

**REGISTERED COMPANY NUMBER: 07405980 (England and Wales)**  
**REGISTERED CHARITY NUMBER: 1139856**

**Report of the Trustees and  
Unaudited Financial Statements  
for the Year Ended 31 March 2024  
for  
PROGRESS EDUCATIONAL TRUST**

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**PROGRESS EDUCATIONAL TRUST**  
**Contents of the Financial Statements**  
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The accounts have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charitable company's governing document, the Companies Act 2006 and '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 2015 and as amended for accounting periods commencing from 1 January 2019).

## **1. OBJECTIVES AND ACTIVITIES**

The charity's objective is to advance the education of the public in general (and in particular among those concerned with genetic conditions and infertility) in the fields of human genetics, assisted conception and embryology, including their ethical and regulatory aspects.

The Trustees review the aims, objectives and activities of the Progress Educational Trust (PET) each year. The three strategic objectives identified by the trustees are

- Increase income and diversify revenue streams
- Extend PET's audience in the UK and internationally
- Maintain PET's reputation as a valued influencer and PET's reputation for clarity and accuracy

PET uses its three key areas of work (BioNews, events and engagement) to deliver these objectives. There is a rolling evaluation of how the charity's activities fulfil these objectives at both Trustees' and Advisory Committee meetings.

In carrying out their review, the Trustees have referred to the Charity Commission's general guidance on public benefit and, in particular, its supplementary public benefit guidance on the advancement of education. The Trustees also judge how planned activities will contribute to the objects of the charity.

## **2. MISSION, STRATEGIES AND PUBLIC BENEFITS**

The vision of PET is to improve choices for people affected by infertility or genetic conditions. The mission of PET is to educate and to debate the responsible application of reproductive and genetic science.

PET has continued to realise its vision and pursue its mission through the publication of BioNews, and through public events including an Annual Conference. BioNews – which is free of subscription charges – has a wide international readership, estimated to be in the region of 18,000.

PET engages with a wide range of age and interest groups, and educates the public about the complex scientific, ethical, legal and social issues that arise from genetics, genomics, assisted conception and embryo/stem cell research. PET public events are mostly free of charge, and are supported by donations, sponsorship or grant funding. Where a charge is made – for example, at the PET Annual Conference – concessions are offered for students, pensioners and those on benefits. All PET public events are widely advertised, so as to attract a large and diverse audience. 1,487 people attended PET events during this audit period.

PET collaborates with a wide range of organisations, in order to reach a more diverse audience and draw upon expertise. PET also works extensively with the media and other interested parties. The charity continues to be highly influential, and is regarded as a leading source of information and expertise on genetics, genomics, assisted conception and embryo/stem cell research.

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PET maintains strong links with both the UK Government and the Scottish Government. Outside the UK, PET engages with a wide range of organisations and institutions including the World Health Organisation (WHO), the European Society of Human Reproduction and Embryology (ESHRE), the International Society for Stem Cell Research, and the Global Alliance for Genomics and Health.

PET works in partnership with other organisations and institutions, leading projects that develop new approaches to policy, practice and research. Two such projects were launched during this audit period, while a third was launched towards the end of the previous financial year. The three projects are as follows.

- *Building Bridges Between Fertility Patients, Clinics, and Regulators: A Collaborative Approach*

This project is led by Professor Manuela Perrotta (Professor of Sociology of Technology and Organisation at Queen Mary University of London) together with Sarah Norcross (Director of PET), and is funded by the British Academy.

The project concerns 'add-ons' to IVF – optional treatments, technologies or procedures offered alongside IVF (often at considerable expense to patients), which may not be supported by reliable evidence. With involvement from patients, clinics, regulators and others, the project is developing proposals to address key challenges raised by IVF add-ons. The project is also developing a toolkit for use by patient and professional associations, clinics and regulators.

- *Governance of Stem Cell-Based Embryo Models (G-SCBEM)*

This project is coordinated by Christina Rozeik (Programme Manager at Cambridge Reproduction) together with Sandy Starr (Deputy Director of PET), and is funded by the Biotechnology and Biological Sciences Research Council and by the University of Cambridge.

The project concerns stem-cell-based embryo models (SCBEMs) – multicellular structures that resemble human embryos in some respects, but are created from stem cells rather than from eggs and sperm, and that can therefore pose a challenge to established scientific categories and regulatory arrangements. With an interdisciplinary working group of experts drawn from institutions across the UK, the project is developing the first governance framework for research involving SCBEMs.

- *Reproduction in the Age of Genomic Medicine: The Emergence, Commercialisation and Implications of PReconception Expanded CArrier Screening (PRECAS)*

This project's Principal Investigator is Professor Cathy Herbrand (Professor of Medical and Family Sociology at De Montfort University), who is leading the project in collaboration with fellow researchers and in partnership with PET (represented by the charity's Director, Sarah Norcross).

The project concerns expanded carrier screening (ECS) - an approach to testing and risk profiling in which prospective parents, and/or gamete donors, are tested before conception to see whether they unknowingly carry gene variants that could potentially lead to ill health in future children. The project explores ethical, practical and sociological questions raised by the growing use of this approach.

PET also shares its expertise by working with and serving on bodies including the following.

- *The British Fertility Society (BFS)*

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The PET Director is a Trustee of the BFS, and is also Chair of this organisation's Special Interest Group on Law, Policy and Ethics.

- *The National Fertility Group, convened by the Scottish Government*

The PET Director is a member of this Group, which brings representatives of Scotland's four NHS assisted conception units together with other NHS, patient and policy representatives.

- *The Patient Organisation Stakeholder Group, convened by the Human Fertilisation and Embryology Authority (HFEA)*

PET is represented by its Director in meetings of this Group, which liaises with the UK's fertility regulator.

- *Guidance development groups for genetic medicine, convened by the British Society for Genetic Medicine (BSGM)*

The PET Deputy Director is a member of two of these groups, which have published the clinical practice guidance documents *Ethical Issues in Prenatal Genetic Diagnosis and Prenatal Diagnosis* and *Preimplantation Genetic Testing for Germline Cancer Susceptibility Gene Variants*.

- *The Working Group for Good Practice Recommendations on Add-Ons, convened by ESHRE*

The PET Director is a member of this Working Group, which has developed good practice recommendations for the use of add-ons in reproductive medicine.

- *The Newborn Genomes Programme and Generation Study, launched by Genomics England*

PET collaborates on outreach and engagement aspects of these landmark initiatives, producing events where professionals and the public discuss the implications of sequencing the whole genomes of newborn babies.

- *The Human Developmental Biology Initiative*

PET works with this large-scale research initiative, advising and training on ethical, legal and social issues and on public communication and engagement.

- *The Genomics Education Programme, part of Health Education England*

PET continues to write regular articles for this Programme's website, improving understanding of genomics among England's health workforce.

- *The Working Group on Surrogacy Law Reform, convened by Surrogacy UK*

The PET Director is a member of this Working Group, led by a prominent not-for-profit surrogacy organisation.

- *Cambridge Reproduction's External Advisory Board*

The PET Director serves on this Board, advising the University of Cambridge's reproduction-focused strategic research initiative.

In addition to these roles, PET advises on and assists with other projects, including the following.

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- *The Future of Human Reproduction*

This project is led by Lancaster University and the University of Sheffield.

- *Direct-to-Consumer Genetic Testing and Donor-Conception: Support and Governance in Emerging Digital Systems*

This project is led by Professor Lucy Frith at the University of Manchester.

- *Off-Grid Donor Identity Disclosure: What Happens When People Trace Their Egg/Sperm/Embryo Donor through Social Media or Genetic Testing?*

This project is led by the University of Essex.

- *Precious Cells*

This project is led jointly by artist Anna Dumitriu and author (and former PET/BioNews Science Editor) Dr Marieke Bigg, together with the Human Developmental Biology Initiative and the Gurdon Institute.

Besides the organisations and institutions mentioned above, PET enjoys excellent relationships with other professional bodies such as the Association of Reproductive and Clinical Scientists (ARCS), the British Infertility Counselling Association, the Senior Infertility Nurse Group, and the Society for Reproduction and Fertility (SRF).

PET also continues to enjoy excellent relationships with charities and organisations supporting patients, families and those involved in or affected by donor conception, including the following.

- Antenatal Results and Choices
- Donor Conceived UK
- Donor Conception Network
- Fertility Alliance
- Fertility Network UK
- Genetic Alliance UK
- LGBT Mummies
- Lily Foundation
- Miscarriage Association
- Multiple Births Foundation
- Turner Syndrome Support Society
- Unique (the Rare Chromosome Disorder Support Group)

The work of PET remains vital to these and other organisations, with PET acting as a hub for policy discussion and ensuring that people affected by the issues in its remit – together with their families, carers and advocates – are kept up to date with the latest developments.

### **3. ACHIEVEMENTS AND PERFORMANCE**

#### **The Power of Three IVF Cycles**

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Following the substantial impact of the wide-ranging PET report *Fertility, Genomics and Embryo Research: Public Attitudes and Understanding* during the previous financial year, the charity decided to commission follow-up research. As before, this work was sponsored by the pharmaceutical company Ferring.

The *Fertility, Genomics and Embryo Research* report showed widespread public support for the provision of NHS-funded fertility treatment to people who are infertile and wish to conceive. This is consistent with the Fertility Guideline published by the UK's National Institute for Health and Care Excellence (NICE). However, PET was struck by the following observations.

- Since 2004, the NICE Fertility Guideline has recommended that if a woman is aged under 40 and if she or her partner have infertility, then she should be offered three full cycles of NHS-funded IVF.
- Despite this, two decades later many women who meet the criteria stipulated in the Guideline still find it difficult or impossible to access NHS-funded IVF (particularly if they live in England).
- The gatekeeper to referral for IVF treatment in England is (for many people) their GP.
- GPs making referrals apply criteria set by NHS Commissioners at the relevant Integrated Care System (ICS) and Integrated Care Board (ICB).

In order to better understand this situation, PET commissioned research specialists 2CV to assess levels of knowledge – concerning fertility services, IVF treatment, and specifically the IVF cycle – among GPs and NHS Commissioners in England.

2CV interviewed 194 GPs and six NHS Commissioners, across 40 out of 42 English ICS/ICB regions. The findings were published by PET in a report entitled *The Power of Three IVF Cycles*.

This report showed that knowledge of referral and eligibility criteria for IVF treatment among GPs and Commissioners, and understanding of completion points for IVF treatment, are at odds with the NICE Fertility Guideline. This incongruity is liable to result in poorer outcomes for fertility patients. Key findings of the report include the following.

- Around half of GPs report that their area meets or exceeds the NICE Guideline. This is almost certainly an overestimate, because earlier research indicates that only around 10-12% of areas are offering the recommended three IVF cycles.
- Only half of all GPs correctly identified that the NICE Guideline recommends three full cycles of IVF for women aged under 40.
- The profile of one's GP could make a difference to one's referral success, with female GPs more likely to refer patients for NHS-funded IVF treatment, compared with male GPs.
- Multiple embryos are often created as part of an IVF cycle, but only 16% of GPs correctly identified '*When all viable embryos are transferred*' as the IVF cycle completion point in the NICE Guideline.

These findings were reported in the *Guardian* newspaper which quoted the PET Director describing '*utter confusion over the current NICE fertility guideline*'. The same article quoted the Chair of the Royal College of General Practitioners, who responded to the report by saying: '*It is clear from this survey that the complexity of fertility treatment pathways across the country, and how this relates to NICE guidance, can cause confusion, both amongst GPs and patients.*'

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**PET in the media**

PET enjoyed a significant media profile throughout the year, making appearances across the national and international print, broadcast and online media. This included the following.

- Coverage of the PET Annual Conference and other PET events.
- Coverage of the PET Report *The Power of Three IVF Cycles* (including the example discussed above).
- Regular interviews with and use of quotes from the PET Director, in relation to the latest scientific and policy developments.

Media outlets that featured PET during the audit period included the following.





**FERTILITY  
ROAD**

**Focus on  
Reproduction**

**GEN** Genetic Engineering  
& Biotechnology News

**G R A Z I A**

**The  
Guardian**



**HR Grapevine**

 **INDEPENDENT**

**itv NEWS**



**PULSE**

**sky news**



### **Web traffic**

Between 1 April 2023 and 31 March 2024, there were 131,422 unique user visits (up 17.5%) to the PET website, with an average engagement time of 1m 17s. Nearly 70% of the users were acquired from organic search, 6% from email and 5% from social channels.

The international profile of PET continues to flourish, with visits from 208 countries as recorded by Google Analytics. A total of 52% of web traffic comes from within the UK (up 3%), and 18% of web traffic comes from the USA. The remaining 30% of web traffic is geographically diverse, with the leading contributors being Australia (accounting for 4% of traffic) and Canada (accounting for 3% of traffic) followed by India and Ireland (each accounting for 2% of traffic).

The PET website also enables PET to attract and engage with new volunteers, through a dedicated online form. 32 applications to volunteer were received via this form during the audit period.

### **BioNews**

BioNews – the flagship publication of PET – published to schedule throughout the audit period. BioNews content included a wide range of news articles, comment pieces, event synopses and reviews.

The top five most viewed BioNews articles published during the audit period were as follows.

1. News: CooperSurgical sued over recalled IVF culture medium (January 2024)  
<https://www.progress.org.uk/coopersurgical-sued-over-recalled-ivf-culture-medium/>
2. Comment: Landmark ruling for donor-conceived people regarding DNA-testing of gamete donors (October 2023)  
<https://www.progress.org.uk/landmark-ruling-for-donor-conceived-people-regarding-dna-testing-of-gamete-donors/>
3. Comment: How fast is too fast? Innovation in IVF and the burden of proof (July 2023)  
<https://www.progress.org.uk/how-fast-is-too-fast-innovation-in-ivf-and-the-burden-of-proof/>
4. News: Eight arrested in Crete over surrogacy and IVF fraud (August 2023)  
<https://www.progress.org.uk/eight-arrested-in-crete-over-surrogacy-and-ivf-fraud/>

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5. Comment: Law Commissions' proposals won't achieve surrogacy modernisation (April 2023)  
<https://www.progress.org.uk/law-commissions-proposals-wont-achieve-surrogacy-modernisation/>

#### BioNews Writing Scheme

During 2023-2024, seven students from University College London (UCL) and two from the University of Kent successfully participated in the BioNews Writing Scheme. They all provided positive feedback, and most of them went on to join the regular pool of volunteer BioNews writers.

Feedback from these students included the following.

- *'I have thoroughly enjoyed participating in the scheme and have learnt a great deal about news writing. Thank you so much for putting your time and effort in running the scheme, I will highly recommend to my colleagues.'*
- *'Thank you so much for giving me the opportunity to take part in the writing scheme. I have definitely noticed an improvement in my confidence with writing and in my non-academic writing skills. It has been very refreshing to take part in something outside of academia, I have thoroughly enjoyed it. Taking part in this scheme has now sparked my interest in the field of medical writing/communications and it is an area I am keen to continue to explore as a career beyond my PhD. I have passed on my recommendation for the scheme to others in my department.'*

PET keeps in contact with those who have completed the scheme, monitoring and encouraging the development of their careers. Most of these writers go on to become regular contributors to BioNews, and many of them also go on to work for prominent organisations in areas of relevance to PET.

#### Events

PET produced 11 public events during the audit period, five of which focused on law and regulation (in relation to surrogacy, gamete donation, 'add-ons' to IVF treatment, and fertility and embryo research in general). Of the remaining events, three concerned policy and funding (in relation to fertility treatment, the NICE Fertility Guideline, and the Women's Health Strategy published the previous year by the UK Government) while three concerned the way fertility-related healthcare is practised (in relation to counselling, welfare issues, and ongoing use of innovations introduced during the global COVID-19 pandemic).

All but one of the events produced during the audit period were held online. Having initially moved all of its events online in response to the COVID pandemic, PET discovered that a significant number of attendees found online meetings more convenient and therefore preferable. Additionally, audiences at PET events became much more geographically diverse following the move online, both within the UK and in terms of international attendees across the world.

All of that said, the one PET event held in person during the audit period – *Fertility Treatment for Single People: Who Should Pay?*, which took place at the Royal College of Physicians of Edinburgh – offered a welcome opportunity to return to some of the unique advantages afforded by in-person events (such as face-to-face networking and an atmospheric setting).

The 2023 PET Annual Conference was also due to be held in person, but due to the announcement of UK rail strikes (which would have prevented many of the speakers, organisers and delegates from reaching the conference venue) the conference had to be moved online at only two weeks' notice. This was a very difficult decision, both logistically and financially, as unfortunately PET was still liable for the cost of the conference venue. However, the move online

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was achieved successfully, and PET remains hopeful that it can hold its next Annual Conference in person.

PET draws upon a large and diverse circle of contacts when assembling speaker panels for its events. PET also seeks recommendations for speakers outside its orbit, in order to add further diversity and grow its circle of contacts. The charity's reputation helps to attract participation from speakers who are well known and highly regarded.

Prior to moving its events online, PET could only feature international speakers if sufficient sponsorship was secured, or if an event happened to coincide with a speaker's visit to the UK. Online, by contrast, the only major impediment to participating in PET events from anywhere in the world is time differences (if the event happens to take place at an unsociable local hour).

PET events during the audit period featured speakers who were based in Belgium, Denmark, the Netherlands and the USA. Events were attended by people from 45 non-UK countries – Argentina, Australia, Austria, Bahrain, Belgium, Bolivia, Brazil, Bulgaria, Canada, China, Cyprus, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong, Ireland, Israel, Italy, Japan, Jersey, Kenya, Lebanon, Malta, Mexico, the Netherlands, New Zealand, Nigeria, Norway, Poland, Portugal, Qatar, Romania, Saudi Arabia, South Africa, Spain, Suriname, Sweden, Switzerland, Thailand, Turkey, the United Arab Emirates and the USA.

Of the 11 events held during the audit period, 10 were free to attend and were chaired by Sarah Norcross. These events were subsequently made available in the following formats.

- Within days of an event taking place, it was the subject of a summary article published in BioNews at [www.progress.org.uk/bionews/](http://www.progress.org.uk/bionews/)
- Within weeks of an event taking place, it was made available to listen to or download on the PET podcast at [www.spreaker.com/show/progress-educational-trust-podcast](http://www.spreaker.com/show/progress-educational-trust-podcast)
- A number of events were also made available to watch on the PET YouTube channel at [www.youtube.com/ProgressEducationalTrust/videos](http://www.youtube.com/ProgressEducationalTrust/videos) and the remainder will be made available in this format during the next financial year.

The 10 free-to-attend events held during the audit period were as follows.

- *Surrogacy Law: What Is Intended... For Parents? For Surrogates? For Children?*  
Speakers: Beverley Addison, Professor Gillian Black, Dr Alan Brown, Alan Inglis  
Sponsor: Scottish Government  
BioNews article: [www.progress.org.uk/surrogacy-law-what-is-intended-for-parents-for-surrogates-for-children/](http://www.progress.org.uk/surrogacy-law-what-is-intended-for-parents-for-surrogates-for-children/)  
Podcast: [www.spreaker.com/episode/surrogacy-law-what-is-intended-for-parents-for-surrogates-for-children--53622893](http://www.spreaker.com/episode/surrogacy-law-what-is-intended-for-parents-for-surrogates-for-children--53622893)  
Film: <https://youtu.be/KO1F-2kxZw0>
- *NHS Fertility Treatment: Wouldn't It Be NICE to Have a Workable Guideline?*  
Speakers: Professor Melanie Davies, Professor Dame Clare Gerada, Dr Catherine Hill, Steve McCabe MP, Penny Mitchell, Sarah Norcross, Dr Chris Skedgel  
Sponsor: Ferring Pharmaceuticals  
BioNews article: [www.progress.org.uk/nhs-fertility-treatment-wouldnt-it-be-nice-to-have-a-workable-guideline/](http://www.progress.org.uk/nhs-fertility-treatment-wouldnt-it-be-nice-to-have-a-workable-guideline/)

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Podcast: [www.spreaker.com/episode/nhs-fertility-treatment-wouldn-t-it-be-nice-to-have-a-workable-guideline--54246532](http://www.spreaker.com/episode/nhs-fertility-treatment-wouldn-t-it-be-nice-to-have-a-workable-guideline--54246532)

Film: <https://youtu.be/lmpSQmcU4wA>

- *Counselling and Assisted Reproduction: When, Why and by Whom Should It Be Offered?*  
Speakers: Professor Jacky Boivin, Alison McTavish, Lee Noquet, Angela Park  
Sponsor: Scottish Government  
BioNews article: [www.progress.org.uk/counselling-and-assisted-reproduction-when-why-and-by-whom-should-it-be-offered/](http://www.progress.org.uk/counselling-and-assisted-reproduction-when-why-and-by-whom-should-it-be-offered/)  
Podcast: [www.spreaker.com/episode/counselling-and-assisted-reproduction-when-why-and-by-whom-should-it-be-offered--54569879](http://www.spreaker.com/episode/counselling-and-assisted-reproduction-when-why-and-by-whom-should-it-be-offered--54569879)
- *The Women's Health Strategy*  
Speakers: Nickie Aiken MP, Isaac Barnswell, Dr Raj Mathur, Professor Geeta Nargund, Laura-Rose Thorogood  
Sponsors: British Fertility Society, Merck  
BioNews article: [www.progress.org.uk/the-womens-health-strategy-one-year-on/](http://www.progress.org.uk/the-womens-health-strategy-one-year-on/)  
Podcast: [www.spreaker.com/episode/the-women-s-health-strategy--56227648](http://www.spreaker.com/episode/the-women-s-health-strategy--56227648)  
Film: <https://youtu.be/p58yqNu35kc>
- *Small Change: Is It Time to Reconsider Compensation for Gamete Donors?*  
Speakers: Dr Ben Hurlbut, Saghar Kasiri, Hayley King, Nayla Tohme  
Sponsors: Association of Reproductive and Clinical Scientists, British Fertility Society  
BioNews article: [www.progress.org.uk/small-change-is-it-time-to-reconsider-compensation-for-gamete-donors/](http://www.progress.org.uk/small-change-is-it-time-to-reconsider-compensation-for-gamete-donors/)  
Podcast: [www.spreaker.com/episode/small-change-is-it-time-to-reconsider-compensation-for-gamete-donors--56958547](http://www.spreaker.com/episode/small-change-is-it-time-to-reconsider-compensation-for-gamete-donors--56958547)
- *Opening the Register: How to Handle Disclosure of Gamete Donor Information*  
Speakers: Nina Barnsley, Laura Bridgens, Rachel Cutting, Rebekah Dundas  
Sponsor: Scottish Government  
BioNews article: [www.progress.org.uk/opening-the-register-how-to-handle-disclosure-of-gamete-donor-information/](http://www.progress.org.uk/opening-the-register-how-to-handle-disclosure-of-gamete-donor-information/)  
Podcast: [www.spreaker.com/episode/opening-the-register-how-to-handle-disclosure-of-gamete-donor-information--57061708](http://www.spreaker.com/episode/opening-the-register-how-to-handle-disclosure-of-gamete-donor-information--57061708)  
Film: <https://youtu.be/ybofqd8un4w>
- *Innovation from the Pandemic: From Video Appointments to Electronic Consent*  
Speakers: Lesley Benzie, Alison Elliot, Ciara Heatherwick, Dr Ashleigh Holt-Kentwell, George Hughes, Dave Wales  
Sponsor: Scottish Government  
BioNews article: [www.progress.org.uk/innovation-from-the-pandemic-from-video-appointments-to-electronic-consent/](http://www.progress.org.uk/innovation-from-the-pandemic-from-video-appointments-to-electronic-consent/)

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Podcast: [www.spreaker.com/episode/innovation-from-the-pandemic-from-video-appointments-to-electronic-consent--57346857](http://www.spreaker.com/episode/innovation-from-the-pandemic-from-video-appointments-to-electronic-consent--57346857)

- *Fertility Treatment for Single People: Who Should Pay?*

Speakers: Dr Alan Brown, Dr Catherine Jones, Dr Sarah Martins da Silva, Professor Guido Pennings

Sponsor: Scottish Government

BioNews article: [www.spreaker.com/episode/fertility-treatment-for-single-people-who-should-pay--58395659](http://www.spreaker.com/episode/fertility-treatment-for-single-people-who-should-pay--58395659)

Podcast: [www.spreaker.com/user/16947315/your-guide-to-genetics-and-genomics-in-t](http://www.spreaker.com/user/16947315/your-guide-to-genetics-and-genomics-in-t)

Film: <https://youtu.be/UomZFUY8mtQ>

- *IVF Add-Ons: How Should We Score the HFEA's New Ratings System?*

Speakers: Dr Tasha Alden, Dr Tim Child, Professor Joyce Harper, Tracey Sainsbury, Dr Ippokratis Sarris

Sponsor: British Fertility Society

BioNews article: [www.progress.org.uk/ivf-add-ons-how-should-we-score-the-hfeas-new-ratings-system/](http://www.progress.org.uk/ivf-add-ons-how-should-we-score-the-hfeas-new-ratings-system/)

Podcast: [www.spreaker.com/episode/ivf-add-ons-how-should-we-score-the-hfea-s-new-ratings-system--58701167](http://www.spreaker.com/episode/ivf-add-ons-how-should-we-score-the-hfea-s-new-ratings-system--58701167)

- *Welfare of the Fertility Patient: Spotting Signs and Treatment after Trauma*

Speakers: Professor Abha Maheshwari, Nicole McKeith, Ruth Phillips, Dr Susheel Vani

Sponsor: Scottish Government

BioNews article: [www.progress.org.uk/welfare-of-the-fertility-patient-spotting-signs-and-treatment-after-trauma/](http://www.progress.org.uk/welfare-of-the-fertility-patient-spotting-signs-and-treatment-after-trauma/)

Podcast: [www.spreaker.com/episode/welfare-of-the-fertility-patient-spotting-signs-and-treatment-after-trauma--59135994](http://www.spreaker.com/episode/welfare-of-the-fertility-patient-spotting-signs-and-treatment-after-trauma--59135994)

As well as its free-to-attend public events, PET also held its Annual Conference – for which there is an attendance fee – on 6 December 2023. This year's conference was entitled *How Much Change Do We Want? Updating Fertility, Embryo and Surrogacy Law*, and explored prospects for law reform in light of the latest scientific, social and political developments.

The five conference sessions were as follows. Each session was the subject of a summary article published in BioNews.

- *How Did We Get Here? The Story of the Statute*

Speakers: Professor Peter Braude

Chair: Sarah Norcross

BioNews article: [www.progress.org.uk/how-did-we-get-here-the-story-of-the-statute/](http://www.progress.org.uk/how-did-we-get-here-the-story-of-the-statute/)

- *Where Do We Go Next? The Case for Change*

Speakers: Julia Chain, Dr Rachel Gregoire, Dr Peter Rugg-Gunn, Ephra Yasmin

Chair: Sarah Norcross

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BioNews article: [www.progress.org.uk/where-do-we-go-next-the-case-for-change/](http://www.progress.org.uk/where-do-we-go-next-the-case-for-change/)

- *Challenges and Changes: What's Happening Across Europe?*

Speakers: Dr Kirsten Tryde Macklon, Dr Hafez Ismaili M'hamdi, Professor Anja Bisgaard Pinborg

Chair: Professor Joyce Harper

BioNews article: [www.progress.org.uk/challenges-and-changes-whats-happening-across-europe/](http://www.progress.org.uk/challenges-and-changes-whats-happening-across-europe/)

- *Looking to the Law: In the Clinic, in the Lab, in the Court*

Speakers: Professor Emily Jackson, Professor Kathy Niakan, Angela Pericleous-Smith, Andrew Powell

Chair: Andrew Spearman

BioNews article: [www.progress.org.uk/looking-to-the-law-in-the-clinic-in-the-lab-in-the-court/](http://www.progress.org.uk/looking-to-the-law-in-the-clinic-in-the-lab-in-the-court/)

- *Adapting to Change: Is Agreement Possible?*

Speakers: Dr John Appleby, Dr Sarah Chan, Professor Bobbie Farsides, Professor Susan Golombok

Chair: Danielle Hamm

BioNews article: [www.progress.org.uk/adapting-to-change-is-agreement-possible/](http://www.progress.org.uk/adapting-to-change-is-agreement-possible/)

The conference was sponsored by the Anne McLaren Memorial Trust Fund, the Edwards and Steptoe Research Trust Fund, the European Society of Human Reproduction and Embryology, Hertility, Born Donor Bank, Carrot Fertility, Ferring Pharmaceuticals, Merck, Theramex, the Association of Reproductive and Clinical Scientists, and the Institute of Medical Ethics.

Conference attendees who completed evaluation forms provided the following feedback.

- 97% thought the whole experience was 'excellent' or 'good'.
- 94% stated they were better informed as a result of attending the conference.
- 74% thought the opportunity to voice their opinion was 'excellent' or 'good'.

Freeform comments from conference attendees included the following.

- *'Great conference and range of speakers.'*
- *'A brilliantly organised and professional event.'*
- *'What a splendid array of speakers. You really did manage to cover a huge amount of ground at a key moment.'*
- *'All talks were very interesting and well chaired.'*
- *'I really enjoyed the conference. It was inspirational to hear as a medical student about the different specialities that people have found. It opened my eyes to the roles in which you can explore medical ethics professionally.'*
- *'A fantastic event – sorry it couldn't be held in person, but this was almost as good! Thank you to all involved.'*



# **PROGRESS EDUCATIONAL TRUST**

## **TRUSTEES' REPORT (including the Directors' Report)**

### **FOR THE YEAR ENDED 31 MARCH 2024**

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- *'Excellent event, extremely well put together especially given the last-minute change to online.'*
- *'PET is an absolutely essential part of this engagement with the public and all professionals involved in reproductive medicine and implications.'*

#### **Campaigning**

PET has long campaigned for more equitable public funding of fertility treatment and an end to the IVF 'postcode lottery'. During this financial year, such campaigning was refocused around the PET report *The Power of Three IVF Cycles*, and the report's core finding that crucial parts of the NICE Fertility Guideline are poorly understood by health professionals.

PET created a set of accompanying *Power of Three* campaign materials, including leaflets and guides to writing to one's MP about the issue. These materials were launched at the PET exhibition stand at the Fertility Show in London, an annual event attended by thousands of members of the public who face difficulty in conceiving a child. The event provides PET with an opportunity to speak to fertility patients face-to-face, and to offer these patients an alternative to information provided by exhibitors whose focus is more commercial.

#### **Parliamentary work**

PET had a high profile in the UK Parliament during the audit period, particularly in relation to the issue of fertility funding. In September 2023, PET organised a drop-in session in Parliament to discuss this topic with MPs. The session was hosted by Andrew Percy (Conservative MP for Brigg and Goole) and was attended by a cross-party selection of MPs including Alex Davies-Jones (Labour MP for Pontypridd), Flick Drummond (Conservative MP for Meon Valley) and Wera Hobhouse (Liberal Democrat MP for Bath).

This drop-in session was followed in October 2023 by debate on IVF provision in the House of Commons, and the PET *Power of Three IVF Cycles* report was listed and linked to in a debate pack for MPs published beforehand by the House of Commons Library. During the Commons debate, PET was referred to specifically - and the importance of the charity's work was acknowledged - by Hannah Bardell (Scottish National Party MP for Livingston), Alex Davies-Jones (Labour MP for Pontypridd) and Kate Osborne (Labour MP for Jarrow and Gateshead East).

PET's work on fertility funding also attracted the attention of the House of Lords during the audit period. Baroness Meral Hussein-Ece (Liberal Democrat Peer and Co-Chair of the All-Party Parliamentary Group on Population, Development and Reproductive Health) discussed PET and the *Power of Three IVF Cycles* report in an article she wrote for the policy publication *Chamber*.

PET also attended a Parliamentary Links Day held by the Royal Society of Biology, introduced by George Freeman (Minister for Science, Research and Innovation) and Chi Onwurah (Shadow Minister for Science, Research and Innovation), where the PET Deputy Director discussed policy challenges surrounding SCBEMs in a contribution from the floor. The PET Deputy Director went on to serve as an external reviewer for the Parliamentary Office of Science and Technology report *Human Stem-Cell-Based Embryo Models*.

#### **Other UK policy work**

The main UK law governing fertility treatment and embryo research is the Human Fertilisation and Embryology (HFE) Act, which was originally passed in 1990 and was last given a thorough update in 2008. A separate UK law that governs surrogacy, the Surrogacy Arrangements Act 1985, has never been given a thoroughgoing update.



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## **TRUSTEES' REPORT (including the Directors' Report)**

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There are many respects in which these two laws fail to meet the present-day needs of patients, practitioners, researchers, regulators and others. The case for reform of these laws and related regulation was the focus of the 2023 PET Annual Conference – hence the conference title *How Much Change Do We Want? Updating Fertility, Embryo and Surrogacy Law* - and was also addressed by much of the charity's other work during the audit period.

During the previous financial year, PET had begun drafting a comprehensive response to a consultation on HFE Act reform by the UK's fertility regulator, the HFEA. During this financial year, PET completed and submitted its response, addressing each of the four areas covered by the consultation – 'Patient safety and promoting good practice', 'Access to donor information', 'Consent' and 'Scientific developments' – in considerable detail.

Meanwhile, the PET Director also helped the BFS to develop its own response to the HFEA's consultation, in her capacity as Chair of that organisation's Special Interest Group on Law, Policy and Ethics. These consultation responses by PET and the BFS will serve as important reference points in ongoing work on policy and law reform.

In a related development, it was revealed during the audit period that at least one child with donated mitochondria had been born in the UK. This was significant news for PET, which had previously campaigned - alongside fellow charity the Lily Foundation – for the use of mitochondrial donation to be permitted in treatment. That campaign was successful, resulting in the Human Fertilisation and Embryology (Mitochondrial Donation) Regulations 2015 being passed into law.

The news that there had been a birth following mitochondrial donation was initially broken in an article by the *Guardian* newspaper. This article quoted the PET Director calling for people to '*respect the privacy of children with donated mitochondria, and their parents, not least because these parents are likely to have had prior experience of illness and bereavement in their family*'.

The PET Director was subsequently interviewed on this matter on the *Today* programme on BBC Radio 4, and across the broadcast media. *ITV News* sent an interviewer and camera crew to the PET office to conduct its interview, while *Sky News* interviewed the PET Director alongside the Principal Investigator of the PRECAS project. Meanwhile, the PET Chair of Trustees and the PET Deputy Director both spoke at an in-person media briefing about the issue held by the Science Media Centre (SMC).

Separately, the PET Deputy Director spoke at an SMC briefing to launch the PET-led G-SCBEM project. The PET Deputy Director also participated in a policy workshop held in Cambridge by the Centre for Science and Policy, to inform the work of G-SCBEM. Other participants in the Cambridge workshop included representatives of the WHO, the HFEA, the Health Research Authority and the Medicines and Healthcare Products Regulatory Agency.

#### **International policy work**

The highest-profile development in international policy of relevance to PET during the audit period was a ruling by the Supreme Court of the US state of Alabama, to the effect that cryopreserved embryos have the same legal status as children in that state. The PET Director was interviewed on TV by *BBC News*, discussing the implications of the ruling.

The Alabama ruling has far-reaching ramifications for US fertility clinics and embryo storage facilities, as it effectively precludes IVF as currently practised. The ruling also serves as a reminder that no country can afford to take reproductive freedoms for granted, and illustrates the need to make proactive public arguments for the merits of assisted conception.

Meanwhile, the audit period also saw the publication of ESHRE's *Good Practice Recommendations on Add-Ons in Reproductive Medicine*, published in the journal *Human*

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*Reproduction.* These 42 recommendations – which were co-authored by the PET Director, and are intended for international use – concern the use of 'add-ons' in diagnosis of fertility problems, in laboratories, and in the clinical management of IVF treatment.

#### **Public speaking and exhibiting**

In addition to producing its own events, PET also made many contributions to events held by others during the audit period. This included the PET Director presenting the charity's work at the Annual Conference of ESHRE in Copenhagen, and at the Fertility 2024 conference held jointly by ARCS, the BFS and the SRF in Edinburgh.

At the ESHRE conference, the PET Director gave a presentation entitled *A Quantitative Investigation into UK Public Attitudes towards Embryo Research and the 14-Day Rule*, discussing the findings of the previous year's *Fertility, Genomics and Embryo Research* report. At the Fertility 2024 conference, the PET Director gave a poster presentation entitled *Holding the Gate Shut? How GPs' Understanding of the NICE Guideline May Be a Barrier to Accessing IVF Treatment*, discussing the findings of the *Power of Three IVF Cycles* report.

Meanwhile, the PET Deputy Director gave two public presentations about the PET-led G-SCBEM project. The first of these presentations was given in Cambridge, at an event showcasing research projects related to reproduction and development. The second of these presentations was given at the Science Museum in London, at an event chaired by the award-winning science writer Dr Philip Ball, and was followed by a roundtable discussion with other experts.

The Science Museum event coincided with an exhibition held by PET at the same venue, as part of the 'Lates' programme which sees visitors explore the museum after usual visiting hours. For this exhibition, PET created special materials explaining the science and exploring the ethics of embryo research, with a focus on the '14-day rule' that only permits human embryos to be cultured and studied in the laboratory for a maximum of 14 days from fertilisation. PET staff and volunteers talked through the materials with museum visitors, encouraging people to reflect on the case for and against extending the 14-day limit.

Finally, the PET Deputy Director gave two filmed presentations marking significant anniversaries during the audit period. First, he gave a TEDx talk entitled *From Genomic Data to Genomic Knowledge* at Royal Holloway, University of London. This talk marked the 70th anniversary of the discovery of DNA's double helix structure, and also marked the 20th anniversary of the completion of the Human Genome Project.

The PET Deputy Director then gave an extended lecture entitled *The First Transhumanist? Haldane's 'Daedalus' 100 Years On*, for an event held in Bedfordshire by the charity Ideas Matter. This lecture explored the life and legacy of JBS Haldane, who at one time was the best-known scientist in Britain, and who pioneered the idea of IVF in his 1923 lecture and book *Daedalus*.

#### **Social media**

During the audit period, PET continued to share its events programme, BioNews articles and other material on various social media platforms.

The main objectives of the charity's social media presence are as follows.

- To drive followers to the PET website where they can read BioNews articles, subscribe to the BioNews email newsletter and other PET emails, watch PET films, listen to PET podcasts, register for PET events, volunteer with PET, and make donations.
- To increase PET visibility with all target audience groups.

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All PET social media platforms have seen growth in followers during the audit period, through organic growth only. The level of growth varies considerably between platforms and achieving previous reach levels organically is becoming increasingly challenging. The main social media channels used by PET are Twitter, Facebook, Instagram, LinkedIn, YouTube, Spreaker and RSS. PET added Threads to their list of social platforms in August 2023. As the social media platforms become increasingly competitive there is more need for greater levels of production quality/ animations for content.

*X (Twitter)*

This remains the most widely followed social platform for PET, with 7,044 followers (up from 6,922 a growth of just 2%). The performance metrics on X accessed without payment is now limited but a comparison of average rates using the data available shows a significant fall in organic impressions, down from a monthly average of 36K to 26K, a drop of 28%. Average engagement rates for the early part of the audit period and for which we can access data were holding at 2.5%.

*Facebook*

During this audit period, Facebook metrics also showed a fall in average month reach figures (down from 1490 to 1182, a drop of 21%. Follower growth was 2% for the period, up from 1,829 to 1,863 (platform metrics restated early in period).

*Instagram*

During the audit period, Instagram followers grew by 27% to 916. This platform continues to offer potential for organic growth. During the audit period engagement also showed an increase. Like all platforms reach fell as the need to pay to 'boost' posts to achieve larger exposure increased.

*LinkedIn*

This platform is of growing importance to PET, due to its ability to grow organically and also the younger profile of its users, who find the platform helpful in relation to their professional roles. The PET LinkedIn page has seen 95% growth in its number of followers. The professional nature of the followers makes it a good fit for PET and one to increasingly focus on.

*Threads*

This is the newest platform for PET, the charity first posted on the 1 August 2023 and has 192 followers. Limited attention is currently given to this area.

*YouTube*

Users who subscribe to the PET YouTube channel are notified of the publication of new PET films directly via YouTube, instead of (or in addition to) seeing these films embedded in BioNews articles on the PET website. This is not actively promoted as there is greater value to PET if those who are interested engage through the website. During this audit period, subscribers to the PET YouTube channel remained static, 393 versus 391 at the previous audit.

*Spreaker*

Users who subscribe to the PET podcast via Spreaker, or via one of the many podcast platforms to which Spreaker is syndicated (these include Apple, Google, iHeart, Spotify and others), are notified of the publication of new PET podcasts directly, instead of (or in addition to) seeing these podcasts embedded in BioNews articles on the PET website.

*RSS*

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PET makes BioNews articles available via an RSS (Really Simple Syndication) feed on its website. This enables users to subscribe to the BioNews feed via an RSS reader, or alternatively enables other websites to embed the BioNews feed.

#### **4. FINANCIAL REVIEW**

##### **Overview**

Total income was £290,409 (2023: £270,969) which is an increase of 7.2% in comparison with the previous financial year. This is due to an increase in grant income received in the year; and this together with increased income from a busy year for conferences and events, and an increase in our consultancy work, outweighed the drop in income from sponsorship.

PET income from donations declined to £22,049 including gift aid (2023: £24,854).

Total expenditure, including support costs, amounted to £274,558 (2023: £258,106) which is an increase of 6.2% compared with the previous financial year. The main expenditure item continued to be staff costs which at £198,249 (2023: £172,817) accounted for 72% (2023: 67%) of total expenditure.

Net assets at the Balance Sheet date were £380,469 (2023: £364,618) and all funds held were unrestricted.

Future financial viability of the charity is dependent on the continued financial support of grant funding bodies, clients for the PET writing and training work, sponsors of their events, advertisers and private donors.

Future viability will also depend upon the many greatly valued Friends, Volunteers and Advisers, without whose support the charity could not survive.

##### **Reserves policy**

PET holds reserves for a number of purposes which include:

- Paying for unanticipated in-year costs such as maternity pay or long-term staff sickness.
- Paying for an unforeseen emergency or other unexpected need for funds, e.g. an unexpected large repair bill or finding 'seed-funding' for an urgent project.
- Allowing Trustees to invest in new areas of work to achieve the long-term vision of PET.
- Covering a gap in funding if a core funding source were to unexpectedly shrink, to give the Trustees time to take action.
- Meeting planned commitments that cannot be funded by future income alone, e.g. plans for a major asset purchase or a significant project.
- Covering short-term deficits in a cash budget.

Trustees consider that, given current turnover and staffing, maintaining free reserves in the range between £100k and £250k makes adequate provision for these purposes.

This policy is reviewed by the Trustees on an annual basis.

The Trustees have assessed the major risks to which the charity is exposed, in particular those related to the operations and finance of the charity, and have developed a risk management strategy which involves:

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- A regular review of the principal risks and uncertainties that the charity faces.
- The establishment of policies, systems and procedures to mitigate risks identified.
- The implementation of procedures designed to minimise or manage any potential impact on the charity should those risks materialise.

## **5. FUTURE DEVELOPMENTS**

During the next financial year, PET will do the following.

- Address the paucity of public resources centralising fertility treatment information, by developing and launching a Fertility Policy Tracker that enables patients to find Integrated Care Boards' policies throughout England.
- Maintain work on partnership projects, finalising proposals and an accompanying toolkit that address IVF-add-ons (as part of the 'Building Bridges Between Fertility Patients, Clinics, and Regulators' project) and finalising a governance framework for research involving SCBEMs (as part of the G-SCBEM project).
- Celebrate the 25th anniversary of its BioNews publication.
- Hold public events marking significant anniversaries including the 100th birthday of the late Baroness Mary Warnock (PET Patron and the original architect of the UK's fertility and embryo research law), the 40th anniversary of the first announcement that a child had been born following egg donation, and the 10th anniversary of the first live birth following a uterus transplant.
- Exhibit again at the Science Museum in London, as part of that venue's 'Lates' programme.
- Seek new public speaking opportunities, within the UK and also abroad.
- Seek to hold its Annual Conference in person (the last time a PET Annual Conference was held in person was 2019).

## **6. STRUCTURE, GOVERNANCE AND MANAGEMENT**

The charity is a company limited by guarantee, incorporated on 13 October 2010, its predecessor charity of the same name having been originally established in May 1992 as an unincorporated charitable trust.

The charitable company is governed by its memorandum and articles of association and is managed by a board of Trustees who are the directors of the company and are appointed in accordance with the articles of association. The Trustees can appoint additional Trustees by invitation.

The articles of association state there must be a minimum number of Trustees in office of three and there is no maximum number.

The Trustees, who are directors of the company for the purposes of company law, and who served during the year were:

- Robin Lovell-Badge – Chair of Trustees
- Kerry Dyus
- Frances Flinter

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- Alison McTavish
- Allan Pacey
- Chris Sivers
- Natalie Nicoll
- Peter Taylor

None of the Trustees has any beneficial interest in the company.

All Trustees are members of the company and guarantee to contribute the sum of £10 each in the event of a winding up.

All Trustees give freely of their time and no remuneration or benefits are paid to them.

During the audit period, £940 was paid in relation to an insurance policy that includes indemnity insurance for the Trustees.

All Trustees are kept up to date with ongoing developments in charity law and practice with appropriate training courses being considered if appropriate. It is the policy of the Trustees to provide new Trustees with all relevant information appertaining to the charity and its affairs upon induction in order that they can obtain a sufficient level of knowledge to enable them to perform their roles effectively.

The Trustees met three times during the year to provide additional support to the staff. The decisions of the Trustees are recorded by written minutes. The Trustees refer to the Advisory Committee set up to assist them on matters relating to the activities of the charity.

The Trustees have assessed the major risks to which the charity is exposed and are satisfied that systems are in place to mitigate exposure to those risks.

### **Advisory Committee**

The Advisory Committee has a depth of skills and experience in genetics, embryology, assisted conception, stem cell research, clinical practice, media, education, information technology, marketing, business, commercial practices, law, medical ethics and charity management.

Peter Taylor (Trustee) chairs this committee. The Committee met once during the audit period.

### **Patron**

The charity's Patron is Professor Marcus Pembrey, who is one of the founders of PET and was also a member of the charity's precursor organisation, the Progress Campaign for Research into Human Reproduction. He is Emeritus Professor of Paediatric Genetics at University College London's Institute of Child Health, and served as Chair of Trustees at PET for more than 20 years.

### **Staff**

During the period the charity had up to seven employees at any one time, filling two full-time and six part-time positions.

Sarah Norcross (Director) manages the day-to-day operations of the charity, supported by Sandy Starr (Deputy Director).

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Jennifer Willows continued in her roles as both Projects Officer and BioNews Legal Editor. Amanda Cooney continued as Marketing Manager.

Dr Joanne Delange continued as BioNews Genetics Editor and Hannah Flynn continued as BioNews Science Editor.

Dr Paige Linnell was recruited in March 2023, in the new post of Fundraising Manager. She left that post in June 2023. David Hill took over this role in October 2023.

**Volunteers**

PET is extremely grateful for the help of highly motivated and professional volunteers. Volunteer opportunities in the PET office were limited, but the audit period again saw many new volunteer applications received from people wishing to write for BioNews and/or help the charity remotely.

PET is an equal opportunity organisation, and is committed to a working environment that is free from any form of discrimination on the grounds of colour, race, ethnicity, religion, sex, sexual orientation or disability.


**7. AUDITORS / INDEPENDENT EXAMINERS**

Aryeh Melinek  
Melinek Fine LLP  
Chartered Accountants  
First Floor Winston House  
349 Regents Park Road  
London  
N3 1DH

**8. STATEMENT OF DISCLOSURE TO THE INDEPENDENT EXAMINERS**

Each of the Trustees has confirmed that there is no information of which they are aware which is relevant to the independent examination but of which the independent examiners is unaware. They have further confirmed that they have taken appropriate steps to identify such relevant information and to establish that the auditor is aware of such information.

The Trustees' report was approved by the Board of Trustees on 22 January 2025 and signed on its behalf by:



Robin Lovell-Badge  
Trustee

**Independent Examiner's Report to the Trustees of  
Progress Educational Trust**

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**Independent examiner's report to the trustees of Progress Educational Trust ('the Company')**

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 March 2024.

**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**

Since your charity's gross income exceeded £250,000 your examiner must be a member of a listed body. I can confirm that I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

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.



Aryeh Melinek, FCA

Melinek Fine LLP  
Chartered Accountants  
First Floor, Winston House  
349 Regents Park Road  
London  
N3 1DH

Date: 22/01/2025



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**Statement of Financial Activities  
(Incorporating an Income and Expenditure Account)  
FOR THE YEAR ENDED 31 MARCH 2024**

		2024 Unrestricted funds £	2023 Unrestricted funds £
<b>INCOME AND ENDOWMENTS FROM</b>	Notes		
Donations and legacies	2	22,049	24,854
<b>Charitable activities</b>	3		
Charitable activities		257,207	236,523
Other trading activities	4	7,401	8,370
Investment income	5	<u>3,752</u>	<u>1,222</u>
<b>Total</b>		<u>290,409</u>	<u>270,969</u>
<b>EXPENDITURE ON</b>			
<b>Charitable activities</b>			
Charitable activities		<u>274,558</u>	<u>258,106</u>
<b>NET INCOME</b>		15,851	12,863
<b>RECONCILIATION OF FUNDS</b>			
Total funds brought forward		<u>364,618</u>	<u>351,755</u>
<b>TOTAL FUNDS CARRIED FORWARD</b>		<u>380,469</u>	<u>364,618</u>

The notes form part of these financial statements

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**Balance Sheet  
31 MARCH 2024**

		2024 Unrestricted funds £	2023 Unrestricted funds £
<b>FIXED ASSETS</b>	Notes		
Tangible assets	11	1,393	761
<b>CURRENT ASSETS</b>			
Debtors	12	17,604	17,595
Cash at bank		<u>378,220</u>	<u>407,351</u>
		395,824	424,946
<b>CREDITORS</b>			
Amounts falling due within one year	13	(16,748)	(61,089)
		<u>379,076</u>	<u>363,857</u>
<b>NET CURRENT ASSETS</b>			
		<u>380,469</u>	364,618
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>			
		<u>380,469</u>	<u>364,618</u>
<b>FUNDS</b>			
Unrestricted funds		<u>380,469</u>	<u>364,618</u>
<b>TOTAL FUNDS</b>		<u>380,469</u>	<u>364,618</u>

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 March 2024.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 March 2024 in accordance with Section 476 of the Companies Act 2006.

The trustees acknowledge their responsibilities for

- (a) ensuring that the charitable company keeps accounting records that comply with Sections 386 and 387 of the Companies Act 2006 and
- (b) 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 surplus or deficit 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.

These financial statements have been prepared in accordance with the provisions applicable to charitable companies subject to the small companies regime.

The financial statements were approved by the Board of Trustees and authorised for issue on 22 January 2025 and were signed on its behalf by:

*Robin Lovell-Badge*

Professor R H Lovell-Badge - Trustee

The notes form part of these financial statements

**PROGRESS EDUCATIONAL TRUST**  
**Notes to the Financial Statements**  
**FOR THE YEAR ENDED 31 MARCH 2024**

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**1. ACCOUNTING POLICIES**

**Basis of preparing the financial statements**

The financial statements of the charitable company, 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 Companies Act 2006. The financial statements have been prepared under the historical cost convention.

**Financial reporting standard 102 - reduced disclosure exemptions**

The charitable company 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.

**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.

Computer equipment            -    25% on cost

**Taxation**

The charity is exempt from corporation 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.

**Pension costs and other post-retirement benefits**

The charitable company operates a defined contribution pension scheme. Contributions payable to the charitable company's pension scheme are charged to the Statement of Financial Activities in the period to which they relate.

**PROGRESS EDUCATIONAL TRUST**

**Notes to the Financial Statements - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**2. DONATIONS AND LEGACIES**

	2024	2023
	£	£
Donations	18,259	21,107
Gift aid	<u>3,790</u>	<u>3,747</u>
	<u>22,049</u>	<u>24,854</u>

**3. INCOME FROM CHARITABLE ACTIVITIES**

	2024	2023
	£	£
Grants	62,849	18,963
Sponsorships	101,368	172,204
Conferences and events	22,918	5,880
Consultancy	70,072	37,758
Other	-	1,718
	<u>257,207</u>	<u>236,523</u>

**4. OTHER TRADING ACTIVITIES**

	2024	2023
	£	£
Advertising	<u>7,401</u>	<u>8,370</u>

**5. INVESTMENT INCOME**

	2024	2023
	£	£
Deposit account interest	<u>3,752</u>	<u>1,222</u>

**6. SUPPORT COSTS**

	Finance	Governance costs	Totals
	£	£	£
Charitable activities	<u>2,956</u>	<u>1,500</u>	<u>4,456</u>

Governance costs of £1,500 are the cost of independent examination.

**7. NET INCOME/(EXPENDITURE)**

Net income/(expenditure) is stated after charging/(crediting):

	2024	2023
	£	£
Depreciation – computer equipment	465	5
Computer software amortisation	<u>-</u>	<u>6,641</u>

**PROGRESS EDUCATIONAL TRUST**

**Notes to the Financial Statements - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**8. TRUSTEES' REMUNERATION AND BENEFITS**

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

**Trustees' expenses**

There were no trustees' expenses paid for the year ended 31 March 2024 nor for the year ended 31 March 2023.

**9. STAFF COSTS**

	2024	2023
	£	£
Wages and salaries	182,632	159,490
Social security costs	11,835	9,936
Other pension costs	<u>3,782</u>	<u>3,391</u>
	<u>198,249</u>	<u>172,817</u>

The total employee benefits of key management personnel were £62,594 (2023: £58,881).

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

	2024	2023
	<u>7</u>	<u>6</u>
Employees		

The number of employees whose employee benefits (excluding employer pension costs) exceeded £60,000 was:

	2024	2023
	<u>1</u>	<u>-</u>
£60,001 - £70,000		

**10. INTANGIBLE FIXED ASSETS**

	Computer software £
<b>COST</b>	
At 1 April 2023 and 31 March 2024	<u>26,561</u>
<b>AMORTISATION</b>	
At 1 April 2023 and 31 March 2024	<u>26,561</u>
<b>NET BOOK VALUE</b>	
At 31 March 2024	<u>-</u>
At 31 March 2023	<u>-</u>

**PROGRESS EDUCATIONAL TRUST**

**Notes to the Financial Statements - continued  
FOR THE YEAR ENDED 31 MARCH 2024**

**11. TANGIBLE FIXED ASSETS**

	Computer equipment £
<b>COST</b>	
At 1 April 2023	5,223
Additions	1,097
Disposals	<u>(434)</u>
At 31 March 2024	<u>5,886</u>
<b>DEPRECIATION</b>	
At 1 April 2023	4,462
Charge for year	465
Eliminated on disposal	<u>(434)</u>
At 31 March 2024	<u>4,493</u>
<b>NET BOOK VALUE</b>	
At 31 March 2024	<u>1,393</u>
At 31 March 2023	<u>761</u>

**12. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	2024	2023
	£	£
Trade debtors	17,604	15,378
Prepayments and accrued income	<u>-</u>	<u>2,217</u>
	<u>17,604</u>	<u>17,595</u>

**13. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	2024	2023
	£	£
Social security and other taxes	4,248	4,470
Accruals and deferred income	<u>12,500</u>	<u>56,619</u>
	<u>16,748</u>	<u>61,089</u>

**14. RELATED PARTY DISCLOSURES**

Total donations of £516 (2023: £381) were made by the trustees to the charity. There were no other related party transactions for the year ended 31 March 2024 or the year ended 31 March 2023.