick Rylance	School of Advanced Studies, University of London
Robert Eaglestone	Deputy Chair - Royal Holloway, University of London

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OBJECTIVES AND ACTIVITIES

Anshuman Mondal	University of East Anglia
Andrea Macrae	Oxford Brookes University
Katherine Baxter	Chair (from April 2024) - Northumbria University
Jerome de Groot	University of Manchester
Elsbeth Jajdelska	Strathclyde University
Suzy Joinson	Chichester University
Gail Marshall	University of Reading
Bronwen Price	Independent scholar
Lynda Pratt	University of Nottingham
Richard Stacey	Glasgow University
Nathan Waddell	University of Birmingham
John Wrighton	Kingston University

Highlight of activities:

- The Chair of the HEC, JR, met with new Director of REF in February 2024
- RRY stepped down from the HEC in April 2024
- AT stepped down from the HEC in February 2024
- JR stepped down as Chair of the HEC in April 2024, and was replaced by KB
- HEC welcomed the new leads for EA workstreams: (RE: lead for cross-sector educational policy; Cathy Shrank: lead for Skills for the Future of English; Tom F. Wright: Lead for Oracy)
- HEC continued to support the SUMS project, UE's #EnglishCreates campaign and the work of Decolonising the Discipline
- LP and JR continued to lead the Thinking Forwards programme
- CS has led the development of a suite of Skills for the Future English Flyers with HEC and SFEC
- The HEC, UE, and IES continued to provide support for departments under threat
- AR undertook a new state of the discipline survey and will share findings in April with members
- CS and RE met with Pearson (exam board) in May

Secondary and Further Education Committee

Members:

Elizabeth Draper	Chair (to November 2024) - independent consultant
Hollie Barnes Lomax	Deputy Chair - Cambridge Regional College
Joan Foley	University of the West of England/Open University
Tracey Maloney	Consultant
Brenda Marshall	Primary-Secondary Education Committee liaison
Sarah Mullin	Sunderland University
Angela Rodrigues	The Cotswold School
Joe Barber	Manchester Metropolitan University
Freddie Baveystock	Harris Westminster Sixth Form
Chris Green	Perse School Cambridge
Matt Carnaby	Chair (from November 2024) - Astrea Academy Trust
Ella Taylor	Harris Westminster Sixth Form
Jo Heathcote	English curriculum and assessment consultant
Kirsty Haughton	Nottingham College
Helen Thomson	Doctoral student and experienced teacher
Jo Hill	Treasurehouse London

Change in membership: The SFEC welcomed new members KHau, JHi and HT. Malcolm Hebon and Rob Penman stepped down.

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FOR THE YEAR ENDED 31 DECEMBER 2024

OBJECTIVES AND ACTIVITIES

Highlights of activities:

- ED stepped down as Chair in November 2024, and was succeeded by MC
- SFEC explored AQA's marking of English GCSEs.
- SFEC welcomed AQA to talk through proposed changes to GCSE English.
- SFEC interrogated the Ofqual marking report for comment.
- SFEC continues to look to provide support for teaching colleagues to understand proposed changes to assessment in English.
- SFEC conducted an expertise directory.
- Maths and English collaborative work - the SFEC continues to develop this work, supporting several events in 2024.
- Newsletter - Autumn 2024 issue on technology (Sept 2024) issue co-edited by chair and deputy chair, focus on Secondary and FE provision and a follow up online event.
- Use of English - co-editors on the committee and members continue to support, contribute and actively engage in increasing participation from teachers in Secondary and FE sectors.
- FE Gathering Voices - teach meet online series facilitated and developed by the deputy chair : planned and presented 30th April, June 18th on GCSE resit curriculum in FE settings; Oct 2024 on FE GCSE resits - collaborative approaches bringing FE teachers together.
- Oracy Commission - the SFEC Chair participated in the consultative process, bringing ideas from the SFEC - attended GCSE Roundtable in May 2024 with the Oracy Education Commission, supporting the launch in October 2024 at Westminster of the We Need To Talk report.
- Striking The Balance OCR 11-16 Curriculum and Assessment in England Review. Contributions from members of the committee; launch attended 3rd Sept 2024
- Speaking Citizens/connecting communities - the committee supported this work, including the event on October 7th 2024 at Europe House
- Exam Boards - Chair and CEO presented at OCR consortium Autumn Forum on the work of the EA and the SFEC; attended AQA consortium events
- GCSE reform - SFEC members contributed to the event on GCSE reform at the Globe on 25th Sept 2024
- Poetry By Heart - the SFEC continues to actively engage in this consortium, chair attends meetings
- London Association of the Teaching of English - member of the committee attended a conference/making links/representing the EA
- Data tracking contributions - new development in committee providing info/data on current trends on exam entries and results for GCSEs and A-levels to the EA data page in August 2024
- Collecting Case studies from English teachers to contribute to new development of Thinking Forwards from across the regions - eg Secondary school in Derby, Harrow, Richmond and Uxbridge Colleges, North Shields secondary school, Barking and Dagenham College of Further Education, Birmingham Sixth Form College - online sessions
- FE Literacy movement - the committee has supported the development of this movement, event in June 2024 at the University of Derby on the subject of 'literacy, English and the subject specialist teacher' attended by deputy chair of committee, movement effective in impact: the NLT annual literacy survey to be inclusive of those studying on vocational programmes, presented work at the Westminster Policy Forum. We now have Kirsty Haughton who is one of the founding members on the committee.

Primary and Early Years Education Committee

Members:

Kirstie Hewett	Chichester University - School Improvement Specialist
Sonia Carvell	Primary Teacher
Brenda Marshall	Primary-Secondary Education Committee liaison
Megan Dixon	Consultant
Jake Hope	Reading development & children's book consultant
Suzanne Hughes	Primary Teacher
Lorna Watson	Primary Teacher

Changes to membership: Nicky Potter, Rebecca Smith and Chris Brown stepped down from the Committee.

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OBJECTIVES AND ACTIVITIES

Highlights of activities:

- Member of the PEYEC continued to support the aim of generating interest in the work of the EA and attracting new members by leading a number of events as detailed on the events list.
- We contributed to the EA's drive to contribute to the public debate about the teaching of English by responding to changes in policy and practice (e.g. the Curriculum and Assessment Review Call for evidence, Ofsted's Telling the Story, the Primary Education Reform Summit and the changes to KS1 assessment).
- We began to establish smaller working groups in line with the different strands of the National Curriculum for English (2013) with a view to enabling us to be better positioned to respond in a timely way to relevant publications, to identify organisations whose vision and goals align with our own, and to provide effectively for our EA membership base. These will be bedded in over 2025 as we welcome several new members.
- We continued to hold a space in the monthly email so that EA members with a particular interest in the primary and early years phase receive regular communication.
- We represented the EA at the Festival of Education 2024 by chairing a panel on reading for pleasure for Love Reading 4 Kids.

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REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024

OBJECTIVES AND ACTIVITIES

Fellowships

The new Fellows of the English Association were honoured at the Awards Ceremony following the Annual General Meeting on 25 May 2024:

Anne Fine
Daljit Nagra
Rob Penman
Michael Schmidt
Rosario Arias
Joe Barber
Catherine Bates
Luisa Cale
Ivan Callus
Gerard Carruthers
David Cooper
James Corby
Stevie Davies
Emma Depledge
Thomas Duggett
Christine Ferguson
Frank Ferguson
Jo Heathcote
Lorna Huston
Darryl Jones
Lucy Jukes
Vassiliki Kolocotroni
Chris Laoutaris
Andrea Macrae
John McAuliffe
Sylvia Mieszkowski
Dafydd Moore
Joe Moshenska
Lisa Mullen
Marianne O'Doherty
Paul Poplawski
Ruth Robbins
Rachel Roberts
Jo Robinson
Molly Rosenberg
Jill Rudd
Sarah Satha
Michelle Sheehan
Lorna Smith
Tiago Sousa Garcia
Jane Stabler
Louise Sylvester
Paul Whickman

THE ENGLISH ASSOCIATION

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OBJECTIVES AND ACTIVITIES

Awards and prizes

The following were awarded at the Awards Ceremony on 25 May 2024:

The Betty Haigh Shakespeare Prize

Lara Solie-Tuluie, for her essay 'We Need Shakespeare Now More Than Ever: How She's The Man Sheds Light on The Relevance of Twelfth Night Today'

The Beatrice White Prize

Dr Kerstin Majewski, for her publication The Ruthwell Cross and its Texts: A New Reconstruction and an Edition of The Ruthwell Crucifixion Poem (De Gruyter, 2022)

Michael Murphy Memorial Poetry Prize

Jay Gao for his collection Imperium (Carcanet)

English 4-11 Picture Book Awards

Non-fiction 7-11

Brilliant Black British History by Atinuke and Kingsley Nebechi (Bloomsbury Children's Books)

Non-fiction 4-7

LIFESIZE Deadly Animals by Sophy Henn (Farshore)

Fiction 7-11

The Panda's Child by Jackie Morris and Cathy Fisher (Otter-Barry Books)

Fiction 4-7

Holey Moley by Bethan Clarke and Anders Frang (Little Tiger)

The Margaret Mallett Award for Children's Non-Fiction

Saving H'Non - Chang and the Elephant by Trang Nguyen and Jeet Zdung (Kingfisher)

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REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024

FINANCIAL REVIEW

Financial position

The statement of financial activities for the year ended 31 December 2024 shows a surplus of incoming resources over resources expended for the year of £148,379 (2023: £91,262). Both 2024 and 2023 were significantly impacted by a revaluation of the pension scheme resulting in a credit of £100,555 in 2024 and a credit of £20,508 in 2023, as detailed in note 7. The Association's total reserves increased during the year from £222,952 to £371,331. Cash at bank and in hand at the end of the year was £353,132 (2023: £284,405).

Risk management

Trustees have identified the major risks to which the Association is exposed and put in place mitigations and policies to manage and control risk. In the areas of operational, governance, financial and compliance risk, trustees are confident that the quality of the Association's staff and professional advisors minimises the exposure to risk.

Reserves policy

The balance sheet at 31 December 2024 shows unrestricted reserves of £370,182. Restricted reserves relating to the various prize funds amount to £1,149. The Association's reserves therefore stood at £371,331 on 31 December 2024.

The unrestricted fund includes tangible assets, debtors, cash in the bank and in hand.

It is the Association's policy to try to maintain reserves equivalent to six months' estimated expenditure, together with monies sufficient to protect the EA from identified future operational risks such as volatility arising from the revaluation of the Universities Superannuation Scheme (USS) and the effect on the Association's income from potential developments in the publication industry.

In addition, under its arrangements with the University of London the Association is required to hold reserves of no less than £50,000 in respect of the membership of the Association's employees in the USS.

Therefore, members of council have resolved to target reserves of not less than £350,000 to ensure the continuing operation of the Association, including contractual commitments to its employees and to publishers, during any periods of economic uncertainty.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust and constitutes a charitable company, incorporated by Royal Charter.

THE ENGLISH ASSOCIATION

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024

STRUCTURE, GOVERNANCE AND MANAGEMENT

Organisational structure

The management of the Association is carried out by the Board of Trustees, whose members are the council of the Royal Charter entity and trustees of the registered charity. Trustees give their time to the Association voluntarily and receive no benefits for the work they do on its behalf. Expenses reclaimed by trustees for their attendance at meetings of the Association are set out in a note to the accounts.

The Finance Committee is responsible for the financial and administrative operations of the Association, including risk management, and reports directly to the Board of Trustees.

The Secondary and Further Education Committee reports to the Board of Trustees and is responsible for and responding to national issues regarding secondary and further education; the committee also advises the editors of The Use of English.

The Primary and Early Years Education Committee reports to the Board of Trustees and is responsible for responding to national issues regarding primary education; the English 4-11 Editorial Board is responsible for editing English 4-11 and administering the annual English 4-11 Picture Book awards.

The Higher Education Committee responds to national issues regarding higher education and reports to the Board of Trustees.

The Fellowship Committee is responsible for all matters pertaining to the Fellowship and its special interest groups, and reports to the Board of Trustees.

The Publications Committee is responsible for the publications portfolio.

In 2024 the Association was staffed as follows:

Chief Executive Officer, 0.8 FTE (1.0 FTE from July 2024)

Administration Officer, 0.5 FTE (1.0 FTE in Jan, Feb, Nov, and Dec)

Finance Officer, 0.4 FTE

History of The English Association

The English Association was founded in 1906. On 1 January 2001 its activities, assets and liabilities were transferred to a newly incorporated company limited by guarantee, in accordance with a scheme approved by the Charity Commission. On 1 December 2006 the Association was incorporated by Royal Charter.

In accordance with an order of the Charity Commission, on 1 January 2009 all of the activities, assets and liabilities of the existing registered charity (number 1078935) were transferred to a new registered charity (number 1124890). This transfer was necessary following the incorporation of the Association by Royal Charter. From 1 January 2009 the Association ceased to transact its affairs through the medium of the company limited by guarantee and from that date the affairs of the Association have been carried out through the new registered charity and the entity incorporated by Royal Charter. During 2010 the old registered charity was dissolved and the company limited by guarantee was removed from the Register of Companies.

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REFERENCE AND ADMINISTRATIVE DETAILS

Registered Company number

RC000811 (England and Wales)

Registered Charity number

1124890

Principle address

Senate House

Malet Street

London

WC1E 7HU

Trustees

Prof G Walker

Prof P Shaw (stepped down May 2024)

Prof M Halliwell

R Penman (stepped down May 2024)

S Nicklin (stepped down May 2024)

Prof D Duff

Dr N King

E Draper

L Lamb (stepped down May 2024)

T Maloney

Dr F M Douglas

Prof A J P Thomson

Prof A Mondal

Dr R Fisher is the Charity's Chief Executive Office.

Independent Examiner

Phillip Bott FCA BSc (Hons)

The Institute of Chartered Accountants

Mark J Rees LLP Chartered Accountants

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Leeds

LS1 9TY

THE ENGLISH ASSOCIATION

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2024**

Approved by order of the board of trustees on25 April 2025..... and signed on its behalf by:



.....
Prof D Duff - Trustee

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
THE ENGLISH ASSOCIATION**

Independent examiner's report to the trustees of The English Association

I report to the charity trustees on my examination of the accounts of The English Association (the Trust) for the year ended 31 December 2024.

Responsibilities and basis of report

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 Act and in carrying out my examination I have followed all 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by Section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

Use of our report

This report is made solely to the charity's members. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and the charity's members as a body, for our work, for this report, or for the opinions we have formed.

Phillip Bott FCA BSc (Hons)
The Institute of Chartered Accountants
Mark J Rees LLP Chartered Accountants
Granville Hall
Granville Road
Leicester
Leicestershire
LE1 7RU

Date:

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STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 DECEMBER 2024

	Notes	Unrestricted fund £	Restricted funds £	2024 Total funds £	2023 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies	2	1,826	-	1,826	963
Charitable activities	4				
Advancing English		225,701	-	225,701	237,092
Investment income	3	3,185	-	3,185	2,117
Total		<u>230,712</u>	<u>-</u>	<u>230,712</u>	<u>240,172</u>
EXPENDITURE ON					
Charitable activities	5				
Advancing English		<u>82,293</u>	<u>40</u>	<u>82,333</u>	<u>148,910</u>
NET INCOME/(EXPENDITURE)		148,419	(40)	148,379	91,262
RECONCILIATION OF FUNDS					
Total funds brought forward		<u>221,763</u>	<u>1,189</u>	<u>222,952</u>	<u>131,690</u>
TOTAL FUNDS CARRIED FORWARD		<u><u>370,182</u></u>	<u><u>1,149</u></u>	<u><u>371,331</u></u>	<u><u>222,952</u></u>

The notes form part of these financial statements

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BALANCE SHEET 31 DECEMBER 2024

	Notes	Unrestricted fund £	Restricted funds £	2024 Total funds £	2023 Total funds £
FIXED ASSETS					
Tangible assets	9	1,200	-	1,200	399
CURRENT ASSETS					
Debtors	10	48,801	-	48,801	56,141
Cash at bank and in hand		351,783	1,349	353,132	284,405
		<u>400,584</u>	<u>1,349</u>	<u>401,933</u>	<u>340,546</u>
CREDITORS					
Amounts falling due within one year	11	(31,602)	(200)	(31,802)	(17,273)
NET CURRENT ASSETS		<u>368,982</u>	<u>1,149</u>	<u>370,131</u>	<u>323,273</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>370,182</u>	<u>1,149</u>	<u>371,331</u>	<u>323,672</u>
NET ASSETS		<u>370,182</u>	<u>1,149</u>	<u>371,331</u>	<u>222,952</u>
FUNDS	12				
Unrestricted funds				370,182	221,763
Restricted funds				1,149	1,189
TOTAL FUNDS				<u>371,331</u>	<u>222,952</u>

The financial statements were approved by the Board of Trustees and authorised for issue on
.....25.April.2025..... and were signed on its behalf by:



.....
Prof D Duff - Trustee

The notes form part of these financial statements

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2024

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011 and its Royal Charter. The financial statements have been prepared under the historical cost convention.

Financial reporting standard 102 - reduced disclosure exemptions

The charity has taken advantage of the following disclosure exemption in preparing these financial statements, as permitted by FRS 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland':

- the requirements of Section 7 Statement of Cash Flows.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably. The exception to this is Subscription and Publication income which is recognised in the period to which it relates.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Fixtures and fittings	- 5% on cost
Office equipment	- 20% on cost
Computer equipment	- 33% on cost

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds 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 purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

Pension costs and other post-retirement benefits

The charity operates both a defined contribution scheme and a defined benefit scheme.

Defined contribution scheme: Contributions payable to the charity's pension scheme are charged to the statement of financial activities in the period to which they relate.

THE ENGLISH ASSOCIATION

NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 DECEMBER 2024

1. ACCOUNTING POLICIES - continued

Pension costs and other post-retirement benefits

Defined benefit scheme: An actuarial valuation of the scheme is carried out by an independent professionally qualified actuary every three years.

Debtors

Short term debtors are measured at transaction price, less any impairment. Loans receivable are measured initially at fair value, net of transaction costs, and are measured subsequently at amortised cost using the effective interest method, less any impairment.

Creditors

Short term creditors are measured at the transaction price. Other financial liabilities, including bank loans, are measured initially at fair value, net of transaction costs, and are measured subsequently at amortised cost using the effective interest method.

2. DONATIONS AND LEGACIES

	2024	2023
	£	£
Gifts	<u>1,826</u>	<u>963</u>

3. INVESTMENT INCOME

	2024	2023
	£	£
Deposit account interest	<u>3,185</u>	<u>2,117</u>

4. INCOME FROM CHARITABLE ACTIVITIES

	Activity	2024	2023
		£	£
Subscriptions	Advancing English	96,513	92,552
Publications	Advancing English	119,574	139,934
Conference Income	Advancing English	-	2,206
Other	Advancing English	9,614	2,400
		<u>225,701</u>	<u>237,092</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2024

5. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs £	Totals £
Advancing English	<u>45,600</u>	<u>36,733</u>	<u>82,333</u>

6. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 December 2024 nor for the year ended 31 December 2023.

Trustees' expenses

There were trustees expenses of £1,260 (2023: £2,759) paid for the year ended 31 December 2024.

7. STAFF COSTS

	2024 £	2023 £
Wages and salaries	80,871	75,137
Social security costs	6,733	5,776
Other pension costs	(90,558)	(6,973)
	<u>(2,954)</u>	<u>73,940</u>

There was no remuneration or other benefits paid to the Key Management Personnel during the year ended 31 December 2024 nor for the year ended 31 December 2023.

The average monthly number of employees during the year was as follows:

	2024	2023
Charitable activities	<u>3</u>	<u>3</u>

No employees received emoluments in excess of £60,000 in the year ended 31 December 2024 nor in the year ended 31 December 2023.

Pension costs

The total pension credit to the profit and loss account was £100,720 (2023: £20,508).

Previously The English Association operated on the basis that all staff are in academic and comparable roles and as such were enrolled in to the USS pension scheme. As at 25 November 2019, the charity proposed a change in agreement with USS to offer an alternative pension scheme whereby only employees in grade 6 and above will be classed as academic and comparable and therefore future employees in grade 5 and below are no longer eligible for USS membership and will be enrolled in an alternative scheme. There is currently one employee enrolled in NEST.

A deficit recovery plan was put in place as part of the 2020 valuation, which required payment of 6.2% of salaries over the period 1 April 2022 until 31 March 2024, at which point the rate would increase to 6.3%. No deficit recovery plan was required under the 2023 valuation because the scheme was in surplus on a technical provisions basis. The institution was no longer required to make deficit recovery contributions from 1 January 2024 and accordingly released the outstanding provision to the profit and loss account.

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2024**

7. STAFF COSTS - continued

The latest available complete actuarial valuation of the Retirement Income Builder from USS is at 31 March 2023 (the valuation date), which was carried out using the projected unit method.

Since the institution cannot identify its share of USS Retirement Income Builder assets and liabilities, the following disclosures reflect those relevant for those assets and liabilities as a whole.

The 2023 valuation was the seventh valuation for the scheme under the scheme-specific funding regime introduced by the Pensions Act 2004, which requires schemes to have sufficient and appropriate assets to cover their technical provisions (the statutory funding objective). At the valuation date, the value of the assets of the scheme was £73.1 billion and the value of the scheme's technical provisions was £65.7 billion indicating a surplus of £7.4 billion and a funding ratio of 111%.

As the scheme was in surplus as at 31 March 2023, the pension commitments as at 31 December 2024 show a decrease in comparison to 31 December 2023 with a £100,720 change in expected contributions.

8. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES - 31 DECEMBER 2023

	Unrestricted fund £	Restricted funds £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	963	-	963
Charitable activities			
Advancing English	237,092	-	237,092
Investment income	2,117	-	2,117
Total	<u>240,172</u>	<u>-</u>	<u>240,172</u>
EXPENDITURE ON			
Charitable activities			
Advancing English	<u>148,790</u>	<u>120</u>	<u>148,910</u>
NET INCOME/(EXPENDITURE)	91,382	(120)	91,262
RECONCILIATION OF FUNDS			
Total funds brought forward	130,381	1,309	131,690
TOTAL FUNDS CARRIED FORWARD	<u>221,763</u>	<u>1,189</u>	<u>222,952</u>

THE ENGLISH ASSOCIATION

NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 DECEMBER 2024

9. TANGIBLE FIXED ASSETS

	Fixtures and fittings £	Office equipment £	Computer equipment £	Totals £
COST				
At 1 January 2024	2,597	3,572	50,837	57,006
Additions	-	-	1,299	1,299
At 31 December 2024	2,597	3,572	52,136	58,305
DEPRECIATION				
At 1 January 2024	2,322	3,448	50,837	56,607
Charge for year	21	48	429	498
At 31 December 2024	2,343	3,496	51,266	57,105
NET BOOK VALUE				
At 31 December 2024	254	76	870	1,200
At 31 December 2023	275	124	-	399

10. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2024 £	2023 £
Trade debtors	2,303	-
Prepayments and accrued income	46,498	56,141
	48,801	56,141

11. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2024 £	2023 £
Trade creditors	8,014	6,334
Other creditors	23,788	10,939
	31,802	17,273

THE ENGLISH ASSOCIATION

NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 DECEMBER 2024

12. MOVEMENT IN FUNDS

	At 1.1.24 £	Net movement in funds £	At 31.12.24 £
Unrestricted funds			
General fund	221,763	148,419	370,182
Restricted funds			
Beatrice White fund	1,099	-	1,099
Betty Haigh prize fund	90	(40)	50
	<u>1,189</u>	<u>(40)</u>	<u>1,149</u>
TOTAL FUNDS	<u>222,952</u>	<u>148,379</u>	<u>371,331</u>

Net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	230,712	(82,293)	148,419
Restricted funds			
Betty Haigh prize fund	-	(40)	(40)
	<u>230,712</u>	<u>(82,333)</u>	<u>148,379</u>
TOTAL FUNDS	<u>230,712</u>	<u>(82,333)</u>	<u>148,379</u>

Comparatives for movement in funds

	At 1.1.23 £	Net movement in funds £	At 31.12.23 £
Unrestricted funds			
General fund	130,381	91,382	221,763
Restricted funds			
Beatrice White fund	1,199	(100)	1,099
Betty Haigh prize fund	110	(20)	90
	<u>1,309</u>	<u>(120)</u>	<u>1,189</u>
TOTAL FUNDS	<u>131,690</u>	<u>91,262</u>	<u>222,952</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2024

12. MOVEMENT IN FUNDS - continued

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	240,172	(148,790)	91,382
Restricted funds			
Beatrice White fund	-	(100)	(100)
Betty Haigh prize fund	-	(20)	(20)
	<u>-</u>	<u>(120)</u>	<u>(120)</u>
TOTAL FUNDS	<u>240,172</u>	<u>(148,910)</u>	<u>91,262</u>

PROFESSOR BEATRICE WHITE PRIZE FUND

The Professor Beatrice White Fund was established in 1988. The annual prize of £100 is awarded to the outstanding scholarly article in the field of English Literature before 1590, noted in the current volume of The Year's Work in English Studies.

As of 31 December 2024 £200 (2023: £200) of prizes were unpaid relating to the years 2018 and 2019.

BETTY HAIGH FUND

The Betty Haigh Fund was established in 1996 and is used to finance the Betty Haigh Shakespeare Prize Competition, an essay competition open to all A Level students of English Literature.

13. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 December 2024.

THE ENGLISH ASSOCIATION

DETAILED STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 DECEMBER 2024

	2024 £	2023 £
INCOME AND ENDOWMENTS		
Donations and legacies		
Gifts	1,826	963
Investment income		
Deposit account interest	3,185	2,117
Charitable activities		
Subscriptions	96,513	92,552
Publications	119,574	139,934
Conference Income	-	2,206
Other	9,614	2,400
	225,701	237,092
Total incoming resources	230,712	240,172
EXPENDITURE		
Charitable activities		
Wages	80,871	75,137
Social security	6,733	5,776
Pensions	(90,558)	(6,973)
Publication costs	34,239	35,093
Events	12,790	1,929
Prizes and awards	1,525	1,434
	45,600	112,396
Support costs		
Management		
Office costs	18,526	18,721
Marketing	6,396	691
Events	421	1,664
Meeting expenses	548	156
Office equipment depreciation	69	69
Computer equipment	429	231
	26,389	21,532
Finance		
Bank charges	95	47
Card processing charges	747	586
Bookkeeping	3,700	3,879
	4,542	4,512

This page does not form part of the statutory financial statements

THE ENGLISH ASSOCIATION

DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2024

	2024	2023
	£	£
Finance		
Governance costs		
Legal and compliance fees	432	380
Consultancy and advice	2,580	7,384
Independent examiners remuneration	2,790	2,706
	<u>5,802</u>	<u>10,470</u>
Total resources expended	<u>82,333</u>	<u>148,910</u>
Net income	<u><u>148,379</u></u>	<u><u>91,262</u></u>

This page does not form part of the statutory financial statements