

EDUCATION EXCHANGE

England & Wales · Charity number 1149665

Details

Status Registered

Legal form Trust

Registered 2012-11-08

Register [View on the Charity Commission register](#)

Contact

Address White Rose
Fen Street
Hopton
Diss
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Activities

Objects: FOR THE PUBLIC BENEFIT TO ADVANCE EDUCATION AND TRAINING, PRESERVE AND PROTECT THE HEALTH AND RELIEVE THE FINANCIAL HARDSHIP OF PEOPLE LIVING IN THE WUNDANYI LOCAL GOVERNMENT DISTRICT, TAITA-TAVETA, KENYA, IN PARTICULAR BUT NOT EXCLUSIVELY BY SUPPORTING THE WORK OF SCHOOLS AND TRAINING CENTRES, WORKING IN PARTNERSHIP WITH LOCAL HEALTH CLINICS TO PROVIDE EQUIPMENT, FACILITIES AND SERVICES AND BY PROVIDING LOANS AND GRANTS.

Activities: We raise funds in the UK to support the community in and around Wundanyi and Mwatate, Taita, Kenya. Our fundraising takes two main forms: monthly giving and individual donations. In Kenya we support four projects which are locally led and organised. We work with a Health Centre, an IT Training Centre, a Community Support Group and a Children's Home.

Classification

- **How:** Makes Grants To Organisations, Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives, The Prevention Or Relief Of Poverty, Economic/community Development/employment
- **Who:** Children/young People, Other Defined Groups

Geography

- Kenya

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£18,340	£20,114	-	-
2023-12-31	£24,819	£28,218	-	-
2022-12-31	£17,941	£25,347	-	-
2021-12-31	£31,633	£21,733	-	-
2020-12-31	£27,303	£27,782	-	-

Trustees

Name	Role	Appointed
MAGGIE WAUGH	Chair	2015-11-01
ABBIE Stewart		2025-04-14
DAVE SHORTEN		2012-09-22
ELLIE STEWART		2012-09-22
ROB WAUGH		2015-11-01
SUE SHORTEN		2015-11-01

EDUCATION EXCHANGE

England & Wales - Charity number 1149665

Accounts



Education Exchange Annual Report, 2021

Trustees:

Margaret Nicholls
Paul Nicholls
Dave Shorten
(Secretary) Sue
Shorten
Ellie Stewart
Maggie Waugh
(Chairperson) Rob Waugh

Objectives:

To advance education and training, preserve and protect the health and relieve financial hardship of people living in the area in and around Wundanyi, Taita-Taveta, Kenya. This to be done in particular by supporting the work of schools and training centres, working in partnership with local health clinics and by providing loans and grants

The trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Education Exchange supports several projects in Taita and reports on the activities of each follow.

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Registered Charity Number 1149665

Summary of Activities:

Kenyan Coordinator

In October 2021 we appointed Christine Mlemwa as our Coordinator in Kenya. This was a major part of our long-term strategy to devolve more decision-making responsibility to Kenya. Christine has been known to Education Exchange since 2006 and now that she has retired from her headteacher post she was very happy to take the role. She will work in close co-ordination with George Mwakisha, who is the Chairman of Education Exchange Taita

Grace Mwatate Children's Home

We continued to make a contribution to the salaries of staff. We donated funds to help with the medical needs of one disabled child. We send some of the funds raised by our three runners in the Virtual London Marathon in October to the Home to pay secondary school fees- always a real burden.

Taita Environmental Initiative (TEI)

TEI Coordinator Scaver Isuwirio stepped down after leading the organisation since its inception in 2008. He was replaced by Irine Mkavita, who has been a much respected member since 2012. To help Irine on the five mile journey to and from home to Wundanyi we made a contribution to the purchase of a motor bike. We continued to pay the salaries of Coordinator, Secretary and Nightwatchman. At the start of the year we made a contribution to the two main income generating activities run by TEI- the shop in the market and the production of charcoal briquettes for cooking stoves.

Upper Planet IT Training Centre

This has been a difficult year for Upper Planet, mainly caused by the pandemic: few people have been able to afford IT lessons as many people struggled with issues of family poverty. So plans to transfer the Kitukunyi Centre into Wundanyi town had to be shelved and income from the newly opened Centre in Mwatate dropped considerably. We had to send one tranche of emergency funding to allow both to remain open. Both centres continue to offer printing facilities and Cybercafe usage after teaching hours.

Mvono Medical Centre

Mvono's principal ongoing task this year has been to combat the effects of the pandemic. Although cases of Covid were relatively rare in Taita, it has

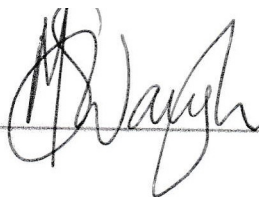
been important to monitor the health of patients, as no vaccination or testing has been available to most people. Selina was however able to access a single vaccination to keep herself as safe as possible. During the year Mvono used a development grant from Education Exchange to computerise its record keeping system and install the internet and Wi-Fi.

Mbauro Primary School

Early in the year the school received a donation from one of our supporters which was used to install improved storage tanks for water and to improve classroom teaching materials. Then in October the three teachers who ran the Virtual Marathon decided to devote their sponsorship to addressing two particular needs at the school. Firstly, funds were sent to help struggling parents provide food and clothing for their families. Then we provided the older girls with reusable sanitary ware through PadMad, a social enterprise company in Nairobi.

Declaration:

The trustees declare that they have approved the trustees' report above. Signed on behalf of the charity's trustees:



(Chairperson)



Summary of accounts, 2021

a) Income

Monthly Direct Debits	6360
Donations	9919
HMRC Gift Aid	2757
Marathon	5483
Aloysius Trust	6000
Recycling income	1114

31633

b) Expenditure

Upper Planet	5223
TEI	4009
Mvono Medical Centre	5599
Grace Mwatate Children's Home	3678
Mbauro Primary School	2898
Coordinator salary & expenses	242
Entry fees London Marathon	84

21733

Approved by trustees 03/10/22

Signed _____

(Chairperson)

Education Exchange, Charity no 1149665
Audit of Accounts for the period 1 January 2021 - 31 December 2021

The following were provided for checking.

- Monthly bank statements, spreadsheet showing monthly Direct Debits and Standing Orders, and the paying in book plus deposit receipts.
- Transaction documents from HSBC and TorFX, with explanatory emails to and accompanying receipts from the relevant projects in Kenya
- Income and Expenditure summaries - which balanced. Last years figures are in brackets.

Income

- Total income was up at £31,632.70 (£27,303).
- Donations increased to £9,899.31 (£6,633.05) including a significant new one of £7,297 from the Gadsby estate.
- There was a further grant of £6k from the Aloysius Trust (£11k),.
- The monthly Standing Order payments from 27 donors were £6,360 (£5,870).
- HMRC Gift Aid repayment was down at £2,756.99 (£3,655.36).
- Income from sales of scrap metal rose markedly to £1,113.58 (£145.13).
- Sponsorship for runners in the Virtual Marathon was £5,482.72

The income summary reconciled with the bank statements and receipts.

Expenditure

- Total expenditure for the period was £21,733.53 (£27,782.49). This included £273.85 which was lost during a transfer in 2020 and was credited to the EE account once it was found in 2021.
- Payments to the 5 projects in Kenya were as follows :-
 - Upper Planet £5,223 (£4,654.47)
 - TEI £4,008.50 (£9,987.92)
 - Mvono £5,599.29 (£6,288.75)
 - Mwatate £3,678.03 (£6,068.78)
 - Mbauro £2,898.37 (new)
 -
- In every case there is an email from Dave Shorten explaining the purpose of each payment and where appropriate setting out further payments that will be made during the financial year. Within the email there is also a reminder/request for a receipt for the actual amount received.
- Returning of receipts is much improved this year, apart from Upper Planet which still required several reminders.
- Payments to the newly appointed Co-ordinator (CM) were £242.34 and a further £84 was spent on entry for the virtual marathon.
- There were no re-imbursements of Trustee expenses this year.
- Transfers via TorFX appear to work well although they don't provide the exchange rate with each transaction - which has fluctuated against sterling at between 146KES and 149KES.
- HSBC have changed their procedures for paying money in, making the audit trail a little less clear - and they are also charging for its charity account - but the figures do balance.
- The bank balance at 31 December 2021 was £18,528.61 (£8,355.59) which is significantly higher than usual.

With every good wish for another good year ahead.

Terry Ward 29 July 2022

EDUCATION EXCHANGE

England & Wales - Charity number 1149665

Accounts



Education Exchange Annual Report 2020

Trustees:

Maggie Nicholls
Paul Nicholls
Dave Shorten (Secretary)
Sue Shorten
Ellie Stewart
Maggie Waugh (Chairperson)
Rob Waugh

Objectives:

To advance education and training, preserve and protect the health and relieve financial hardship of people living in the area in and around Wundanyi and Mwatate, Taita-Taveta, Kenya. This to be done in particular by supporting the work of schools, children's homes and training centres, working in partnership with local health clinics and providing loans and grants.

The trustees have had regard to the guidance on public benefit issued by the Charity Commission.

Education Exchange supports four projects in Taita and reports on the activities of each follow.

Grace Mwatate Children's Home

As with all our projects, 2020 was a year in which the leaders of Grace Mwatate focussed on keeping their children safe from the pandemic. However, early in 2020 we were still able to help leaders Habel Mwakio & Pastor Simon Kariuki press ahead with the installation of solar panels and battery- the aim of which is to enable the home to satisfy most of its own electricity needs. This cost just over £5000, and we covered this amount thanks to generous support from the Aloysius Trust, who committed in 2019 to giving Education Exchange £6000 a year for three years, which trustees agreed to spend exclusively on development grants. When trustees Sue & Dave Shorten visited in late January/ early February 2020, they met staff and children, they went to church with them and took gifts from Hopton Primary School. There are still some 30 children who live at Grace Mwatate, with more primary than secondary aged children.

Taita Environmental Initiative (TEI)

In January, before our Trustee visit later in the month, we used another Aloysius Trust grant of £4100 to fund for TEI the purchase of a machine to produce charcoal briquettes from waste plant material. This machine was to become a principal income generating activity for TEI through 2020 and beyond. Sue & Dave saw the machine in action during their visit- indeed they helped in the production of a sample supply of briquettes: they are a much cheaper and more eco-friendly alternative to the charcoal briquettes which most people cook with in Taita. This project clearly has much potential to make money for TEI. In January, TEI also moved their office and workshop much closer to the centre of Wundanyi, so that their welding business might attract more customers. The TEI shop in the market also continues to produce funds for the organisation.

At the height of the first wave of Covid, we sent an extra £1300 to TEI to enable them to support people who were struggling financially.

In June Scaver Isuwirio stepped down from his role as TEI Coordinator. Scaver founded TEI in 2008 and has been massively instrumental in the success of the organisation, developing it into a highly respected and successful community group in and around Wundanyi, with many people benefitting from its financial support and practical advice. He was succeeded by Irine Mkavita, whom Sue & Dave first met in 2012, and whose smallholding they visited again on this visit. In their judgement, Irine is an excellent choice as the new Coordinator.

In November it emerged that two members of TEI staff had not been paid since 2019. This had not been mentioned to Sue & Dave in January, and trustees reluctantly decided to send £1680 from our reserves to cover this shortfall. It was clear that Irine had inherited this situation and we wanted to give her a clean sheet at the start of her time in office. We made it clear to the TEI Board of Management that we would not be willing to help if there were any future financial difficulties.

Upper Planet Training Centres

This was a very difficult year for Upper Planet. In the second half of 2019 George Mwakisha had refurbished a new Upper Planet Centre in Mwatate, having closed the Mwatunge Centre because it had failed to remain viable. The Mwatate Centre is in an excellent position on the main road at the busiest crossroads in a row of bustling shops. Mwatate itself is taking over from Wundanyi as the principal town in our part of Taita, with a number of local government offices moving down to the plains from the hills. When Sue & Dave visited in January, the Centre had just opened and there were early signs that the business was picking up. Then came Covid and lockdown: the Mwatate Centre and the well-established Centre in Kitukunyi were forced to stop teaching and close operations: only the shop at Kitukunyi remained open. So income from training was non-existent for most of the year, and only the Kitukunyi shop brought in regular cash, and the new Mwatate Centre closed for the second half of the year.

In addition, many Kitukunyi shop customers had lost their jobs and were asking for provisions without being able to pay there and then. In June and August, we made two payments to Upper Planet, totalling £1300, which enabled people in this dreadful position to have some basic food: there is a common understanding in Kenyan culture (this is backed up by Selina's experience at Mvono Clinic) that if you are given credit, you pay back whenever you can, even if this is years later. Trustees willingly took George Mwakisha's advice (our philosophy is to trust the decision making of our leaders on the ground in Kenya) We hope that 2021 will bring re-openings and reestablishment of sold income streams and the chance for Kenyans to improve their IT skills.

Mvono Medical Clinic

This year brought many challenges for Selina and her team at Mvono. Soon after Covid took hold in Kenya, which was somewhat later than in the UK (cases in Taita have never reached the numbers we experienced here) it was clear that health professionals were not going to have access to levels of protection and safety available to our health workers. We therefore did all we could to keep her and her staff safe. So in April we sent Mvono an extra £1800 for her to buy protective equipment, to install an extractor fan in her surgery and to revamp her waiting area, so that patients could wait more safely before consultations. (The Aloysius Trust gave us an extra £5000 to address pandemic issues across our four projects) Selina was very appreciative of this support and has been better able to stay safe than colleagues in other local clinics (it is worth saying that she was not double jabbed until August 2021!) When Sue and Dave visited in January 2020 Selina was looking forward to taking her development agenda further forward through the year, in particular a successful application to be registered as a provider under the NHIF (National health Insurance Fund). But all this has had to be sidelined as she combats Covid in her community.

Summary of Accounts 2020

a) Income

Monthly Direct Debits	5870
Donations	6633* including 783 trustee travel costs donated back to the charity
Aloysius Trust	11000
Gift Aid	3655
Recycling	145
Total	27303

b) Expenditure

Upper Planet IT Centres	4654
TEI	9988
Mvono Clinic	6289
Grace Mwatate Children's Home	6068
Travel expenses*	783* trustee travel costs (donated back to the charity)
Total	27782

Education Exchange, Charity no 1149665

Audit of Accounts for the period 1 January 2020 – 31 December 2020

The following were provided for checking..

- Monthly bank statements, spreadsheet showing monthly DDs and SOs, and the 2 paying in books
- Transaction documents from Rational FX and TorFX, explanatory emails and accompanying receipts from the relevant projects in Kenya
- Income and Expenditure summaries - which balanced.

Income

- Income was £27,303 (£23,785.21). This included grants of £6k and £5k from the Aloysius Trust and £2k from Garry Deeks.
- The monthly Standing Orders from 28 donors were £5,870 (£4,325) – a significant increase.
- HMRC Gift Aid repayment was £3,655.36 (£2491.75).
- Income continues from sales of scrap metal - £145.13 (£475.18).
- The revised income summary reconciled with the bank statements.

Expenditure

- Total expenditure for the period was £27,782.49 (£20,303.21)
- Payments to the 4 projects in Kenya were as follows :-
 - Upper Planet £4,654.47 (£6,004.14)
 - TEI £9,987.92 (£2,887.99)
 - Mvono £6,288.75 (£3,567.86)
 - Mwatate £6,068.78 (£6,439.67)
 -
- In every case there is an email from Dave Shorten explaining the purpose of each payment and where appropriate setting out further payments that will be made during the financial year. Within the email there is also a reminder/request for a receipt for the actual amount received. Despite this, there are numerous receipts missing from Upper Planet, Mvono and TEI.
- Trustees have approved the re-imburement of trustee expenses when they travelled to visit and monitor progress at the projects in Kenya. The sum of £782.57 was paid out in respect to D and S Shortens trip in Jan/Feb 2020 and immediately paid back in as a donation by D Shorten.
- Following continuing problems and delays with former provider Rational FX, international payments were changed to TorFX during the year. There were some initial problems with a payment to Mvono but these were rectified and all the payments reconcile with the bank statements. The exchange rate has continued to fluctuate between 131KES and 126KES.
- The bank balance at 31 December 2020 was £8,355.59 (£8,834.54)

Governance

This year I have had a wider discussion with Dave Shorten than usual, prompted mainly by:-

- The extension of the charity's reach and role to include emergency (Covid19) funding for individuals in need and the delegation to 3rd parties for its allocation.
- Problems with TEI finances which highlight the risks associated with oversight of projects and people so far away.
- The recruitment and retention of Trustees and the dependence upon and influence of the Shorten family.

In response,

- DS has provided a copy of your Trust Deed which clearly provides for 'the relief of financial hardship'. However it is nevertheless important that such decisions are ratified by the Board and properly minuted.
- DS has also provided a copy of his proposals for changes to the management of projects in Kenya. I am reassured that whatever the Boards final decisions about appointment of someone 'on the ground' with delegated responsibilities and authority, this can only help improve the monitoring of and reporting on both activities and financial management. It would be prudent to include the creation of - and regular reporting on - a basic 'risk register' as part of the local managers role.
- Clearly the various members of the Shorten family have been crucial to the creation and successful development of EE and DS is increasingly aware of the need to put its work on a more sustainable and transparent footing. Assuming that the UK end of EE is to continue along similar lines to now, I would recommend that Trustees should be elected at least every three years and serve a maximum of three of such terms. I believe this would help with recruitment and broadening representation.

I wish the charity and its trustees continuing success over the next twelve months.

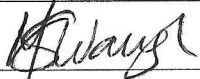
Terry Ward
June 2021

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Declaration

The Trustees declare that they have approved the trustees' report above

Signed on behalf of the trustees:

Signature	
Full Name	MARGARET SINCLAIR WAUGH
Position	CHAIRPERSON
Date	25/10/21