

FINANCIAL STATEMENTS
FOR THE YEAR ENDED

31 AUGUST 2020

THE SOCIETY FOR THE
ADVANCEMENT OF
PHILOSOPHICAL
ENQUIRY AND
REFLECTION IN
EDUCATION
(A company limited by
guarantee)

THE SOCIETY FOR THE ADVANCEMENT OF
PHILOSOPHICAL ENQUIRY AND REFLECTION IN
EDUCATION
(A company limited by guarantee)

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REFERENCE AND ADMINISTRATIVE DETAILS OF THE COMPANY, ITS TRUSTEES AND ADVISERS FOR THE YEAR ENDED 31 AUGUST 2020

| | |
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| Trustees | Kay Chapman Alison Barne Ivana Mahendra, Chair Rod Cunningham Finia Kuhlmann Georgina Pattisson Brusik Paul Stockley Jeannie Cohen Jack Langley, Treasurer |
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| Company registered number | 7821030 |
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| Charity registered number | 1144595 |
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|---|---|
| Registered office and principal office | Centrum House 36 Station Road Egham Surrey TW20 9LR |
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|--------------------------|--------------|
| Company secretary | Mary Boullin |
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| Chief executive officer | Amelia Foster |
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|-----------------------------|--|
| Independent Examiner | Malcolm Lucas FCA Menzies LLP Chartered Accountants Centrum House 36 Station Road Egham Surrey TW20 9LF |
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|----------------|---|
| Bankers | The Co-operative Bank The Cloth Market Newcastle upon Tyne NE1 1EE |
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THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

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TRUSTEES' REPORT FOR THE YEAR ENDED 31 AUGUST 2020

The trustees are pleased to present their annual trustees' report together with the financial statements of the charity for the year ending 31 August 2020 which are also prepared to meet the requirements for a directors' report and accounts for Companies Act purposes. The financial statements comply with the Charities Act 2011, the Companies Act 2006, the Memorandum and Articles of Association, 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) (second edition, effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

SAPERE's objects and aims, as set out in its articles, are:

'The object of the society is the advancement of education for the public benefit, in particular amongst those young persons up to the age of 16 years, by the promotion of the development of their skills in logical thinking and other philosophical techniques so that their personal and social lives are enriched.'

Our mission is to advance the educational, social and personal development of children and young people, particularly those facing disadvantage, through the practice of philosophical enquiry and reflection. We train teachers in an approach called Philosophy for Children (P4C), which encourages critical, creative, collaborative and caring thinking.

We achieve this by:

- training teachers in P4C
- supporting schools and other organisations to embed P4C in their practices, curricula and ethos, ensuring that high quality and progressive philosophical engagement can be sustained
- co-ordinating, developing and quality assuring a national network of SAPERE registered trainers
- collaborating with partners to extend the reach and influence of P4C
- facilitating research into and developing P4C

We work to overcome issues of educational disadvantage and to educate for reasonable and reflective individuals and institutions.

In the long term, we aim to bring the benefits of P4C to as many people as possible and to inform and influence educational practice and policy.

In setting their objectives the trustees have had regard to the Charity Commission's guidance on public benefit.

1.1 Ensuring our work delivers our aims

We review our aims, objectives and activities each year. This review looks at what we have achieved and the outcomes of our work in the previous 12 months, at the success of each key activity and at the benefits brought to those we are set up to help. The review also helps us ensure our aims, objectives and activities remained focused on our stated purposes. The trustees are familiar with the Charity Commission's guidance on public benefit and have taken it into account when making a decision to which the guidance is relevant. We have regard to it when reviewing our aims and objectives and in planning our future activities and, in particular, the trustees consider how planned activities will contribute to the aims and objectives they have set.

The second half of this year has been incredibly challenging for SAPERE, for the education sector within which we operate, and for the charity sector as a whole. The coronavirus pandemic has caused significant disruption to every aspect of our work, from how our trainers deliver P4C training, to how SAPERE supports trainers, to how our staff team work on a day-to-day basis. Its ongoing effects are cultural, organisational and strategic.

When the first national lockdown was imposed in March 2020, we were forced to cancel all our face-to-face open courses, from Level 1 to Level 3, for the rest of the school year. With the closure of schools to almost all children and all but the most essential staff, our trainers were unable to go into schools to provide P4C training and support. As an organisation devoted to meaningful dialogue and interaction, such changes in the ways in which schools operate were devastating. It also meant

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that most of our income dried up overnight. As a consequence, we reported a serious incident relating to significant financial loss to the Charity Commission for England and Wales on 19 March 2020.

The focus of the trustees and the Chief Executive shifted almost overnight to ensuring that SAPERE continued to deliver – as far as was possible – on our mission, while at the same time shoring up the charity for a future in a new and changed world. Our trainers and staff responded with commitment and flexibility, developing new ways of working, and moving training and support online. We would like to thank all those involved for their commitment and resilience. As an organisation, we acted quickly to adapt our Level 1 Foundation course for online delivery, began work on an online offering for our Level 2A course, and created and distributed P4C resources for teachers working with smaller numbers of children in school as well as children at home, and for parents grappling with remote learning. We examined all our costs and made savings wherever possible, including reducing our office costs and accessing the furlough scheme for staff where appropriate. We also sought out new funders.

The trustees were delighted to see that, despite the huge challenges of delivering learning and pastoral care in a pandemic, teachers, teaching assistants, support staff and senior leaders in the schools we work with were still able to create space and time for P4C. In online enquiries, in keyworker classrooms, on online learning platforms and social media and as children began to return to school, P4C gave students – and staff – opportunities to think and talk together, to try to make sense of a world turned upside down. The following quotes from teachers and parents illustrate the value that P4C has continued to have in schools which practise it:

"Although it felt strange at first, sitting two metres apart, the enquiry opened up a space for pupils to discuss how they are feeling about returning to school and to talk about the time they have experienced away from school ... It was also really important for us to talk about any misconceptions which might have been worrying the pupils about returning to school or their health in general. My group ended up discussing the question 'Should leaders make decisions on facts or feelings?' and we had a big discussion about the impact of the news."

Nicole Saunders, SAPERE trainer and P4C Lead at SAPERE Gold Award School, Manorfield Primary in east London

"My little boy, Sam, was over the moon following his first P4C Zoom enquiry. He told me that he can't wait for the next session. As parents, we can provide games, fitness and fun but our children are craving interaction with their mates and being able to see familiar faces. I can't praise enough how well this was all handled and how he seems to be filled with renewed energy."

Manorfield parent, Twitter

Some schools were still able to submit their award applications; some were still able to make time for their staff to join online training. Launched in May 2020, our online Level 1 Foundation course proved extremely popular over the summer. The trustees were particularly pleased to see that the enforced move to online delivery had the benefit of opening up SAPERE's training to delegates who might not previously have been able to attend in-person training. Small schools in remote rural areas, mindful of travel and supply costs, can struggle to access in-person training in city centres, while international delegates are not always able to come to the UK to train with SAPERE. Online training, accessed in shorter modules and from home or a workplace, can sometimes be more accessible.

Despite these positives, the capacity of schools to engage with training and support, and to commit to the development of their P4C practice, continues to be seriously reduced. It is currently impossible to predict when schools will return to some kind of normality, but SAPERE is doing all it can to be ready for a post-Covid education system, including advocating for a different approach to education in which P4C should play a part.

There is no doubt that SAPERE is facing a very challenging period in which the delivery of training and support is largely restricted to the online model and in which schools are less focused on Continuing Professional Development (CPD). However, SAPERE was fortunate to enter 2020 in a relatively healthy financial position and significant steps have since been made by the Chief Executive, both to restructure the finances of the organisation and to overhaul the ways in which the charity operates. The trustees are confident that this work will allow SAPERE to weather the storm and enable it to continue to deliver high quality, sustainable P4C in future.

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TRUSTEES' REPORT (CONTINUED) FOR THE YEAR ENDED 31 AUGUST 2020

1.2 The focus and public benefit of our work

SAPERE regards its primary beneficiaries as being the children, young people and members of community groups who participate in P4C sessions. SAPERE's secondary beneficiaries are the teachers, educational professionals and community group leaders who are trained by SAPERE.

We help schools establish a collaborative, caring, critical and creative culture. We do this by training educators in the techniques of philosophical enquiry and by embedding excellent practice in P4C in schools and community groups.

The beneficial results of P4C are now well established by research. Regular practice of P4C has been shown to improve children's social skills, behaviour and resilience. All are important for the wellbeing of our primary beneficiaries during their years in school and when they become adults. However, the trustees also place importance on the practice of philosophy by our beneficiaries as an end in itself, being a satisfying and enjoyable activity. More is said about research in section 1.3.2 below.

The trustees believe that the practice of high quality and sustainable P4C offered by SAPERE has long term benefits for individual students, as evidenced by the research discussed in 1.3.2 below, as well as for teachers and for school communities as a whole. We also believe that high quality and sustainable P4C brings wider benefits to society as a whole, through the development of more engaged, thoughtful and reflective citizens better able to participate in the world around them and with the critical thinking and oral communication skills to do so.

We provide a range of training, support and resource provision in pursuit of our mission. All our activities are undertaken to further our charitable purposes for the public benefit.

1.3 Achievements and performance; how our activities have promoted our aims for the public benefit

This section looks at our achievements and performance and how we measure them.

1.3.1 How we ensure that our activities are promoting the public benefit

We measure how our activities have promoted our charitable objects for the public benefit in three ways:

- research
- our award scheme
- the number of schools and teachers trained, and hence the number of children who have benefited from P4C

In the latter part of the period under review, all three measures have been disrupted by the coronavirus pandemic.

1.3.2 Research

As set out above, the trustees consider that the practice of Philosophy for Children is a worthwhile end in itself. However, SAPERE also engages in research in order to understand what other benefits P4C brings to children and teachers, and in order to improve our services.

SAPERE took part in research by the Education Endowment Foundation (EEF) and the Nuffield Foundation which in 2015 reported promising results in both non-cognitive and cognitive skills. For more information about the research, see <https://educationendowmentfoundation.org.uk/our-work/projects/philosophy-for-children> and <http://www.nuffieldfoundation.org/non-cognitive-impacts-philosophy-children>. Following this, in 2016-17 we entered into a new and larger randomised controlled trial, the EEF Effectiveness Trial, which sought to replicate the outcomes of the earlier trials on a larger scale and which had been due to conclude during the year under review. However, the national lockdown meant that changes had to be made and the trial extended. Our trainers were unable to deliver the remaining training and support as envisaged, teachers were focused on other priorities, many schools were unable to complete award submissions within the original timescale, and the cancellation of Key Stage 2 assessments meant that the original outcome measures of the second data set had to be revised. We are grateful to the EEF for their continued support and assistance during this time.

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The final report (published after the period under review in February 2021) found no evidence that P4C has a positive or negative impact on reading attainment for pupils eligible for free school meals or on reading and maths attainment for the entire cohort. It did find that teachers taking part in the study overwhelmingly felt that P4C had a positive impact on their pupils' social, thinking and communication skills. This suggests that schools seeking to address social, emotional, behavioural and well-being outcomes can implement P4C without reducing reading or maths outcomes.

In schools which fully implemented P4C, teachers and pupils found it enjoyable, engaging and that it encouraged pupils to share opinions in a non-judgmental way. Teachers found P4C to be particularly beneficial for pupils with English as an Additional Language, those who lacked confidence, and those with special educational needs. Teachers and P4C leads also felt strongly that the training and ongoing support provided by SAPERE was high quality and that it had enabled them to facilitate P4C sessions effectively in their school.

- 96% felt that P4C helped pupils to respect others' opinions
- 91% felt that P4C improved pupils' ability to question and reason
- 93% felt that P4C improved pupils' ability to express views clearly

Teachers also reported that those pupils who struggle to 'have a voice' in normal lessons benefited the most from P4C and pupils themselves emphasised that they enjoyed being able to express their own opinions in a non-judgmental way.

"We have a huge number of disadvantaged children in this school, we are way above the national average. It's quite interesting how quite a lot of the P4C sessions have ended up going towards big questions in terms of things like poverty, how people are treated, all sorts of things like that. So I think for them, personally, it has been quite useful because they've been able to talk about massive issues that affect them as a community and in their personal lives as well. [...] It's giving them a voice to talk about things that they probably wouldn't have had a voice to talk about before."

P4C Lead, EEF intervention school

"Nearly every member of staff has said that children who you wouldn't normally expect to speak in Literacy lessons are."
Teacher, EEF intervention school

"I like how everyone respects each other's opinion. It's quite fair and everyone is allowed their opinion."
Pupil, EEF intervention school

"When the teacher says that it's P4C time, we all cheer, YES!"
Pupil, EEF intervention school

Of the 75 intervention schools, 35 did not implement P4C at the expected level. Of these, six did not implement P4C at all due to other priorities and/or senior leader turnover. The research suggests that it takes time for teachers to become confident with, use and embed the P4C approach and this could have impacted the outcomes. It also suggests that successfully embedding P4C across a school requires a change in whole school ethos and curriculum innovation. SAPERE will consider the findings carefully in order to understand what lessons can be learned about supporting schools further to successfully embed P4C.

The full report is available on the EEF's website at <https://educationendowmentfoundation.org.uk/>.

We are very grateful to the EEF for funding this research.

By participating in this research, SAPERE continues to test and evaluate the public benefit of its programmes and whether its activities are contributing to its mission of advancing the educational, social and personal development of children, young people and others.

1.3.3 Award scheme

SAPERE has an award scheme. The scheme's criteria provide clear progressions for pupils, teachers and schools as a whole through Bronze, Silver and Gold levels. As well as giving schools a valuable road map that they can use to plan and

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review the development of their P4C practice, the programme provides a vital quality assurance tool. Full details of the application process can be found on our website at <https://www.sapere.org.uk/members-schools-partners/school-awards.aspx>.

The trustees decided in 2014-15 to adopt the number of schools progressing through the award levels as the primary measure of SAPERE's performance. If schools are progressing through these levels, we believe that we can be reasonably confident that they are not just undergoing training, but are actually adopting P4C and putting it into practice.

Award submissions and assessments were disrupted this year by the coronavirus pandemic. Teachers were forced to focus on other urgent priorities and did not have time available to complete submissions. This was compounded by the fact that our awards are evidence-based and require evidence of students actively engaging in P4C and of staff taking part in CPD. We know that schools did not completely stop doing either activity in this period, but we were very conscious that we did not want the evidence requirement to become a further burden on already-overstretched staff. For that reason, we supported schools taking part in SAPERE research projects, including the EEF trial, by extending the award submission deadline. If these schools are able to re-open fully to students and resume P4C practice in the classroom in the second part of the 2020-21 academic year, we hope to be able to support them to make their delayed award submissions at that point.

Normally, awards last for three years. In this year's exceptional circumstances and, again, to ease the pressure on schools coming to the end of an award period, it was decided to extend the deadline for renewal or submission at the next award level until the end of the academic year 2020-21. Sixteen schools at Bronze level and one school at Silver level benefited from this extension. As above, we aim to support schools in this position to apply for the next level or renew at their current level as soon as is practicable.

Lastly, with SAPERE staff on furlough, the assessment process took, and is continuing to take, longer than usual, and assessors have been unable to carry out in-school Gold Award assessment visits. Indeed, five Gold Award submissions, including one renewal, were received in early 2020, just before the UK-wide coronavirus restrictions came into force, but their assessment remains on hold while the training team work on the development of a virtual Gold Award assessment process.

Nevertheless, the trustees were pleased to see that, up until the lockdown, the number of award submissions was on a broadly similar trajectory to previous years. The fact that more than 30 schools progressed from Bronze to Silver was particularly pleasing: as noted above, we regard progress through the Awards programme as evidence that schools are fully engaging with and benefiting from P4C. Lastly, we were also delighted to see that, despite the pandemic, some schools were still able to apply for and receive their awards in the latter half of the period.

Notable firsts in this year include the first Gold Award in Scotland, the first Silver Awards in Buckinghamshire, County Durham, Essex, Hertfordshire and North Yorkshire, and the first Bronze Awards in Northumberland, Peterborough and Qatar.

In 2019-20, 63 awards were made: 30 Bronze, including 1 renewal; 32 Silver, including 1 renewal, and 1 Gold. Overall, the numbers of schools at each award level at the end of the period was:

| Award level | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 |
|-------------|---------|---------|---------|---------|---------|
| Bronze | 76 | 114 | 183 | 139 | 137* |
| Silver | 15 | 25 | 38 | 49 | 79* |
| Gold | 8 | 10 | 11 | 17 | 18 |

* For this exceptional year, overall numbers have been calculated by adding new Awards to existing totals. As noted above, 16 Bronze Awards and 1 Silver Award were extended in the latter half of the year. Where a successful application was made at a higher level, the number of awards at the lower level has been reduced accordingly.

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1.3.4 Numbers of schools and teachers trained and number of children reached

Teachers

During the year, SAPERE has trained the following numbers of teachers and trainee teachers:

| Course Type | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 |
|---------------------------------------|---------|---------|---------|---------|---------|
| Level 1 | 4,124 | 4,711 | 4,191 | 2,271 | 2,144 |
| Level 1 ITE* | - | - | - | 325 ** | 258 |
| Level 1+(Tools for Thinking Together) | n/a | 328 | 561 | 1,026 | 153 |
| Level 2A | 332 | 348 | 400 | 219 | 176 |
| Level 2B | - | 97 | 97 | 186 | 40 |
| Level 3The Philosophical Educator | 11 | 21 | 22 | 17 | 18 |
| Totals | 4,467 | 5,505 | 5,271 | 4,044 | 2,789 |

* Prior to 2018 19, ITE delegates were included in the total figure for Level 1

** The figure given here for ITE Level 1s is the total number of trainee teachers who have completed Level 1 training. Many more are introduced to P4C through a minimum five hour introductory unit

Schools and open courses

Teachers and schools may come to SAPERE P4C in a number of ways.

First, in-school training either through our flagship Going for Gold programme of training, consultancy and support or through standalone inset training without an initial commitment to the full Going for Gold programme.

Second, teachers may attend open courses, which are held across the UK and online.

Third, working in partnership with both higher education and school centred initial teacher training providers, we offer an Initial Teacher Education (ITE) programme, whereby trainee teachers have access to a Level 1 course as part of their studies.

The Key Performance Indicators in relation to these paths to P4C training are:

| Number of courses | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | |
|--------------------|---------|---------|---------|---------|----------------------|-------------------------|
| | | | | | September - February | March - August |
| In-school training | 206 | 190 | 230 | 191 | 98 | 3 in-person 4 online |
| Open courses* | 68 | 84 | 30 | 69 | 26 | 0 in-person 9 online |
| ITE courses | - | - | 24 | 19 | 11 | 2 online |

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| Number of Going for Gold Schools** | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 |
|------------------------------------|---------|---------|---------|---------|---------|
| Number of schools on programme | 70 | 146 | 144 | 141 | 85 |

* Figures for Open courses for 2015-16 and 2016-17 include ITE courses which are now listed separately

** Note that some schools go on to join the Going for Gold programme after a standalone inset

The implementation of our training management system, Administrate, in the previous year has this year enabled us to improve the quality of the data we hold on schools. We have reviewed and updated all our Going for Gold records; consequently the number of schools on the programme at the end of the year shows a decrease. This is due both to the fact that 17 schools have now completed their programme of training and support and to the removal of a number of schools which were no longer engaging with the programme. In addition, the pandemic has meant that the number of new sign-ups to the programme has been lower than we might have hoped for, since schools are simply not able to engage with long-term commitments at this point. We hope that the relaunched Going for Gold programme, as discussed in 3.4 below, will be more accessible to schools as they begin to look beyond this extremely challenging period.

Children

We have introduced around 9,200 educators to P4C through our Level 1 course over the last three years. Assuming that each of these people will have facilitated P4C enquiries with at least 20 children, we estimate that at least 184,000 children have been introduced to P4C during this time. This number is in addition to educators who are already trained at or beyond Level 1 and who will also have brought P4C to new classes, as well as continuing their practice with children familiar with P4C.

Summary

The trustees are pleased that, despite only being able to operate normally for six out of twelve months, we were still able to train almost 70% of the number of teachers we trained in the previous year. Indeed, until the Covid-19 pandemic began, SAPERE was on course to deliver more training this year than in the preceding one.

We are also pleased that the development of online training and support has improved our capacity to support schools, including smaller rural and coastal schools, and international schools. Our online offering also permits us to deliver more top-up training to individual teachers joining schools which have previously had whole school training and teachers who are interested in exploring P4C of their own volition. We have been delighted to see positive feedback from delegates on our new online courses, including:

"Alison was great - the online format I thought was really well utilised, and going forward I think more training could be delivered this way as CPD for teachers! It was lovely meeting teachers from all over the UK too. Super and well thought out!"

"Just completed Level 1 and had an amazing experience. The facilitator (Alison Allsopp) was knowledgeable, professional and supportive. Looking forward to introducing P4C into my new setting! Thank you Alison and Julie for your support!"

"The session was informative and engaging. I'm excited to learn more and put this into practice in the future."

"I gained so much from doing this course. It really got me thinking about how to use P4C as a whole pedagogical approach rather than a one off 'extra'. I enjoyed the tasks, the discussion and the materials shared. Alison was fantastic – so thoughtful, friendly and patient. I now just can't wait to use my new learning when schools reopen."

"The content was great and it was wonderful to be able to trial the enquiries. I think it worked really well."

The trustees are grateful to SAPERE's trainers and staff for meeting the challenges of this year with creativity and flexibility. Because of the outstanding commitment and adaptability of the whole team, we were able to move online swiftly and develop new ways of working which prepare SAPERE for the coming years.

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FINANCIAL REVIEW

2.1 Surplus, income and expenditure

The charity is reporting a deficit of £263,268 in the year to 31 August 2020, with total funds carried forward at 31 August 2020 of £111,297. Total income reduced by £326,971 to £435,802, a decrease of 42.8% over the previous year. Expenditure has decreased by £198,045 to £699,070, a decrease of 22.1% over the previous year.

The finances of the charity have been severely impacted by the coronavirus pandemic. The charity's primary income stream is the provision of training to schools. The large-scale closures of educational establishments half-way through the financial year had the effect of reducing income for this period to negligible levels. The reduction in activity did have the result of reducing costs as a large proportion of expenditure is proportional to activity. However, the fixed costs prevented the expenditure decrease from offsetting the fall in income, leading to an increased deficit for the year.

Income from donations is £80,233 and includes the final year of a three year £50,000 contribution from the Golden Bottle Trust and £30,233 from the government's Coronavirus Job Retention Scheme.

Cash at bank and in hand has increased by £61,382 to £593,976. Debtors have decreased by £173,810 to £45,145 as at 31 August 2020, which is largely due to decreased activity as a result of the impact of Covid-19. Creditors have increased by £151,311 to £539,118, primarily due to an increase in deferred income which represents payments made by schools towards their Going for Gold programmes where the activity has not yet been delivered and to training income received from various projects which are still in progress at the year end. It is one of the charity's key objectives to drive the delivery of the Going for Gold programme and reduce the deferred income. In the year, SAPERE has conducted a review of Going for Gold schools to ensure the remaining schools on the programme are engaged.

2.2 The principal sources of funding

The charity has three principal sources of funding:

- training delivered to schools and individuals on a self funded basis
- training delivered to schools within a project funded at least in part by a third party (schools generally fund at least part of the cost) with the third-party funding restricted to the purposes defined by the particular grant agreement
- unrestricted donations

The unrestricted funding from the Golden Bottle Trust has supported the charity's growth and funded the development of the charity's infrastructure as set out in part 3 below, particularly the increase in the number of team members and the introduction of Administrate, an integrated training, learning and customer relationship management system. This income has been vital for the growth of the charity. We are extremely grateful to our principal funders for this unrestricted funding.

A number of restricted income fund projects continue and, in addition, the second research project funded by the EEF was extended until December 2020.

The expected future income from all these sources is considered carefully when planning for and committing to increased support costs.

2.3 Investment policy

As at 31 August 2020, the charity had £593,976 in cash, which represents both the charity's funds and income received in advance. Cash is spread across a number of UK regulated banks to minimise risk. The cash is available on demand from these banks. With the focus on minimising risk and making sure this cash is available, investment returns are relatively low, and no target is set for investment return.

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2.4 Reserves policy

SAPERE's financial position has declined over the last year, with funds carried forward having decreased by £263,268 to £111,297 in the year ended 31 August 2020. The trustees' policy since the 2015-16 financial year has been that unrestricted funds not committed or invested in tangible fixed assets held by the charity should be sufficient at all times to discharge fully the charity's liabilities and allow an orderly wind down. In addition, in 2017-18 the trustees refined the policy to also include a further amount of 5% of budgeted turnover in order to protect against predicted and actual risk of future funding difficulties.

As a result of the coronavirus pandemic, the reserves balance has fallen to below the target level of the trustees' reserves policy. The trustees are now committed to ensure that this reserves balance be increased over time in line with the existing policy. Increasing the reserves balance will require SAPERE to deliver an increased level of activity that enables a surplus to be generated. The trustees have considered that in the current climate this is challenging and it will take potentially several financial years for the reserves to recover to the desired level.

The board of trustees are committed to increase the provision of training, deliver on the existing projects, and pursue fundraising opportunities, taking into account the drop in income from core funders after 2020, with the aim of returning to generating a surplus over the coming financial years.

We continue to think that the policy that unrestricted funds not committed or invested in tangible fixed assets held by the charity should be sufficient to discharge fully the charity's liabilities and allow an orderly wind down is appropriate. In addition, the trustees consider that it is prudent to hold a further amount of 5% of budgeted turnover to protect against the risk of future funding difficulties. This additional amount that has previously been held in reserves has been used to partially offset the funding difficulties experienced in the financial year. The trustees believe that increasing the reserves to hold this additional sum continues to be an appropriate and prudent approach, and will aim to generate this additional sum once the reserves have been increased to the level allowing for a full discharge of liabilities and an orderly wind down.

The current total funds shown in the balance sheet amount to £111,297. Tangible fixed assets amount to £4,872, giving a balance of £106,425. The trustees recognise that the reserves balance may fall further given the extreme funding difficulties and have taken this into account when assessing the charity as a going concern.

2.5 Financial risks and uncertainties

The most significant ongoing risk for the forthcoming year is the impact of Covid-19 on schools and their ability to operate as normal. Furthermore, the financial impact of Covid-19 on schools' budgets has been great, and teachers have little time to undertake CPD due to the demands of smaller class sizes in school and delivering online home learning. Indeed, monies for staff members' continuing professional development is often cut to pay for other essential items. Schools are our main source of income. We continue to invest in customer services, marketing and research to ensure that we are making the case for high quality sustainable P4C.

The trustees confirm that, in view of the forecast future performance and further actions available to the trustees, the charity is a going concern for at least twelve months from the date of approval of the accounts. There is material uncertainty around this assumption. The future income of the charity is dependent on the ability to deliver training to schools; the forecast future performance assumes that this will increase once schools begin to return. The timing of this remains uncertain at the time of signing off the accounts and there is additional uncertainty around the demand for training in schools, particularly given the other priorities they currently face. However, there are existing projects and schools which are committed to the Going for Gold programme, both of which are likely to generate activity once circumstances allow. The new online provision has also proved popular and should enable further training to be provided. The forecast also assumes a reduction in fixed expenditure, the magnitude and timing of which remain uncertain until enacted. On balance and after reviewing all available evidence, the trustees believe the going concern assumption remains valid.

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REVIEW OF ACTIVITIES THROUGH THE YEAR

3.1 Staffing and volunteers

Amelia Foster continued as Chief Executive Officer, Alison Allsopp as National Training Manager, Mary Boullin as Operations and Events Manager, Steve Bramall as P4C Manager, Susan Holding as Going for Gold Project Manager, Naghza Khokhar as Accountant, Kathryn Puncher as Administrative Officer, Jen Simpson as Assistant National Training Manager, Sue Sweetland as Contracts Manager, Clare Woodcock as Communications Manager, and Thomasin Silk as Finance Assistant. Lizzy Lewis was P4C Partnerships Manager until her resignation in August. Lizzy had been with SAPERE since its inception and has been instrumental in the development both of the charity and of the practice of P4C; the trustees are grateful to her for her many valuable contributions over the years. Marina Modric joined the team as a temporary Administrative Officer for a period ending in August. All staff are part time. We are very grateful to the staff for their creative teamwork, commitment, hard work and willingness to go the extra mile every single time.

As noted above, the charity accessed the government's Coronavirus Job Retention Scheme, furloughing a number of staff from April 2020 in order to protect posts. Seven staff remained at work throughout the period.

The trustees would also like to offer their grateful thanks to all those who help in various different ways, often on a voluntary basis. We would like to thank the small team of trainers – Jane Yates, Julie McCann, Maria Prodromou and Kate Halliwell – who supported the initial delivery, review and development of the online Level 1. We are also grateful for the work and constructive feedback from Jane Yates, Julie McCann and Emma Leeson in delivering the first online Level 1 courses for the Welsh Government's Hate Crime in Schools project and for their patience and perseverance in overcoming some of the challenges in delivering this training. We also thank Steve Williams, who was generous with his time and experience in helping to set up the SAPERE Learning Community Forum (see 3.2 below). In normal times, trainers regularly offer their time and support to represent SAPERE at conferences and other events across the UK. Most importantly, trainers have continued – since March 2020 in extremely challenging circumstances – to offer a high standard of training and support to schools and teachers, whether that be in person or online. Trainers who work with EEF or Going for Gold schools have been training and supporting those schools over a sustained period of time, and have continued to do so during the pandemic. We recognise the work and commitment that goes into building lasting relationships with schools and teachers in order to develop and sustain P4C in the longer term, particularly in this difficult year.

3.2 Course and materials development

We have continued to work on the development of our courses, materials, and support programmes.

As part of SAPERE's commitment to quality assurance and our continuing drive towards providing a nationally-recognised, high quality and consistent course to all delegates, we undertook a major piece of work relating to the course content and training requirements for our Level 1 course. This involved the provision to all registered trainers of a revised course description and content map, new course standards, and new SAPERE branded Level 1 essential slides. This work was the culmination of a long-term quality assurance process which began in Autumn 2018 involving peer observations, trainer, participant and mentee feedback and engaging in dialogue and reflection with new and more experienced SAPERE trainers. All registered trainers are expected to ensure that any required updates and changes to their SAPERE Level 1 courses are in place for any courses running after 1st January 2021.

As soon as it became clear that the coronavirus pandemic would mean a pause in face-to-face training, staff began work to adapt our Level 1 course for online delivery. This was a major project, carried out in difficult circumstances and on a tight deadline, and the trustees are grateful to all staff, and in particular to our National Training Manager Alison Allsopp, who worked tirelessly on it. Adapting a course rooted firmly in dialogue and in-person interaction for digital delivery is a huge undertaking, involving the drafting of new requirements and guidelines, a new teaching plan and new slides, as well as selecting stimuli and supporting materials. There is also work required to induct and support trainers to deliver training online, as well as behind-the-scenes work to amend booking and financial processes.

As noted above, online courses allow us to continue to offer training during the coronavirus emergency. They also allow us to extend our training provision to schools which are more remote from the urban centres where our training courses have traditionally run, and allow delegates to join from all around the world. The online model also facilitates easier access to top-

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up training for new staff in schools which have previously had whole school training. Furthermore, delegates and trainers alike have remarked on the possibilities opened up by being able to bring educators together from diverse settings, regions and countries in online communities of enquiry.

Nevertheless, P4C is a practice founded on in-person interaction, dialogue and community-building and we remain committed, in the true spirit of P4C, to resuming face-to-face training as soon as we are able to do so safely.

The Level 2A course content and generic teaching programme has been subject to ongoing review and monitoring for purposes of quality assurance since 2018. This has been carried out through trainer observations, the trainer review and reflection process, and the induction and mentoring of existing Level 1 trainers to Level 2A. The need to adapt the Level 2A course for online delivery has contributed to this process in recent months.

In this period, we undertook a thorough review and revision of the Level 2A Handbook. The updated fourth edition will be available electronically for the new online Level 2A course which will be launched in 2020-21 and will also be used for all future face-to-face Level 2A courses when we are once again able to offer in-person training.

The review and revision of the Level 2B course and materials which commenced in 2018 was progressing with work on course content and delivery. This work was paused in March 2020: further refinements to the course and supporting materials are due post-pandemic alongside consideration of future Level 2B face-to-face and online course offers.

The new format of and content for Level 3 training continued this year, with a fully-booked course running in 2019, with the residential element taking place in October of that year. National coronavirus restrictions meant that the 2020 course had to be postponed: we plan to next offer this training in March 2022.

We reviewed our online Searchable Library of P4C Resources to ensure that we are making available high quality, appropriate and useful resources. We reorganised the collection, updating materials as necessary and adding new content, including resources focusing on subjects such as the pandemic and the Black Lives Matter movement. We also added new resources for families with no experience of P4C who wanted to try out philosophical thinking at home while their children were unable to attend school, as well as resources for teaching staff with no P4C training but who wanted to try it out and for more experienced P4C practitioners. The updated collection includes activities to get children involved in speaking and listening, and working as a community; tips and advice to help facilitators manage conversations, create a thoughtful space, build a supportive and challenging community, and develop questioning; and stimuli for enquiries, including thought-provoking stories, images, videos, poems and picture books, and some suggested one-hour lesson plans. From April 2020 until the end of the academic year, we distributed a weekly resources email, under the banner of #PhilosophyFriday, reaching at least 3,500 people each week. The Library is accessed via the SAPERE website.

A major piece of work was undertaken to review the Going for Gold programme, which provides a structured approach to P4C training and support over a three year period to help schools develop and sustain high quality practice. Schools were previously required to sign up to the full three-year programme from the outset. However, senior leaders are increasingly reluctant to sign up to this length of undertaking which also requires a substantial financial commitment. In addition, a school's priorities can undergo significant change within three years – be that due to a change in governance (for example, being taken over by an academy chain), a new head teacher, high staff turnover, or a change in Ofsted grading. The revised programme now offers schools the options of purchasing each year of training and support in blocks of one year – Going for Bronze, Going for Silver or Going for Gold – which offers maximum flexibility to schools whilst maintaining our aim of delivering high quality, sustainable P4C.

Until schools closed, we were continuing to develop training packages for multi academy trusts and groups and federations of schools, such as that developed for the second year of our work with the Voice North of Tyne project involving more than 20 schools in north east England, the Central RSA Academies Trust in Birmingham and the Sola Fide Church of England Trust in Greater Manchester. This work will resume once SAPERE and schools are in a position to re-start it.

As part of our strategic commitment to building an inclusive culture, we had planned to once again offer a SAPERE bursary to cover all costs (including tuition, accommodation and catering) for a place on the 2020 Level 3 course. We hope to resume this programme as soon as we are able to run a Level 3 course.

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The SAPERE Learning Community (SLC) was launched to facilitate ongoing professional dialogue about P4C theory and practice; to help trainers, practitioners and others contribute to the development of the practice of P4C; and to raise the public profile of and amplify the voice and influence of SAPERE P4C. The SLC programme includes events around the UK to build relationships and to reflect on and innovate models and practices, as well as internal and external conferences to celebrate and inspire P4C practice and influence educational policy and practice.

A full programme of SLC and trainer CPD events was scheduled to run during the academic year but many events had to be postponed. We were able to run our trainer days focusing on unconscious bias and a number of online CPD sessions for trainers (see 3.4 below). We organised two well-attended SLC symposia: one, entitled 'P4C: Special Goods and the Public Good', took place in Sheffield and one, entitled 'The P in P4C: Philosophical Dimensions of a Practice', took place in London. A third symposium, 'Innovating P4C: Ideas, Resources and Experiments', scheduled for the Midlands in April, had to be cancelled, as did a planned residential writing retreat.

An online forum for the SLC was launched in April 2020 to provide a space for P4C practitioners – initially SAPERE trainers – to talk together, discuss ideas, collaborate and develop practice. Trainers use the forum to engage online in informal coffee morning-type meetings, for collaborative thinking, and for P4C enquiries. A weekly enquiry organised by trainer Topsy Page continues to run. The trustees are pleased to see trainers coming together through the SLC and are grateful for their engagement and work to develop the practice of P4C.

Initial discussions have begun about the launch of an online P4C practice journal.

3.3 Organisational and administrative matters

We were fortunate that the charity was already well set up to operate effectively with staff working remotely (indeed, a number of the team have been doing so for many years). Staff who had previously worked from the office in Culham began working from home a full week before national restrictions came into force. We immediately started work to downsize our office and to dispose of fully depreciated assets that were no longer needed, with a view to becoming a fully virtual organisation. This was completed with the closure of our Culham office in December 2020.

In response to the demands of the national emergency, some roles shifted, for example, to accommodate online training and to support additional fundraising. The trustees have reviewed – and continue to keep under review – the structure of the organisation and are focused on the best way to ensure a viable future for SAPERE after a long and continuing period of severely restricted income.

We have strengthened our capability to deliver online training and support by utilising the capacity of our training management system, Administrate, to integrate with the online video communications platform, Zoom.

We carried out an interim design-focused update of our website to improve its look and feel in the short term. We also commenced working on a larger project to fully overhaul the website, including improvements to navigation, functionality, content and design, as well as a much-improved integration with Administrate. This should significantly improve our delegates' booking experience, drive increased sales and give us an opportunity to fully communicate our standing as the UK's national charity for P4C, as well as the transformative nature of P4C.

In line with one of our strategic objectives, we have continued to focus on anti-racism work, including planning a programme of activity for staff, trustees and trainers to be carried out in 2020-21.

Partnerships with external organisations

We have continued to partner with like-minded organisations to extend the reach and impact of P4C. During the year we have collaborated with:

- The Fair Education Alliance
- Humanities 20:20
- Inspire Education

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- P4C.com
- Values Based Education
- Voice21 and the Oracy Network
- VotesforSchools

In September 2019 we submitted evidence to the All-Party Parliamentary Group on Oracy's Speak for Change Inquiry into the state of oracy education in UK schools.

In November 2019, the P4C Manager and the Chief Executive were invited to speak at the Philosophy in Schools: Enriched Curriculum, Enriched Lives conference, which was organised by the Centre for Engaged Philosophy at the University of Sheffield. The event focused on practical and affordable mechanisms through which philosophy can be integrated into the UK curriculum, supporting school efforts to enrich educational experiences and better respond to the evolving regulatory environment.

3.4 Quality Assurance

SAPERE holds itself accountable for ensuring excellent delivery of P4C training and support services in schools, colleges and communities.

In this period, SAPERE submitted a portfolio of evidence for the first cycle of a CPD Quality Assurance pilot study for the Teacher Development Trust (TDT), in collaboration with the Chartered College of Teaching and Sheffield Hallam Institute of Education who have confirmed that SAPERE "has appropriate systems and processes which are used to monitor and evaluate the quality and effectiveness of their CPD programmes, facilitators and materials".

In the future, we will continue to work with the TDT to provide further evidence for our portfolio and to strengthen this important external accreditation of SAPERE's high quality CPD offer across our training pathway.

In-house quality assurance processes and procedures – including trainer reviews, observations, monitoring of course programmes and participant evaluations – continue to be in place for all courses, including the new online Level 1.

Training courses and materials

SAPERE's Professional Standards Board (PSB) exists to ensure that our courses, course materials and training are quality assured, rigorous, fit for purpose and reflect our mission; and that SAPERE registered trainers have the delivery and content of their training quality assured in order that their courses are rigorous, fit for purpose and reflect our values, vision and mission.

It does this by:

- approving the content of new and updated courses and course materials before recommending them to the trustees for final approval
- approving changes and updates to the trainer pathway before recommending them to the trustees for final approval
- advising the trustees as to the quality assurance of SAPERE's trainers and course delivery, and the content of SAPERE's courses and materials

Its membership is comprised of trustees and trainers, with the latter paid to serve on the PSB to ensure that a diverse range of voices can be heard. The PSB met twice during 2019-20 and has, where required, vetted and approved developments in course content, materials and delivery.

Trainer CPD

All SAPERE trainers undergo an extensive programme of training and mentoring before they can be accredited to deliver our training. SAPERE assures the quality of courses and other support by:

- specifying the pathway via which individuals become registered SAPERE trainers
- maintaining a register of trainers that identifies their expertise to deliver different levels of courses

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- monitoring provision through a system of professional review and evaluation administered by the SAPERE office and supervised by the PSB
- setting out the criteria – such as age specific or subject area expertise, or experience of leading programmes of training and support in schools – by which trainers are selected for particular roles
- ensuring that trainers have up-to-date DBS checks and understanding of our safeguarding procedures

This year, trainer CPD has focused predominantly on training workshops on unconscious bias and on induction for the online Level 1 training. Our regular calendar of CPD for trainers was, however, disrupted by the pandemic. We have nevertheless continued to support trainers to support their Going for Gold and project schools to continue with P4C during the pandemic. This support has been offered on both a one-to-one and on a group basis.

Schools

As set out above, the central component underpinning all our programmes is the SAPERE award scheme, which provides clear progressions for pupils, teachers and schools as a whole through Bronze, Silver and Gold Award levels. As well as being a vital quality assurance tool, the award framework gives schools a valuable road map that they can use to plan for and review their progress in P4C at each stage of their school's development.

3.5 Projects and Programmes

The **EEF Effectiveness Trial**, which commenced in 2017, has continued throughout this year and, as noted in 1.3.2 above, had been due to conclude at the end of the period under review.

The closure of schools in March 2020 significantly disrupted the delivery of training and support, and the submission of awards. In the latter stage of the project and, as noted above, the deadline for the project was extended to the end of December 2020.

A project to deliver the Going for Gold programme in 13 schools in North Yorkshire, funded by the **Peter Sowerby Foundation**, came to an end during this period. The project targeted small rural schools which face disadvantages particular to their size and location. Each project school engaged in a full Foundation Level 1 course with SAPERE and, over the course of the project, top-up courses were offered to new staff to ensure a good level of qualified P4C practitioners within each school. In this period, we were able to offer our new online Level 1 course as top-ups from July 2020. All of the active project schools achieved their Bronze Level Award during the life of the project, with the first project school achieving Silver in this period. The evidence from the award applications demonstrates some excellent and creative P4C practice with pupils engaging in collaborative activities, developing questioning skills and exploring concepts within different curriculum topics and subjects. The project includes a research stream to assess the effectiveness of this delivery model, which is being conducted by Durham University's School of Education. The results are expected to be published in the first quarter of 2021.

During this period SAPERE was approached by the Welsh Local Government Authority to become a partner in the **Welsh Government's Hate Crime in Schools** project. SAPERE was commissioned to offer a P4C Level 1 training strand, as part of a larger project delivered in collaboration with other stakeholders (including the Welsh Local Government Authority, NEWREN, Race Council Cymru, Race Equality First and Show Racism the Red Card). The aim of the P4C strand is to train teachers and other key school staff in the P4C approach, which will support them in starting to facilitate conversations around challenging topics such as hate crime. Our Level 1 training is supported by a SAPERE Getting Started with P4C, Wales Resource Pack. The project will be assessed by means of pre- and post-course surveys of teachers and school staff taking part in the training.

SAPERE made a successful bid to the **Templeton World Charity Foundation** to run a project in secondary schools entitled 'Using SAPERE P4C to think together in science and RE', as part of the Foundation's Big Questions in Classrooms initiative. SAPERE's project is designed to run over a three-year period in six secondary schools, working with the science and RE departments in each, bringing them together to train and plan with each other. It aims to enable year 9 and 10 teachers and students to reveal and explore the philosophical dimensions of RE and science. Stimuli for enquiry will be selected to encourage cross-curricular thinking and conceptual analysis, and to draw out the ways in which thinking differs in the two subjects, as well as finding areas of commonality. Students will be encouraged to use knowledge from each

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subject to think about the concepts and questions they are exploring. The project is structured around the SAPERE award scheme for schools and will use adapted courses and tailored support to build teachers' confidence in utilising the pedagogy. The three-year plan is an adapted version of our Going for Gold programme.

As originally conceived, work on the project had been due to commence in early 2020, with training beginning in schools in April. However, the closure of schools in March 2020 meant that the project has had to be put on hold and, depending on how the national picture evolves, may require re-structuring. In the meantime, we are immensely grateful to the Templeton World Charity Foundation for their ongoing support.

SAPERE's primary focus for fundraising in the current year has been on the charity's continued viability during the pandemic, and for targeted work in, for example, secondary schools, the Early Years Foundation Stage and Alternative Provision. A number of fundraising applications for projects beginning in 2021 were worked on during this year. The trustees wish to record their thanks to our two fundraising volunteers, Enting Lee and Isla Yu, whose work to identify possible funders made many of these applications possible. We are also grateful to our funders for supporting the above listed programmes.

3.6 Membership

Membership numbers remained broadly stable at around 150. Member benefits include a regular email update containing P4C news, events and resources, preferential terms for SAPERE events, and the right to vote at our AGM. Membership fees are also a valuable support for the organisation, and we are grateful to our members for their contribution. In addition to our members, we have around 4,300 subscribers who have signed up to receive our news updates.

We remain committed to considering how best to support our members, with the aim of providing a more attractive membership package and creating a stronger community of members who, we hope, can act as advocates for SAPERE and for P4C. However, this work remains on hold during the pandemic while we are not able to devote adequate resource to it.

3.7 Trainers and training activity

As discussed above, SAPERE was able to run almost 70%* of the training delivered in the previous financial year during this extremely challenging period. In total, we delivered 153 courses across all our levels of training, despite having to cancel all face-to-face training from March 2020 and with our online Level 1 course only coming on-stream for the last three months of the academic year.

SAPERE's network of trainers is its most important single resource. During the year we had 61 accredited trainers, including one newly registered Level 1 trainer. With the cancellation of all in-person training from March 2020, our trainer pathway has been significantly disrupted. Maintaining the capacity and quality of our trainer base remains an important task for the organisation.

3.8 International

SAPERE's policy on working internationally can be found on our website at <https://www.sapere.org.uk/about-sapere/international-policy.aspx>. The policy aims to keep SAPERE open to international work while balancing the potential risks of such work with the opportunities it can also offer.

* Measured by the number of teachers trained.

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PLANS FOR FUTURE PERIODS

4.1 Our strategic objectives for the period to end 2020

In the first six months of 2019-2020, we were progressing with our strategic plan. Our strategic objectives for the remainder of the current five year plan (that is, for the period to the end of 2020) were to:

1. develop SAPERE P4C to keep it brand leading, relevant and targeted at schools that support areas of disadvantage; in particular, develop a robust model for P4C in secondary schools
2. continue to address both the sustainability of P4C in educational settings and the sustainability of SAPERE as the leading P4C organisation in the UK through development, research and marketing, and by prioritising diversity and inclusion
3. develop and deepen our engagement with the trainer community, in particular through the development of a learning community

The impact of the pandemic meant that, from March 2020, much of our focus was on priority two, with a particular emphasis on ensuring the continued provision of training and support to schools and on the financial sustainability of SAPERE. We also remained committed to our work on anti-racism: we are conscious that is imperative, in the current and post-Covid-19 world, to better understand power relations, to question beliefs and assumptions, and to make better decisions with courageous compassion.

Actions taken during this time included:

- developing, piloting and delivering a very successful online Level 1 course
- offering weekly #PhilosophyFriday resources to support parents engage in dialogue at home, and teachers – whether facilitating P4C online to remote students, or in the classroom with key worker and vulnerable children
- supporting trainers in utilising Zoom technology to deliver our courses online
- undertaking an interim revamp of our website, and appointing web designers to develop a new fit-for-purpose website to ensure we can support online delivery
- revamping Going for Gold into three one-year packages designed to be more affordable and flexible for schools
- continuing our work on anti-racism to ensure SAPERE becomes an organisation that reflects and acts on instances of systemic racism within it in order to be equitable and promote equity
- planning for and submitting fundraising applications for projects in the areas of
 - o mental health and well-being
 - o pupil referral units
 - o community dialogue
 - o bursaries for teachers from under-represented groups and in areas of disadvantage
 - o creativity – outdoor learning, museums and galleries
 - o climate change
 - o global education
- planning for approaches to high net worth and ultra-high net worth individuals to generate unrestricted income
- carrying out fortnightly cashflow modelling to ensure SAPERE could keep functioning while earning little to no income
- utilising government support schemes when applicable to support the charity's finances
- moving to a cloud-based server and accounting package to allow us to become fully virtual
- downsizing our office space to reduce fixed costs

Towards the end of the period, our five-year plan was up for review and we began a strategy consultation, including an online workshop day for staff and trustees, and a written consultation with trainers.

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4.2 Plans for future periods

We will restructure the organisation to further reduce our fixed costs to ensure that that we are able to operate should school closures continue and our income continues to be severely reduced.

SAPERE will also continue to deepen our online P4C offer by offering an online Level 2A course, as well as P4C in Practice seminars to support teachers in schools who have limited time or budget for CPD.

We will intensify our fundraising efforts to ensure that those most in need of P4C will have the opportunity to participate in it.

We will advocate for the importance of SAPERE P4C by developing our research capability and through advocacy. SAPERE P4C is a transformative pedagogy that challenges the current educational focus on high-stakes testing; it values children's thoughts, feelings and lived experiences, and helps them to use these to think more deeply, building on their natural curiosity and wonder about the world around them. It builds their capability to learn from and listen to others with different opinions, and to engage with their own thoughts and feelings about the world around them. It is vital therefore that we advocate for P4C to be part of educational reform – a chance to 'build back better' after Covid-19 and to ensure that children and young people have their mental health and well-being supported and their voices heard.

Finally, and critically, we will continue our strategic planning, in order to develop a three-year strategy for SAPERE. This will pick up from the work started in 2019-2020 and will proceed as follows:

- an open dialogue on the SAPERE Learning Community for trainers – reviewing and discussing SAPERE's purpose, vision, mission and values
- the creation of a working party to develop strategic objectives based on the outcome of the initial dialogues
- the development of a three-year plan, taking into account the challenges and changes ahead caused by the impact of the pandemic on the education sector and on children and young people themselves

STRUCTURE, GOVERNANCE AND MANAGEMENT

5.1 The constitution and the board of trustees

The charity is incorporated as a company limited by guarantee. The governing documents are the memorandum and articles of association.

The charity has a board of up to ten trustees/directors who meet a minimum of four times per year and are responsible for the strategic direction, policy and oversight of the charity. The trustees have a variety of professional backgrounds relevant to the work of the charity.

There are also a number of standing subcommittees formed of trustees and staff. At the July meeting of trustees, when we would ordinarily review our governance, we reviewed and restructured our committees. The standing subcommittees are now Finance, Risk and Governance; Fundraising and Communications; Personnel; and P4C, Trainers and Training. Ad hoc subcommittees are also formed as necessary to address specific issues.

Trustees must retire and stand for re election every three years. The articles of association provide for at least seven trustees to be elected at the AGM, and a further three trustees to be appointed, if appropriate, by the trustees. Trustees elected at the AGM must be recommended for election by the trustees or nominated by two members.

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5.2 Governance aims

The trustees have had a number of key governance aims during this period:

- to review the composition and practices of the board of trustees and ensure that they are in line with current legislation and best practice
- to review and manage the financial impacts on the charity during the challenging operating circumstances over the year
- to continually review and plan for the future, taking into account potential risks and uncertainty with a particular focus on ensuring the charity remains a going concern
- to ensure the charity follows all elements of applicable laws and charity regulation, particularly around government support schemes and actions taken as a result of the coronavirus pandemic
- to continue to update SAPERE's administration, management information, website, and accounting systems and practices
- to assist the flow of information and pursuit of the board's strategy including by attendance of trustees at events such as trainer days, conferences, consultation meetings and PSB meetings as well as new P4C offers such as the new online courses
- to increase inclusion and diversity throughout the organisation
- to continue to improve the organisation's safeguarding practices

We believe that the current board has a good balance and range of skills and experience and that this supports the charity effectively. We are however mindful of the need for a board to continue to be open to new talent. Three trustees, including the Chair, resigned at the March 2020 AGM. The vice-chair, who has a wealth of experience in financial planning, operations, board reporting and management information, took over as Chair at the AGM. The board conducted an open recruitment exercise to find three new trustees with relevant expertise and were delighted to be able to appoint new trustees with significant legal, fundraising and governance experience. One trustee stood down in July.

Trustees have overseen changes necessary to keep SAPERE resilient during the pandemic in the second half of the year. New terms of reference for the board's subcommittees were drawn up to make the board more agile and better able to respond to the fast-moving environment created by the pandemic. We have also conducted a strategy review of the last 5 years and started a new strategic development cycle. We circulated a questionnaire to trainers about the purpose of SAPERE and will continue our consultations with stakeholders in the coming year.

Trustees have all engaged in safeguarding training, and the lead on safeguarding has attended courses suitable for the role. The board continues to develop the organisation's safeguarding policies and practices.

5.3 Trustee induction and training

All new trustees are required to meet with the Chief Executive, Chair and existing trustees to understand the ethos of the charity and their responsibilities, to learn about the aims and objectives of the charity and to have an opportunity to ask questions. All new trustees are also invited to meet the staff and to attend courses and conferences run by the charity.

The Chair and Chief Executive ensure that all new trustees are furnished with key governance documents, including the Constitution, Annual Report and Financial Policies, and other relevant documents. These are supplemented with booklets from the Charity Commission that outline general trustee responsibilities.

In addition, if any trustee has any specific responsibilities they are supported by the Chief Executive, existing trustees and staff to ensure they have sufficient knowledge and skills.

THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

(A company limited by guarantee)

TRUSTEES' REPORT (CONTINUED) FOR THE YEAR ENDED 31 AUGUST 2020

The trustees who served during the year were as follows:-

Daniel Baltzer (till 06/03/20)
 Alison Barne
 Kay Chapman (from 06/03/20)
 Jeannie Cohen
 Rod Cunningham
 Jerrina Eteen (till 06/03/20)
 Elizabeth Jones (till 06/03/20)
 Finia Kuhlmann (from 06/03/20)
 Jack Langley (Treasurer)
 Ivana Mahendra (Chair) (from 06/03/20)
 Georgina Pattison Brusik (from 06/03/20)
 Catrin Rees (till 10/10/20)
 Paul Stockley

5.4 Risk management

The trustees and Chief Executive have prepared a risk register of the major risks to all areas of the charity and this is reviewed and updated each year. Mitigations to these risks are identified and implemented; these mitigations include updated procedures, systems, processes and controls. Management updates include key risks which are discussed at board meetings and discussions about new risks arising from the unfolding Covid-19 emergency took place at every trustee meeting in 2020.

The trustees and the Chief Executive have continued to ensure that financial controls are in place. We reviewed these areas as part of the preparation for and process of the independent examination.

The most significant ongoing risk for the forthcoming year is the continuation of the Covid-19 pandemic. As well as reducing and (post year-end) getting rid of our office space, we have systematically reduced all our fixed costs. We will also restructure the organisation to reduce costs further. The further development of our online offer, our fundraising efforts and our careful financial management, as well as the drawing down of a Government Bounce Back Loan (in the 2020-21 year), are part of our financial risk management.

The charity relies on projects and grants or donations to help cover overheads, and the expected future income from these sources is considered carefully when reviewing overhead levels and commitments. This income is considered sufficient for the next financial year and a Going Concern plan has been prepared to support the charity through at least the next 12 months, of which many will still be affected by the pandemic.

The charity has a safeguarding policy that is reviewed and circulated annually to all trainers and staff. The charity's Chief Executive is responsible for the maintenance of this policy, and one trustee (Alison Barne) is the lead safeguarding trustee. All trainers and staff who have direct contact with children are required to have up-to-date Disclosure and Barring Service (DBS) checks. The health and safety policy was reviewed and updated.

5.5 Management and staff

A scheme of delegation is in place and day to day responsibility for the provision of the services rests with the Chief Executive supported by the staff of the charity. The Chief Executive is responsible for ensuring that the charity delivers the services specified, key performance indicators are met, and a comprehensive report is provided for each board meeting.

5.6 Key management personnel remuneration

The trustees consider the board of trustees and the Chief Executive as comprising the key management personnel of the charity in charge of directing and controlling the charity and running and operating the charity on a day to day basis.

All trustees give of their time freely and no trustee remuneration was paid in the year for acting as a trustee. Two trustees

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TRUSTEES' REPORT (CONTINUED) FOR THE YEAR ENDED 31 AUGUST 2020

are also trainers, and have been remunerated for their work as trainers in accordance with SAPERE's terms and conditions applicable to all trainers. The articles of SAPERE permit trustees to enter into a contract for the provision of services under certain circumstances provided for in the articles. The trustees have considered the issue of having trainers as trustees and were satisfied that it would be in the best interests of the charity for the services to be provided by those trainers who are also trustees, because it is of great benefit to the charity to have trustees who are directly involved in the delivery of training and who can bring that expertise to the board. The trustees are satisfied that the arrangements comply with sections 185 - 188 of the Charities Act 2011.

Details of trustee expenses and related party transactions are disclosed in notes 11 and 24 to the accounts.

Trustees are required to disclose all relevant interests and register them with the Chief Executive and, in accordance with SAPERE's constitution and policy, must withdraw from decisions where a conflict of interest arises.

The pay of the charity's Chief Executive is reviewed annually and normally increased in accordance with average earnings. The remuneration is benchmarked with that paid by charities of a similar size and activity to ensure that the remuneration set is fair and not out of line with that generally paid for similar roles.

TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS

The charity trustees are responsible for preparing a trustees' annual report and financial statements in accordance with applicable law, the charity's memorandum and articles of association, 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) (second edition, effective 1 January 2019).

The law applicable to charitable companies in England and Wales requires the charity trustees (directors) to prepare financial statements for each year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing the financial statements, the trustees (directors) are required to:

- select suitable accounting policies and then apply them consistently
- observe the methods and principles in the applicable Charities SORP
- make judgements and estimates that are reasonable and prudent
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Companies Act 2006, the applicable Charities (Accounts and Reports) Regulations, and the provisions of the Articles of the charity. They are also responsible for safeguarding the assets of the charity and taking reasonable steps for the prevention and detection of fraud and other irregularities.

THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

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TRUSTEES' REPORT (CONTINUED) FOR THE YEAR ENDED 31 AUGUST 2020

The trustees are responsible for the maintenance and integrity of the charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

Small companies note

In preparing this report, the trustees have taken advantage of the small companies exemptions provided by section 415A of the Companies Act 2006

This report was approved by the trustees, in their capacity as directors, and signed on their behalf by:

Ivana Mahendra

.....
Ivana Mahendra, Chair
Date: 18 March 2021

THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

(A company limited by guarantee)

MENZIES
BRIGHTER THINKING

INDEPENDENT EXAMINER'S REPORT

Independent examiner's report to the Trustees of The Society for the Advancement of Philosophical Enquiry and Reflection in Education ('the Company')

I report to the charity Trustees on my examination of the accounts of the Company for the year ended 31 August 2020.

Responsibilities and basis of report

As the Trustees of the Company (and 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 the Company's accounts 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 the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I 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, other than those fully detailed below, have come to my attention in connection with the examination giving me reasonable cause to believe that in any material respect:

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 confirm that there are no other matters to which your attention should be drawn to enable a proper understanding of the accounts to be reached.

Disclosure section

I draw attention to the wording contained in the Financial Risks and Uncertainties section of the Trustees' Report and the going concern accounting policy at Note 2.2 which explain the impact of the Coronavirus pandemic on the charity's activities and on future activities together with the trustees' view on going concern. As stated in Note 2.2, this indicates that a material uncertainty exists that may cast doubt on the charity's ability to continue as a going concern.

THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

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INDEPENDENT EXAMINER'S REPORT FOR THE YEAR ENDED 31 AUGUST 2020

This report is made solely to the Company's Trustees, as a body, in accordance with Part 4 of the Charities (Accounts and Reports) Regulations 2008. My work has been undertaken so that I might state to the Company's Trustees those matters I am required to state to them in an Independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Company and the Company's Trustees as a body, for my work or for this report.

Signed: *Malcolm Lucas*

Dated: 25-Mar-2021

Malcolm Lucas FCA

Menzies LLP

Chartered Accountants

Centrum House

36 Station Road

Egham

Surrey

TW20 9LF

THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

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STATEMENT OF FINANCIAL ACTIVITIES (INCORPORATING INCOME AND EXPENDITURE ACCOUNT) FOR THE YEAR ENDED 31 AUGUST 2020

| | Note | Unrestricted funds 2020 £ | Restricted funds 2020 £ | Total funds 2020 £ | Total funds 2019 £ |
|------------------------------------|------|------------------------------------|----------------------------------|-----------------------------|-----------------------------|
| Income from: | | | | | |
| Donations and legacies | 3 | 80,283 | - | 80,283 | 125,000 |
| Charitable activities | 4 | 258,180 | 94,988 | 353,168 | 635,883 |
| Investments | 5 | 2,351 | - | 2,351 | 1,890 |
| Total income | | 340,814 | 94,988 | 435,802 | 762,773 |
| Expenditure on: | | | | | |
| Charitable activities | 6 | 604,082 | 94,988 | 699,070 | 897,115 |
| Total expenditure | | 604,082 | 94,988 | 699,070 | 897,115 |
| Net movement in funds | | (263,268) | - | (263,268) | (134,342) |
| Reconciliation of funds: | | | | | |
| Total funds brought forward | | 374,565 | - | 374,565 | 508,907 |
| Net movement in funds | | (263,268) | - | (263,268) | (134,342) |
| Total funds carried forward | | 111,297 | - | 111,297 | 374,565 |

The Statement of financial activities includes all gains and losses recognised in the year.

The notes on pages 28 to 42 form part of these financial statements.

THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

(A company limited by guarantee)

REGISTERED NUMBER: 7821030

BALANCE SHEET AS AT 31 AUGUST 2020

| | Note | 2020 £ | 2019 £ |
|---|------|-----------------------|-----------------------|
| Fixed assets | | | |
| Intangible assets | 11 | 6,467 | - |
| Tangible assets | 12 | 4,827 | 9,911 |
| | | <u>11,294</u> | <u>9,911</u> |
| Current assets | | | |
| Stocks | 13 | - | 913 |
| Debtors | 14 | 45,145 | 218,955 |
| Cash at bank and in hand | | 593,976 | 532,594 |
| | | <u>639,121</u> | <u>752,462</u> |
| Creditors: amounts falling due within one year | 15 | (366,135) | (333,051) |
| Net current assets | | <u>272,986</u> | <u>419,411</u> |
| Total assets less current liabilities | | <u>284,280</u> | <u>429,322</u> |
| Creditors: amounts falling due after more than one year | 16 | (172,983) | (54,757) |
| Net assets | | <u>111,297</u> | <u>374,565</u> |
| Total net assets | | <u><u>111,297</u></u> | <u><u>374,565</u></u> |
| Charity funds | | | |
| Restricted funds | 17 | - | - |
| Unrestricted funds | 17 | 111,297 | 374,565 |
| Total funds | | <u><u>111,297</u></u> | <u><u>374,565</u></u> |

The Company was entitled to exemption from audit under section 477 of the Companies Act 2006.

The members have not required the company to obtain an audit for the year in question in accordance with section 476 of Companies Act 2006.

The Trustees acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and preparation of financial statements.

THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

(A company limited by guarantee)

BALANCE SHEET (CONTINUED) AS AT 31 AUGUST 2020

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

The financial statements were approved and authorised for issue by the Trustees and signed on their behalf by:

Ivana Mahendra

.....
Ivana Mahendra

Date: 18 March 2021

The notes on pages 28 to 42 form part of these financial statements.

THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

(A company limited by guarantee)

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

1. General information

The charity is a private company limited by guarantee, registered in England and Wales and a registered charity in England and Wales. The address of the registered office is Centrum House, Station Road, Egham, England, TW20 9LF. The members of the company are those persons whose names are contained in the register of members. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity.

2. Accounting policies

2.1 Basis of preparation of financial statements

The financial statements 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), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

The Society for the Advancement of Philosophical Enquiry and Reflection in Education meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy.

The financial statements have been prepared in sterling, which is the functional currency of the entity and have been rounded to the nearest £.

2.2 Going concern

The Coronavirus pandemic has had a significant impact on the education sector and on the activities of the charity. The trustees have therefore taken action to move activities to an online basis and to control costs where appropriate. Projections and forecasts have been prepared showing the charity returning to normal levels of activity and remaining cash positive. Given the actions that have been taken, it is the trustees opinion that the going concern basis of preparation of the accounts continues to be appropriate. Nevertheless because of the uncertainty over the duration of the pandemic and when the education sector will recover there remains a material uncertainty over the ability of the charity to continue as a going concern.

THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

2. Accounting policies (continued)

2.3 Income

All income is recognised once the charity has entitlement to the income, and it is probable that the income will be received, and that the amount of income receivable can be measured reliably. The following specific policies are applied to particular categories of income:

Income from donations or grants is recognised when there is evidence of entitlement to the gift, receipt is probable and its amount can be measured reliably.

No amounts are included for the contribution of general volunteers.

Income from contracts for the supply of services is recognised with the delivery of the contracted service. This is classified as unrestricted funds unless there is a contractual requirement for it to be spent on a particular purpose and returned if unspent, in which case it may be regarded as restricted.

Grants are included in the Statement of financial activities on a receivable basis. The balance of income received for specific purposes but not expended during the period is shown in the relevant funds on the Balance sheet. Where income is received in advance of entitlement of receipt, its recognition is deferred and included in creditors as deferred income. Where entitlement occurs before income is received, the income is accrued.

Government grants received as a result of the Coronavirus Job Retention scheme are recognised as income when the charity is entitled to the money.

2.4 Expenditure

Expenditure is recognised once there is a legal or constructive obligation to transfer economic benefit to a third party, and 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 includes any VAT which cannot be fully recovered, and is classified by activity. The costs of each activity are made up of the total of direct costs and shared costs, including support costs involved in undertaking each activity. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs which contribute to more than one activity and support costs which are not attributable to a single activity are apportioned between those activities on a basis consistent with the use of resources. Central staff costs are allocated on the basis of time spent, and depreciation charges allocated on the portion of the asset's use.

Support costs are those costs incurred directly in support of expenditure on the objects of the charity and include project management carried out at Headquarters.

Charitable activities and Governance costs are costs incurred on the charity's operations, including support costs and costs relating to the governance of the charity apportioned to charitable activities.

Staff salaries are allocated between restricted and unrestricted funds on the basis of time spent. Other costs are allocated on a pro-rata basis based on income.

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

2. Accounting policies (continued)

2.5 Intangible assets and amortisation

Intangible assets costing £500 or more are capitalised and recognised when future economic benefits are probable and the cost or value of the asset can be measured reliably.

Intangible assets are initially recognised at cost. After recognition, under the cost model, intangible assets are measured at cost less any accumulated amortisation and any accumulated impairment losses.

Amortisation is provided on intangible assets at rates calculated to write off the cost of each asset on a straight-line basis over its expected useful life.

Amortisation is provided on the following basis:

| | | |
|----------------------|---|-----|
| Website and Database | - | 25% |
|----------------------|---|-----|

2.6 Tangible fixed assets and depreciation

Tangible fixed assets costing £145 or more are capitalised and recognised when future economic benefits are probable and the cost or value of the asset can be measured reliably.

Tangible fixed assets are initially recognised at cost. After recognition, under the cost model, tangible fixed assets are measured at cost less accumulated depreciation and any accumulated impairment losses. All costs incurred to bring a tangible fixed asset into its intended working condition should be included in the measurement of cost.

Depreciation is charged so as to allocate the cost of tangible fixed assets less their residual value over their estimated useful lives, using the straight-line method.

Depreciation is provided on the following basis:

| | | |
|-----------|---|-----|
| Equipment | - | 25% |
|-----------|---|-----|

2.7 Stocks

Stocks are valued at the lower of cost and net realisable value after making due allowance for obsolete and slow-moving stocks. Cost includes all direct costs and an appropriate proportion of fixed and variable overheads.

2.8 Liabilities and provisions

Liabilities are recognised when there is an obligation at the Balance sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably.

Liabilities are recognised at the amount that the Company anticipates it will pay to settle the debt or the amount it has received as advanced payments for the goods or services it must provide.

Provisions are measured at the best estimate of the amounts required to settle the obligation. Where the effect of the time value of money is material, the provision is based on the present value of those amounts, discounted at the pre-tax discount rate that reflects the risks specific to the liability. The unwinding of the discount is recognised in the Statement of financial activities as a finance cost.

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

2. Accounting policies (continued)

2.9 Financial instruments

The Company only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value with the exception of bank loans which are subsequently measured at amortised cost using the effective interest method.

2.10 Critical accounting estimates and areas of judgment

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the amounts reported. These estimates and judgements are continually reviewed and are based on experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances.

In the opinion of the trustees there are no significant estimates or areas of judgement that would have a material impact on the financial statements.

2.11 Pensions

The Company operates a defined contribution pension scheme and the pension charge represents the amounts payable by the Company to the fund in respect of the year.

2.12 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the Company and which have not been designated for other purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the Company for particular purposes. The costs of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

Investment income, gains and losses are allocated to the appropriate fund.

3. Income from donations and legacies

| | Unrestricted funds 2020 £ | Total funds 2020 £ | Total funds 2019 £ |
|-------------------|------------------------------------|-----------------------------|-----------------------------|
| Donations | 50 | 50 | - |
| Grants | 80,233 | 80,233 | 125,000 |
| | <u>80,283</u> | <u>80,283</u> | <u>125,000</u> |
| <i>Total 2019</i> | <u>125,000</u> | <u>125,000</u> | |

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

3. Income from donations and legacies (continued)

Grants includes £30,233 (2019: £nil) received under the Government Coronavirus Job Retention Scheme.

4. Income from charitable activities

| | Unrestricted funds 2020 £ | Restricted funds 2020 £ | Total funds 2020 £ | Total funds 2019 £ |
|--|------------------------------------|----------------------------------|-----------------------------|-----------------------------|
| Training and education | 253,690 | 94,988 | 348,678 | 631,990 |
| Income from charitable activities - Other income | 1,025 | - | 1,025 | 1,118 |
| Income from charitable activities Memberships | 3,465 | - | 3,465 | 2,775 |
| | <u>258,180</u> | <u>94,988</u> | <u>353,168</u> | <u>635,883</u> |
| <i>Total 2019</i> | <u>392,344</u> | <u>243,539</u> | <u>635,883</u> | |

5. Investment income

| | Unrestricted funds 2020 £ | Total funds 2020 £ | Total funds 2019 £ |
|--|------------------------------------|-----------------------------|-----------------------------|
| Investment income - Bank interest receivable | 2,351 | 2,351 | 1,890 |
| | <u>1,890</u> | <u>1,890</u> | |
| <i>Total 2019</i> | <u>1,890</u> | <u>1,890</u> | |

THE SOCIETY FOR THE ADVANCEMENT OF PHILOSOPHICAL ENQUIRY AND REFLECTION IN EDUCATION

(A company limited by guarantee)

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

6. Analysis of expenditure on charitable activities

Summary by fund type

| | Unrestricted funds 2020 £ | Restricted funds 2020 £ | Total funds 2020 £ | Total funds 2019 £ |
|------------------------|------------------------------------|----------------------------------|-----------------------------|-----------------------------|
| Training and education | 604,082 | 94,988 | 699,070 | 897,115 |
| <i>Total 2019</i> | <i>734,590</i> | <i>162,525</i> | <i>897,115</i> | |

7. Analysis of expenditure by activities

| | Activities undertaken directly 2020 £ | Support costs 2020 £ | Total funds 2020 £ | Total funds 2019 £ |
|------------------------|---|-------------------------------|-----------------------------|-----------------------------|
| Training and education | 214,676 | 484,394 | 699,070 | 897,115 |
| <i>Total 2019</i> | <i>402,628</i> | <i>494,487</i> | <i>897,115</i> | |

Analysis of direct costs

| | Training and education 2020 £ | Total funds 2020 £ | Total funds 2019 £ |
|---------------|--|-----------------------------|-----------------------------|
| Trainer costs | 56,927 | 56,927 | 99,876 |
| Venue costs | 26,176 | 26,176 | 43,349 |
| Project costs | 73,056 | 73,056 | 162,525 |
| Other costs | 58,517 | 58,517 | 96,878 |
| | 214,676 | 214,676 | 402,628 |

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

7. Analysis of expenditure by activities (continued)

Analysis of support costs

| | Training and education 2020 £ | Total funds 2020 £ | Total funds 2019 £ |
|----------------------|--|-----------------------------|-----------------------------|
| Staff costs | 370,969 | 370,969 | 351,711 |
| Depreciation | 5,483 | 5,483 | 5,341 |
| Project costs | - | - | 5,678 |
| General office costs | 107,080 | 107,080 | 130,306 |
| Governance costs | 862 | 862 | 1,451 |
| | <u>484,394</u> | <u>484,394</u> | <u>494,487</u> |
| <i>Total 2019</i> | <u>494,487</u> | <u>494,487</u> | |

8. Independent examiner's remuneration

| | 2020 £ | 2019 £ (Audit Fees) |
|---|--------------|---------------------------|
| Fees payable to the Company's independent examiner for the independent examination of the Company's annual accounts | <u>3,950</u> | <u>5,465</u> |

9. Staff costs

| | 2020 £ | 2019 £ |
|--|----------------|----------------|
| Wages and salaries | 333,471 | 318,190 |
| Social security costs | 28,170 | 25,832 |
| Contribution to defined contribution pension schemes | 9,328 | 7,689 |
| | <u>370,969</u> | <u>351,711</u> |

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

9. Staff costs (continued)

The average number of persons employed by the Company during the year was as follows:

| | 2020 No. | 2019 No. |
|-----------------------------|-------------|-------------|
| Average number of employees | 13 | 13 |

The average headcount expressed as full-time equivalents was:

| | 2020 No. | 2019 No. |
|-----------------|-------------|-------------|
| Number of staff | 9 | 9 |

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

| | 2020 No. | 2019 No. |
|-------------------------------|-------------|-------------|
| In the band £60,001 - £70,000 | 1 | 1 |

The remuneration paid to key management personnel during the year amounted to £67,355 (2019: £65,628).

10. Trustees' remuneration and expenses

All trustees give their time freely and no trustee remuneration was paid in the year for acting as a trustee. Two trustees are also trainers and have been remunerated for their work as trainers in accordance with SAPERE's terms and conditions applicable to all trainers. The amounts paid during the year are £9,330 (2019: £12,800). The articles of SAPERE permit trustees to enter into a contract for the provision of services under certain circumstances provided for in the articles. The trustees have considered the issue of having trainers as trustees and are satisfied that it would be in the best interest of the charity for the services to be provided by those trainers who are also trustees, because it is of great benefit to the charity to have trustees who are directly involved in the delivery of training and can bring that expertise to the board. The trustees are satisfied that the arrangements comply with sections 185-188 of the Charities Act 2011.

During the year the value of expenses reimbursed to the trustees was £546 (2019: £966). Three trustees were reimbursed for expenses in relation to travel.

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

11. Intangible assets

| | Website and database £ |
|-----------------------|------------------------------|
| Cost | |
| At 1 September 2019 | 22,292 |
| Additions | 6,720 |
| At 31 August 2020 | <u>29,012</u> |
| Amortisation | |
| At 1 September 2019 | 22,292 |
| Charge for the year | 253 |
| At 31 August 2020 | <u>22,545</u> |
| Net book value | |
| At 31 August 2020 | <u><u>6,467</u></u> |
| At 31 August 2019 | <u><u>-</u></u> |

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12. Tangible fixed assets

| | Office equipment £ |
|--------------------------|--------------------------|
| Cost or valuation | |
| At 1 September 2019 | 28,465 |
| Additions | 143 |
| At 31 August 2020 | 28,608 |
| Depreciation | |
| At 1 September 2019 | 18,554 |
| Charge for the year | 5,227 |
| At 31 August 2020 | 23,781 |
| Net book value | |
| At 31 August 2020 | 4,827 |
| At 31 August 2019 | 9,911 |

13. Stocks

| | 2020 £ | 2019 £ |
|------------------|-----------|-----------|
| Course materials | - | 913 |

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

14. Debtors

| | 2020 £ | 2019 £ |
|--------------------------------|---------------|----------------|
| Due within one year | | |
| Trade debtors | 32,240 | 123,790 |
| Other debtors | 786 | 4,336 |
| Prepayments and accrued income | 12,119 | 90,829 |
| | <u>45,145</u> | <u>218,955</u> |

15. Creditors: Amounts falling due within one year

| | 2020 £ | 2019 £ |
|------------------------------------|----------------|----------------|
| Trade creditors | 11,393 | 4,246 |
| Other taxation and social security | 7,720 | - |
| Other creditors | 29,185 | 29,629 |
| Accruals and deferred income | 317,837 | 299,176 |
| | <u>366,135</u> | <u>333,051</u> |

Of the deferred income of £461,209 (2019: £323,321), £295,291 (2019: £301,843) is unrestricted and £165,917 (2019: £21,478) is restricted.

Deferred income includes £288,226 in relation to income received for training and conferences to be held in 2019-20 and £172,983 in respect of future years.

| | 2020 £ | 2019 £ |
|--|----------------|----------------|
| Deferred income at 1 September 2019 | 313,321 | 214,987 |
| Resources deferred during the year | 376,665 | 237,826 |
| Amounts released from previous periods | (238,778) | (124,492) |
| | <u>451,208</u> | <u>328,321</u> |

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

16. Creditors: Amounts falling due after more than one year

| | 2020 £ | 2019 £ |
|------------------------------|-----------|-----------|
| Accruals and deferred income | 172,983 | 54,757 |

17. Statement of funds

Statement of funds - current year

| | Balance at 1 September 2019 £ | Income £ | Expenditure £ | Balance at 31 August 2020 £ |
|-----------------------------|--|----------------|------------------|-----------------------------------|
| Unrestricted funds | | | | |
| General Funds - all funds | 374,565 | 340,814 | (604,082) | 111,297 |
| Restricted funds | | | | |
| Peter Sowerby Project | - | 9,465 | (9,465) | - |
| Allen & Overy PRU Project | - | 1,411 | (1,411) | - |
| EEF Project Grant 2017-2020 | - | 81,862 | (81,862) | - |
| Welsh Government | - | 2,250 | (2,250) | - |
| | - | 94,988 | (94,988) | - |
| Total of funds | 374,565 | 435,802 | (699,070) | 111,297 |

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

17. Statement of funds (continued)

Statement of funds - prior year

| | <i>Balance at 1 September 2018 £</i> | <i>Income £</i> | <i>Expenditure £</i> | <i>Balance at 31 August 2019 £</i> |
|-----------------------------|--|---------------------|--------------------------|--|
| Unrestricted funds | | | | |
| General Funds - all funds | 508,907 | 519,234 | (653,576) | 374,565 |
| Restricted funds | | | | |
| Peter Sowerby Project | - | 12,950 | (12,950) | - |
| Allen & Overy PRU Project | - | 5,611 | (5,611) | - |
| EEF Project Grant 2017-2020 | - | 224,978 | (224,978) | - |
| | - | 243,539 | (243,539) | - |
| Total of funds | 508,907 | 762,773 | (897,115) | 374,565 |

The Education Endowment Foundation (EEF) projects are evaluating the effectiveness of P4C in schools.

The Welsh Government is supporting the P4C in schools to help address hate crime.

The Peter Sowerby project part-funds 12 schools in North Yorkshire doing the Going for Gold programme.

Allen & Overy is funding P4C in London East Alternative Provision.

For further detail, please see the Trustees' Annual Report.

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

18. Summary of funds

Summary of funds - current year

| | Balance at 1 September 2019 £ | Income £ | Expenditure £ | Balance at 31 August 2020 £ |
|------------------|--|----------------|------------------|-----------------------------------|
| General funds | 374,565 | 340,814 | (604,082) | 111,297 |
| Restricted funds | - | 94,988 | (94,988) | - |
| | <u>374,565</u> | <u>435,802</u> | <u>(699,070)</u> | <u>111,297</u> |

Summary of funds - prior year

| | Balance at 1 September 2018 £ | Income £ | Expenditure £ | Balance at 31 August 2019 £ |
|------------------|--|----------------|------------------|--------------------------------------|
| General funds | 508,907 | 519,234 | (653,576) | 374,565 |
| Restricted funds | - | 243,539 | (243,539) | - |
| | <u>508,907</u> | <u>762,773</u> | <u>(897,115)</u> | <u>374,565</u> |

19. Analysis of net assets between funds

Analysis of net assets between funds - current period

| | Unrestricted funds 2020 £ | Restricted funds 2020 £ | Total funds 2020 £ |
|-------------------------------------|------------------------------------|----------------------------------|-----------------------------|
| Tangible fixed assets | 4,827 | - | 4,827 |
| Intangible fixed assets | 6,467 | - | 6,467 |
| Current assets | 473,204 | 165,917 | 639,121 |
| Creditors due within one year | (261,506) | (104,629) | (366,135) |
| Creditors due in more than one year | (111,695) | (61,288) | (172,983) |
| Total | <u>111,297</u> | <u>-</u> | <u>111,297</u> |

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NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 AUGUST 2020

19. Analysis of net assets between funds (continued)

Analysis of net assets between funds - prior period

| | <i>Unrestricted funds 2019 £</i> | <i>Restricted funds 2019 £</i> | <i>Total funds 2019 £</i> |
|-------------------------------------|--|--|---------------------------------------|
| Tangible fixed assets | 9,911 | - | 9,911 |
| Current assets | 730,984 | 21,478 | 752,462 |
| Creditors due within one year | (311,573) | (21,478) | (333,051) |
| Creditors due in more than one year | (54,757) | - | (54,757) |
| Total | 374,565 | - | 374,565 |

20. Operating lease commitments

At 31 August 2020 the Company had commitments to make future minimum lease payments under non-cancellable operating leases as follows:

| | 2020 £ | 2019 £ |
|-----------------------|-------------------|-------------------|
| Within 1 year | 4,631 | 9,613 |
| Between 1 and 5 years | 3,979 | 4,433 |
| | 8,610 | 14,046 |

21. Related party transactions

There have been no related party transactions during the year other than those set out in Note 10.