



## Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day	Month	Year		Day	Month	Year
	1	Sept	2022		31	August	2023

### Section A Reference and administration details

Charity name

Opportunity Through Education

Other names charity is known by

Registered charity number (if any) 1179046

Charity's principal address

The Long House, Hurtmore Road, Godalming, Surrey.

Postcode

GU7 2RB

#### Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Alan Lion	Trustee		
2	Nicola Lion	Trustee		
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

#### Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year
None	

**Names and addresses of advisers (Optional information)**

Type of adviser	Name	Address
Independent Examiner	Charles Hume	

**Name of chief executive or names of senior staff members (Optional information)**

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## Section B Structure, governance and management

**Description of the charity's trusts**

Type of governing document (eg. trust deed, constitution)	CIO - FOUNDATION REGISTERED 03 JUL 2018
How the charity is constituted (eg. trust, association, company)	CIO
Trustee selection methods (eg. appointed by, elected by)	Apart from the first charity trustees, every trustee must be appointed for a term of 3 years by a resolution passed at a properly convened meeting of the charity trustees.

**Additional governance issues (Optional information)**

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

OTE was set up to support the work of Nicki and Alan Lion ("the trustees"), plus the work of three partners, Elizabeth Hodgkin ("Liz"), Rebecca Mallinson ("Rebecca") and Welcome Home School ("WHS").

When the charity started, Liz and Rebecca jointly approach the trustees and asked for assistance. Rebecca had previously been supported by another UK registered charity, but, due to the burden of administration involved, that charity had asked Rebecca to try to find another UK registered charity able to support her. After discussion, the trustees agreed to provide support. The basis upon which OTE supports Liz and Rebecca is contained in a separate document titled:

"Basis Of Working Together OTE and Partner 20180728.docx"

In the summer of 2022, the trustees were approached and asked to support to the Welcome Home School ("WHS"), Tanzania. After due investigation, including a visit to the school in February 2023, the trustees agreed to offer the same assistance to WHS as to Liz and Rebecca.

## Section C Objectives and activities

**Summary of the objects of the charity set out in its governing document**

The objectives of the charity are:

"The relief of poverty with particular emphasis on education for the young and disadvantaged anywhere in the world."

The trustees believe that the provision of education is one very practical way to help people out of poverty and into a worthwhile and sustainable life.

**Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)**

The review of activities and highlights below sets out how the work of OTE provides significant benefit to the public.

In terms of finances, OTE enjoyed another record income for the year under review. Funds were boosted by:

- (a) The inclusion of WHS
- (b) Some very generous donations from charities and foundations
- (c) The continued generosity of so many individuals in times of economic difficulty

How these funds have been used is set out later in this report.

In overall terms, income this year was £69,052 (2021: £69,796) and payments to beneficiaries and HMRC amounted to £68,549 (2021: £68,549). It should be pointed out that the income for 2021 included an overpayment by HMRC of £4,874, together with a repayment of this amount. As such, this amount is included in both the income and payment 2021 figures and, as such, slightly inflates the real position.

The accounts this year also include some travel costs. The trustees took the decision that one of them should visit Tanzania (including WHS) now that the COVID pandemic has passed. Nicki Lion undertook a two-week visit, including catching up with nearly all the students that OTE assists, as well as seeing, at first hand, the work of WHS.

In its decision making the trustees of OTE are aware of and have complied with their duty to have due regard to The Charity Commission's public benefit guidance when they have exercised any powers and duties to which the guidance is relevant.

**Additional details of objectives and activities (Optional information)**

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

The trustees wish to thank the following organisations and institutions for their support in the past year:

The Erica Leonard Fund  
The R&H Grey Foundation  
The T W Roberts Trust

In addition, the trustees wish to thank the many individuals who have so generously supported the work of OTE in the past year. Without such support, the wonderful transformation of some many young people's lives that has been achieved would never have happened.

**Summary of the main achievements of the charity during the year**

The following represent just some of the people and projects that have been supported by the charity in the period covered by this review:

*OTE Projects*

Every student sponsored by OTE is either known to or vetted by the trustees. We seek to help young people who cannot help themselves. We focus on students who are orphans or who have fallen on hard times part way through their education and where it is perceived that there will be considerable benefits if that person is given the opportunity to complete his or her education. In addition, we assist the families of students where we perceive that, in so doing, this assistance will lead to a better overall outcome for the students and families in terms either of the alleviation of poverty or the promotion of education or both.

In the period covered by this report, OTE gave assistance to many students and causes. Here are details of three typical examples:

Living Morewa – He has continued his medical studies in Tanzania. He recently qualified as a doctor and is due to take up his first residential posting at a hospital in Tanzania. After many years of study, Living has achieved his goal and will now be able to serve the people of Tanzania.

Paulo / Carina – Paulo and Carina are married. Paulo is studying to be a teacher. OTE has been supporting him and the education of his family. The family has adopted two orphan children (Paulo is also an orphan). When Carina got pregnant, she encountered life-threatening medical problems. OTE stepped in to help her. Sadly the new born child did not survive.

Abraham Machanga and family – Abraham is the son of a very poor family struggling to survive. Rather than simply provide money for educational needs, we have been working with Abraham and his family to try to establish a way that the family can generate income for both survival and education of their children.

**Work In South Sudan**

Both Liz and Rebecca are committed to helping to support and provide education to disadvantaged children in South Sudan. Since December 2012 an estimated 50,000 South Sudanese have died and hundreds of thousands have been displaced. South Sudan ranks among the worst in the world in terms of literacy, education and deprivation.

*Elizabeth Hodgkin Projects*

Here are selected extracts from Liz's reports to sponsors in 2021-2022:

December 2022 – Thank You For Your Help In 2022

Our main focus has been and remains St Augustine's school. It was particularly gratifying to receive the following email in July from the Director of Studies:

"Greetings to you. We received today the results for our students who sat for their national examination 2020/2021. St. Augustine secondary emerged to be the best in Ikotos County, and Ikotos County became the best in the State. Our students passed all from an average of 70% and

above. Martine Taban brought 82% Arts section, followed by Mary Huwaha Simon brought 81%. Science section. Both of them are your sponsored students."

The present batch of letters express a lot of gratitude for the funding, and students try to show how going to school has changed their lives. Here are a few examples:

James: "Without your great help I would not be studying now but with your help my whole life has changed. I was really hopeless not knowing where to get money."

Samuel: "Your support changed my life from darkness to light in terms of education."

Agnes: "Before your help, in S1 parents said I should give up school and get married."

In addition, Liz has continued to support a deaf student from the area, who is attending a specialised school in Uganda, as well as a number of students in higher education.

#### Rebecca Mallinson Projects

The main focus of Rebecca's work is Cece Primary School. It is no exaggeration to state that Rebecca has, with the help of her supporters, built this school up from nothing. Rebecca lives there, works there and fights for every child in the school. If you want to read about her inspirational work please visit her blog site:

<https://living-in-nimule.blogspot.com/>

Here are selected extracts from Rebecca's reports to sponsors in 2022-2023:

#### September 2022 – School exam statistics over the years

These steadily improving results have been made possible because of a school policy of ensuring that pupils are in the right class according to their current learning levels. Where pupils are unable to cope they are put into a lower class so that they can get a solid foundation. If they are too advanced for their current class, they are promoted so that they can be challenged and will not disrupt the teaching of others in the class through boredom.

The exam papers are produced by the subject teachers for each class and are supposed to reflect what our pupils have been taught.

Literacy is taken very seriously. A method called Jolly Phonics is used, which is very suitable for a learning environment with few materials.

Classes are no larger than 35, and in several cases in the upper school, from 10 to 20. This allows teachers to give more time to their students than in other local schools.

#### February 2023 – The new school year has a bumpy start

Here in Nimule, we have been having plenty of challenges but are on a much more even keel than when I wrote last. I am very grateful for the donations which came in response to my last blog post. As you will see

below, your donations came at an opportune time.

We have received a large supply of national curriculum textbooks from the Ministry of Education for classes from Primary 4 to Primary 8. This is a great windfall, as there has been a huge shortage in the whole town. In some cases, there has been only one textbook for a whole class, so that only the teacher has been able to use it. If textbooks go missing, it has been a matter of going to other schools to beg from them, knowing that we are all in the same position.

With the help of your donations, we were able to pay our teachers in December and January, for which a heartfelt thank you.

The next problem looming on the horizon is the need for new desks due to an increase in the number of classes and classrooms. We are going to begin the school year by making do with mats for the youngest class, as there is currently no budget for desks due to the construction work on the classrooms. We have received one quotation so far, which is for the equivalent of nearly £70 per three-seater desk. That is not including transport, which is often a similar amount to the cost price. I hope to find a better price elsewhere as we will need at least 10 or 15 desks. It is not possible to buy readymade furniture here.

Like South Sudan, the Ugandan school year starts on 6<sup>th</sup> February, so I really have my hands full at the moment. As a result, I am in the midst of making two trips to Uganda taking a couple of blind children to one school and the deaf children to another one at a much greater distance near a town called Mbale, near the border with Kenya. I have warned the headteacher in Mbale that we will be several days late. There is another couple of deaf children who go to school in Gulu, who will be taken back by their parents. I have just paid their school fees while in Uganda on the first trip.

#### Welcome Home School (WHS) Tanzania

Here is a brief explanation of the background to WHS. Fiona Hendy started to build an orphanage on the outskirts of Dar es Salaam in 2013. Her vision and that of her fellow founders was that, one day, they would add a school. WHS is the result of the hard work and dedication of Fiona and her team. Today a thriving primary school runs alongside the orphanage. The school caters for the orphans as well as for poor rural families in the surrounding area. It provides a quality education where none previously existed. Each year the school expands to cater for the children as they grow and mature. Part of Fiona's vision is that the school should be open to volunteers so that people from more developed countries can contribute their skill and time to this excellent work.

#### AND A BIG THANK YOU

None of the above work would be possible without the extremely generous financial support that OTE receives from its many supporters.

"Kindness is like snow. It beautifies everything it covers."

## Section E

## Financial review

### Brief statement of the charity's policy on reserves

The charity holds limited reserves. It has little or no ongoing expenditure commitments as all the administration is done by volunteers and all administrative costs are currently covered by the trustees. Where OTE is expecting to sponsor a student for a number of years, the trustees may hold a suitable amount in reserve to cover future years' costs. However, the amounts so retained are relatively small.

As at 31/08/2022 the charity had a total of £5,544 (2020: £4,297) in its bank account.

### Details of any funds materially in deficit

Not applicable.

### Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

The charity's accounts have been produced on a receipts and payments basis. At the year-end, the charity was due Gift Aid from HMRC for the period from 01/06/2022 to 31/08/2022. This amount of Gift Aid (£600) was claimed and received after the end of the period covered by this report. As such it is not included in this year's accounts.

The charity had no accrued liabilities at the end of this period.

## Section F

## Other optional information

None.

## Section G

## Declaration

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

Signed on behalf of the charity's trustees

Signature(s)	Signed Electronically	
Full name(s)	Alan Keith Lion	
Position (eg Secretary, Chair, etc)	Chair	

**Date** 30<sup>th</sup> January 2024





CHARITY COMMISSION  
FOR ENGLAND AND WALES

Charity Name	No (if any)
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## Receipts and payments accounts

For the period from	Period start date 9/1/2022	To	Period end date 8/31/2023
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds REB to the nearest £	Restricted funds LIZ to the nearest £	Restricted funds WHS to the nearest £	Total funds to the nearest £
<b>A1 Receipts</b>					
Direct Donations	12,474	24,795	14,659	8,560	60,488
Virgin Money Donations					-
Give As You Live	15				15
Income Tax Refund	1,135	4,248	1,177	1,832	8,392
					-
					-
					-
					-
<b>Sub total</b> (Gross income for AR)	13,624	29,043	15,836	10,392	68,895
<b>A2 Asset and investment sales, (see table).</b>					
					-
					-
<b>Sub total</b>					-
<b>Total receipts</b>	13,624	29,043	15,836	10,392	68,895
<b>A3 Payments</b>					
Payments To Beneficiaries	12,432	28,900	16,100	10,000	67,432
Travel Costs	1,570				1,570
Bank Fees	25			25	50
Gift Aid Refund (overpaid)					-
					-
					-
					-
					-
					-
<b>Sub total</b>	14,027	28,900	16,100	10,025	69,052
<b>A4 Asset and investment purchases, (see table)</b>					
					-
					-
<b>Sub total</b>					-
<b>Total payments</b>	14,027	28,900	16,100	10,025	69,052
<b>Net of receipts/(payments)</b>	- 403	143	- 264	367	- 157
<b>A5 Transfers between funds</b>					-
<b>A6 Cash funds last year end</b>	4,579	368	597	-	5,544
<b>Cash funds this year end</b>	4,176	511	333	367	5,387

## Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £
<b>B1 Cash funds</b>	Santander Business Account	4,176	1,211
		-	-
		-	-
	<b>Total cash funds</b>	4,176	1,211
	(agree balances with receipts and payments account(s))	OK	OK
<b>B2 Other monetary assets</b>		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
<b>B3 Investment assets</b>			-
			-
			-
			-
			-
<b>B4 Assets retained for the charity's own use</b>			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
<b>B5 Liabilities</b>			-
			-
			-
			-
			-
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	
	Signed Electronically	Alan Lion	

CC16a

Last year

to the nearest £

55,276
188
18
14,314
-
-
-
-
69,796

-
-
-

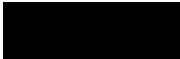
69,796
--------

63,675
-
-
4,874
-
-
-
-
-
68,549

-
-
-

68,549
--------

1,247
-
4,297
5,544








Date of approval
TO DO



Section A

Independent Examiner's Report

Report to the trustees/  
members of

Charity Name  
Opportunity Through Education

On accounts for the year  
ended

31<sup>st</sup> August 2023

Charity no  
(if any)

1179046

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/08/2023.

Responsibilities and  
basis of report

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent  
examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention (~~other than that disclosed below~~\*) in connection with the examination which gives me cause to believe that in, any material respect:

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

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

\* Please delete the words in the brackets if they do not apply.

Signed:

Date:

- 7 MAR 2024

Name:

CHARLES ROBERT HUME

Relevant professional  
qualification(s) or body  
(if any):

Address:

CHARLES R. HUME, FCA  
Pitfold, Hurtmore Road,  
Godalming, Surrey,  
GU7 2RB  
01483 414302 & 07484 128152  
Email: charleshume@aol.com



Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

None

  
- 7 MAR 2024