

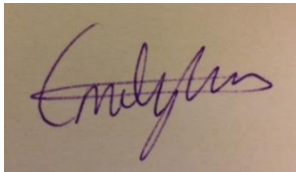
# Zoe Sarojini Education Trust

## Annual Report for 2020

April 2021

This report was written by the trustees of the Zoe Sarojini Education Trust and approved by them.

Signed:



Emily Young  
Chair of the Trustees

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## ***1. Reference and Administrative Details***

**a) Name of the Charity:** Zoe Sarojini Education Trust

**b) Charity registration number:** 1135609

**c) Address:** 88 Hamilton Road, Reading RG1 5RD

**d) Trustees:**

Dorothy Schwarz (since February 2010)

Tanya Murphy (since February 2010)

Laura Burch Schwarz (since September 2011)

Emily Young (formerly Hogge) (since September 2011) - **Chair**

## ***2. Structure Governance and management***

### **a. Nature of the governing document**

We have a Trust Deed, dated the 1<sup>st</sup> February 2010.

### **b. Recruitment of trustees**

Trustees are recruited because of their interest in the work and mission of the charity and their specific skills.

### **c. Training of trustees**

Trustees are invited to read the relevant documents pertaining to the role of trustees that the Charity Commission publishes. They are also inducted in the operations and requirements of the charity.

### **d. Organisational structure**

Decisions are taken by consensus by the trustees. Strategic decisions are made during meetings (face to face or over Skype) and operational decisions are taken by sub-groups of trustees during phone conversations and conference calls.

## ***3. Financial Review***

The year 2020 has been another successful year for the Trust. We raised £ 43,608 and donated £ 38,423. Our costs for the year were £ 1,286 for governance and

expenses incurred for a fundraising event.

The Table below shows how our money was spent:

<b>Fund name</b>	<b>Balances 1 Jan 2020 (£)</b>	<b>Incoming resources (£)</b>	<b>Outgoing resources (£)</b>	<b>Transfers btw funds (£)</b>	<b>Balances 31 Dec 2020 (£)</b>
Khethani	9,473	13,973	- 10,670	-	12,776
Zisize	-	240	- 825	585	-
Enrichment	487	3,389	- 5,312	1,436	0
Cape Town	201	7,696	- 2,705	-	5,193
Refugee Fund	389	3,024	- 3,944	531	- 0
Misty Meadows	-	13,323	- 14,967	1,644	-
University Fund	2,168	680	-	-	2,848
<b>Total Restricted</b>	<b>12,718</b>	<b>42,325</b>	<b>-38,423</b>	<b>4,196</b>	<b>20,816</b>
Endowment	1,000	-	-	-	1,000
Unrestricted funds	13,750	1,283	- 1,286	- 4,196	9,551
<b>Total funds</b>	<b>27,468</b>	<b>43,608</b>	<b>-39,709</b>	<b>0</b>	<b>31,367</b>

We donated £10,670 for the education of 8 children who go to Khethani School in Ingwavuma, including school fees, uniforms and extra-curricular activities.

We donated £825 for the 3 orphanage children's education we support through Zisize Education Trust.

We donated £5,312 to the Umndeni Wabantwana children's home for specialised education of our 4 sponsored children, including music lessons, and for assistance towards the general education of the 8 other children there.

We donated £2,705 for the education, transport, stationery, uniforms and textbooks for 4 children in Cape Town.

We donated £3,944 for the establishment of a resource centre for young people who are asylum seekers in Chios, Greece.

We donated £14,967 for Misty Meadows School, Howick and for the educational costs of 3 children there, ongoing costs of the computer centre and maker space, as well as the costs of a teacher.

Our reserves of £7,000 represent approx. 20 % of our regular outgoings.

Please see our Financial Accounts, available on the Charity Commission's website for further details of the Trust's finances in 2020.

## **Unrestricted Fund and policy on Reserves**

This fund is broken down as follows:

Designated as reserves:	£ 7,000
Available for spending during 2020:	£ 2,551
Total:	£ 9,551

The Trust holds a reserve of £ 7,000. This sum is equivalent to approx 20% of our regular outgoings. It aims to cover sponsorship for our children should donors unexpectedly quit at short notice while new sponsors are found.

## ***4. Public benefit Statement***

The trustees have complied with the duty in section 17 of the Charities Act 2011 to have due regard to public benefit guidance published by the Commission.

We benefit the public through our objective of promoting the education of children in South Africa and elsewhere. Specifically, we support children to attend quality schools and fund the associated costs as required, such as school fees, uniforms, stationery and transport to school. We also enhance the education of the children we sponsor by ensuring as far as possible adequate living conditions for them.

## ***5. Objectives and activities***

### ***a. Charity Objectives (governing document)***

The Objectives of our charity, as set out in the Governing Document are:

For the public benefit to promote the education of people under the age of 30 years worldwide in such ways as the charity trustees think fit, including by:

1. Awarding to such persons scholarships, maintenance allowances or grants tenable at any school, university, college or institution of education;
2. Providing their education (including the study of music or other arts), to undertake travel in furtherance of that education or to prepare for entry to any occupation, trade or profession on leaving any educational establishment.

## **b. Charity Aims**

The Zoë Sarojini Education Trust's purpose is to help children, particularly girls, living in poverty to go to school. The Trust was set up in memory of Zoë Sarojini Schwarz, a loved and loving young woman who suffered from bipolar depression and took her own life in August 2000.

### **Overall Aim One: Support the education of individual children in need**

The Trust enables donors, singly or in small groups, to fund the education of individual youngsters. We work through trusted and experienced volunteers in the Cape Town and Kwazulu-Natal regions of South Africa who help us select the most suitable youngsters to be funded, channel the funds directly to the relevant schools and colleges, and act as mentors to the youngsters. The children and young people we help are chosen according to local need and opportunity, with no preconceived criteria.

In addition to covering school fees, the Trust aims to ensure its sponsored children have their basic needs for shelter and food met.

The Trust also aims to fund enrichment extra-curricular activities for its sponsored children.

Finally, the Trust aims to facilitate communication between children and sponsors. If sponsors wish to, they and their families can maintain on-going personal contact with the young people they are sponsoring in order to encourage them, monitor their progress, mentor them and form long-term relationships.

### **Overall Aim Two: Support and strengthen innovative education models**

The Zoe Sarojini Education Trust aims to work closely with a small number of education partners that it deems provide powerful innovative education models to enable quality education for disadvantaged young people.

## **6. Achievement and performance**

Our tenth year has passed, our donors have remained loyal and steadfast, and the stories and progress reports streaming into the Trust are extremely pleasing. Our aims, to give our individual children the chance to a good education and thus a brighter future and continue to support our educational partners are well and truly on track.

We set out below our achievements in 2020 against the aims stated above.

### **Aim 1: Support the education of individual children in need**

#### **1. Supporting children to go to good schools**

In 2020, we supported 21 individual children to go to quality schools/ universities in South Africa. The children range in age from 10 to 22.

##### **Ingwavuma, Kwazulu Natal**

Five children went to Khethani Christian School in Ingwavuma, in Kwazulu Natal. They were selected by a local charity Zisize (see [www.zisize.org](http://www.zisize.org)). Two children went to a local high school, their pastoral and extra educational needs were supported by Khethani Christian School. Two children attended Richards Bay Christian School staying in a hostel with other children from Ingwavuma. One child attended the University of Pretoria where she studied Education.

Eight of these children are local children whose parents cannot afford school fees due to a lack of work or poorly paid work. Three live in the Zisize-run orphanage.

Four children are adopted children of Michelle and Neil Coetzee, who have set up the Umndeni Wabantwana children's home for their twelve adopted children. These children were home schooled by Michelle Coetzee this year.

##### **Cape Town**

Four children went to school in Cape Town. These children live in Cape Town townships. Their families are hard-working but cannot afford the school fees of schools that provide a vastly superior education to the township education they received previously.

##### **Howick, Kwazulu Natal**

This year we continued to support three children at Misty Meadows School, Howick. These children come from loving and hard-working families however they cannot afford to send their children to Misty Meadows. They live either on the farm or in the local township.

#### **2. Ensure basic needs in shelter and food are met**

The Zisize-run orphanage which the Zoe Trust helped to build remains a loving and caring home for 18 children including three Zoe Trust children. The home provides food and shelter as well as emotional and educational support.

Our Enrichment fund enabled us to support the data costs for two of our children who live here during the covid pandemic.. We were also able to support the child who attended Richards Bay Christian School with uniform, textbook, electrical and boarding costs.

### **3. Contributing to the enrichment of our children's education**

The money for our Enrichment Fund is raised through monthly donations and one-off fundraising events throughout the year. The money is spent on projects that are put forward to the trust by our mentors in South Africa who work alongside our children.

This extra level of care is what makes the Zoe Trust unique as it allows us to provide all round care for our children giving them the best possible chance to succeed.

Besides providing stationery, transport, uniforms and textbooks for our children, we have managed to continue to pay for some of our children to attend extra maths and economics lessons at Khethani. This not only helps them improve their academic results but it provides them with a safe space to study and a supportive role model to guide them both educationally and pastorally.

Our main enrichment cost this year has been the provision of data during the covid pandemic as well as food parcels and vouchers to support our children both in to stay safe and also in their education. All of our children have spent time away from school due to the pandemic and the data packages we have provided have allowed them to keep learning in line with their peers albeit that through a mobile phone or friend/community device.

This year we have also used our Enrichment Fund (alongside funds raised through fundraising initiatives) to continue to support a workshop space at Misty Meadows. The aim of the space is to provide the children with practical experience in woodwork, electrical engineering and elements of mechanical engineering.

In addition, this year we have paid for our three children at Misty Meadows to access extra curricular activities including taekwondo and gymnastics. These opportunities allow them to develop key skill such as resilience and determination as well as giving them a chance to explore skills that they have away from the classroom.

### **4. Enabling access to the internet and IT learning**

This year we continued to support computer programmes at Misty Meadows providing continued internet access. We added to this by buying one of our families an ipad at the height of the covid crisis so that they could access the online learning being provided, keep in contact with teachers and continue to learn through online



books / websites and activities. We also continued to provide learning materials and links found and created by trustee Emily.

## **5. Communication between sponsors and children**

Child sponsor correspondence has continued in 2020. Several sponsors and children wrote to each other this year whether via text or email. In addition, we received termly updates from our children via our mentors. As trustees, we are in constant communication with our sponsors which allows us to keep up to date with our children's progress and react to emergencies as and when they arise.

Our mentors on the ground tell us that our children are overjoyed and greatly encouraged by this communication. Sponsors too give us extremely positive feedback.

## **AIM 2 : Support and strengthen innovative education models**

The trust works with three carefully-vetted and trusted education providers, providing both tangible funding and capacity building as required.

### **Action for Education (Greece)**

The Zoe Trust works with UK-registered NGO Action for Education to strengthen its capacity to support the education needs of asylum seeker young people in Greece.

This year, we helped launch a co-working digital space for refugees on the island of Chios, Aegean by contributing for the purchase of second-hand computers and other essential materials.

### **Misty Meadows School (South Africa)**

We are now in our sixth year of partnership with Misty Meadows School.

Although we were unable to visit Misty Meadows this year due to the covid pandemic, we have maintained constant communication with Cassie, the head teacher of the school, so that we can support her with her continued work.

We were also successful in a 2-year funding application to Their World, who awarded the Trust £7,500 per year to pay for an additional teacher at Misty Meadows.

### **Khethani School (South Africa)**

We are in our sixth year of partnership with Khethani Christian School.

Although we were unable to visit Khethani this year due to the covid pandemic, we have maintained constant communication with Sylvia, the head teacher of the school, so that we can support her with her continued work.

## ***7. Raising Funds in 2020***

### **Regular donors**

In 2020, we maintained regular contact with our 71 regular donors. We sent out regular newsletters and updated Facebook, Twitter and our website. In addition, each sponsor received updates on their child's progress.

Our Facebook and twitter pages are updated with pictures and messages from trustees, mentors, sponsors and our children directly. It has provided a fast and visual way for our sponsors and children to connect.

### **One-off events and donations**

Beside our regular donations, one-off events and individual donations helped us to fund extra school related costs. This year we held a Zoe Trust party in London to raise money for two of our children to attend Richards Bay Christian School. We raised over £4,000 at this event (on top of our expenses) which allowed us to cover their hostel, uniform, textbook and enrichment costs. We were also successful in a funding bid to Their World charity (£15,000 over 2 years) to pay for an additional teacher at Misty Meadows School.

## ***8. Conclusion***

This year has been a difficult one around the world and charities have found it hard as countries enter into recession and individuals around the world face loss and financial strain. As a trust, we have been incredibly fortunate that our sponsors have remained constant and committed. We are also very grateful that despite the pandemic affecting our children's education all of our families in South Africa have remained safe.

Unfortunately, we said goodbye to Hannah Webb as a trustee this year as she moved on to different projects. We will miss her and wish her well. This year we have continued to have virtually no administrative costs.

We were very lucky to celebrate together as a Zoe Trust family in February 2020,

before the pandemic hit, when we held our second Zoe Trust party. This was well attended by current sponsors and new friends / family. It was brilliant to see everyone, to share our key messages and to raise over £4,000 for the trust.

The combined effect of the Enrichment Fund and the communication from our sponsors is apparent. Through attention to detail we are able to provide our children with the love and support they need not just to do well at school but to thrive. Our children are developing into kind, successful and determined individuals. This is especially evidenced by our children's success and continued determination to learn this year despite everything that has been thrown at them. We have been so impressed with how hard they have worked, how committed they have been to accessing learning and how well they have returned to school once they reopened. Our two children who moved to Richards Bay this year to attend Richards Bay Christian School are also testament to how well our children are doing as they have made the transition seamlessly, adapting to online learning, accessing emails and life at a big city private school confidently and successfully.

Overall, 2020 has been a year of support and consolidation as we have attempted to keep all our children safe and in education throughout this pandemic which continues to impact our learners around the world. We are delighted that after a late start all our children are now back at school and able to receive the quality education they deserve. We will continue to monitor the situation throughout the year, responding as and when needed.

# **ZOE SAROJINI EDUCATION TRUST**

**YEAR ENDED 31ST DECEMBER 2020**

## **CONTENTS OF FINANCIAL STATEMENTS**

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**ZOE SAROJINI EDUCATION TRUST****YEAR ENDED 31ST DECEMBER 2020****STATEMENT OF RECEIPTS AND PAYMENTS ACCOUNT**

	Notes	Unrestricted Funds	Restricted Funds	Endowment Funds	2020	2019
		£	£	£	£	£
<b>INCOMING RESOURCES</b>						
Voluntary Income		1,283	42,325	-	43,608	35,266
<b>TOTAL</b>		<b>1,283</b>	<b>42,325</b>	<b>-</b>	<b>43,608</b>	<b>35,266</b>
<b>RESOURCES EXPENSED</b>						
Charitable Activities		-	38,423	-	38,423	36,891
Costs of Generating Voluntary Income	3	1,201	-	-	1,201	119
Governance	4	85	-	-	85	100
<b>TOTAL</b>		<b>1,286</b>	<b>38,423</b>	<b>-</b>	<b>39,709</b>	<b>37,110</b>
<b>NET MOVEMENT IN FUNDS</b>						
		-	3	3,902	-	1,844
BALANCES B/FWD 1 JANUARY		13,750	12,718	1,000	27,468	29,312
Transfers between Funds		-	4,196	-	-	-
<b>BALANCES C/FWD 31 DECEMBER</b>	6.2	<b>9,551</b>	<b>20,816</b>	<b>1,000</b>	<b>31,367</b>	<b>27,468</b>

The notes on pages 5 to 6 form part of this account

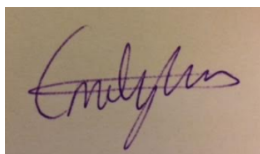
**ZOE SAROJINI EDUCATION TRUST****STATEMENT OF ASSETS AND LIABILITIES AT 31 DECEMBER 2020**

	Notes	Unrestricted Funds £	Restricted Funds £	Endowment Funds £	TOTAL 2020 £	TOTAL 2019 £
<b>CURRENT ASSETS</b>						
Cash at bank		9,551	20,816	1,000	31,367	27,468
<b>FUNDS OF THE CHARITY</b>						
Unrestricted	6	9,551	-	-	9,551	13,750
Restricted		-	20,816	-	20,816	12,718
Endowment		-	-	1,000	1,000	1,000
<b>TOTAL FUNDS</b>		<b>9,551</b>	<b>20,816</b>	<b>1,000</b>	<b>31,367</b>	<b>27,468</b>

Approved by the Trustees on

**22 October 2021**

and signed on its behalf by



Emily Young, Chair of the Trust

The notes on pages 5 to 6 form part of this account

**ZOE SAROJINI EDUCATION TRUST****YEAR ENDED 31ST DECEMBER 2020****NOTES TO THE FINANCIAL ACCOUNTS****Note 1 Basis of preparation****1.1 Basis of accounting**

The accounts have been prepared on a receipts and payments basis.

**1.2 Change in basis of accounting**

There has been no change to the accounting policies (valuation rules and methods of accounting) since last year.

**1.3 Changes to previous accounts**

No changes have been made to the accounts for the previous year .

**2. Accounting policies****2.1 Incoming resources**

Donations are recognised when received. Gift Aid refunds are recognised on receipt from the tax office. Gift aid for 2020 will be requested on total donations of £20,336.

**2.2 Resources expended**

Grants and donations are accounted for when paid over, or when awarded, if that award creates a binding or constructive obligation on the Trust. All other expenditure is generally recognised when it is incurred and is accounted for gross.

**2.3 Funds**

Endowment Fund is a fund, the capital of which must be maintained.

Restricted Funds represent grants and donations received for a specific object of the Trust. The funds may only be expended on the specific object for which they were given. Any balance remaining unspent at the end of each year must be carried forward as a balance on that fund.

Unrestricted Fund is a general fund which can be used for Trust ordinary purposes.

	2020	2019
<b>3. Cost of Generating Voluntary Income</b>		
Fund raising event*/Paypal charges for on-line payments	<b>£1,201</b>	<b>£119</b>
*2020 was a special year with an event was arranged to raise funds		
<b>4. Governance</b>		
Data protection fee		£35
Independent examiner's fees	<b>£85</b>	£65
	<b>£85</b>	£100
<b>5 Details of certain items of expenditure</b>		
<b>5.1 Trustee fees</b>		
Number of trustees who were paid fees	<b>none</b>	none
<b>5.2 Trustee expenses</b>	<b>none</b>	none

continued.....

**ZOE SAROJINI EDUCATION TRUST****YEAR ENDED 31ST DECEMBER 2020****NOTES TO THE FINANCIAL ACCOUNTS****6 Funds****6.1 Funds Held**

<b>Fund Name</b>	<b>Purpose and Restrictions</b>
<b>Cape Town</b>	This fund pays for the education costs of the children that we sponsor in Cape Town.
<b>Enrichment</b>	This fund covers extracurricular activities for our sponsored children, one-off education necessities such as uniforms and text books, and homework clubs.
<b>Khethani</b>	This fund covers the fees of our scholarship children who attend the Khethani School.
<b>Refugee Fund</b>	This fund supports grassroots refugee education projects in Greece and the Middle East.
<b>Zisize</b>	This fund covers the educational costs of children we support in conjunction with Zisize Education Trust.
<b>Misty Meadows</b>	This fund is to support the education of children at Misty Meadows in KwaZulu-Natal.
<b>University Funds</b>	This fund is to support the tertiary education of Zoe Trust children.

**6.2 Movements of funds**

<b>Fund names</b>	<b>Fund balances 1st January 2020 £</b>	<b>Incoming resources £</b>	<b>Outgoing resources £</b>	<b>Transfer of Funds (note 6.3) £</b>	<b>Fund balances 31st December 2020 £</b>
Khethani	9,473	13,973	- 10,670	-	12,776
Zisize	-	240	- 825	585	-
Enrichment	487	3,389	- 5,312	1,436	0
Cape Town (see note	201	7,696	- 2,705	-	5,193
Refugee Fund	389	3,024	- 3,944	531	0
Misty Meadows	-	13,323	- 14,967	1,644	-
University Fund	2,168	680	-	-	2,848
<b>Total Restricted</b>	<b>12,718</b>	<b>42,325</b>	<b>-38,423</b>	<b>4,196</b>	<b>20,816</b>
Endowment	1,000	-	-	-	1,000
Unrestricted	13,750	1,283	- 1,286	4,196	9,551
<b>Total Funds</b>	<b>27,468</b>	<b>43,608</b>	<b>-39,709</b>	<b>0</b>	<b>31,367</b>

**6.3 Transfer of Funds**

This represents transfer of funds from unrestricted to cover project expenditure

**6.4 Endowment Fund**

This sum is provided by the first trustees on the trusts declared in the trust deed.

**6.5 Unrestricted Fund****2020****2019**

This fund is broken down as follows

Designated as Reserves	7,000	7,000
To be Allocated	2,551	6,750
<b>Total</b>	<b>9,551</b>	<b>13,750</b>



## INDEPENDENT EXAMINER'S REPORT ON THE FINANCIAL STATEMENTS

### To the Trustees of Zoe Sarojini Education Trust

I report on the accounts of the Trust for the year ended 31 December 2020, which are set out on pages 1 to 6.

#### Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts.

The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

examine the accounts under section 145 of the Charities Act;  
to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the Charities Act; and  
to state whether any particular matters have come to my attention.

#### Basis of independent examiner's statement

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters.

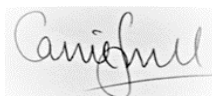
The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

#### Independent examiner's statement

In connection with my examination, no material matters have come to my attention: which gives me cause to believe that in any material respect:

- \* accounting records were not kept in accordance with section 130 of the Charities Act or
- \* the accounts do not accord with the accounting records

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



**Name:** Carrie Sewell

**Address** Henleaze House Henbury Road Bristol BS9 4PN

**Dated** 21st October 2021