

## **Trustees' Annual Report for the period ending 30<sup>th</sup> June 2020**

Education Otherwise Association charity registration number: 1055120

### **Objectives**

To promote, maintain, improve, and advance public education, particularly by the provision of information, support and facilities to enable parents to make educational provision for their children otherwise than through full time state or private educational institutions.

### **Activities**

Education Otherwise is a membership organisation for the public benefit, which provides support and information for families whose children are being educated outside of school and for those who wish to uphold the freedom of families to choose the best form of education for their children.

### **Our principal aims are:**

- To encourage learning outside of the school system.
- To reaffirm that parents have the primary responsibility for their children's education and that they have the right to exercise this responsibility by educating them out of school.
- To establish the primary right of children to have full consideration given to their wishes and feelings about their education.
- To promote knowledge, understanding and acceptance of education otherwise than at school in the world at large.

These aims are met via our public website as well as through the public helpline, internet support lists and our Facebook group. Support and information is provided to members, home educators, the media, local and national government and other interested parties including voluntary agencies. In addition, members receive a regular newsletter, the member home area of our website and internet support.

Local Home Education Groups organised by Education Otherwise members may take advantage of reduced premiums for Public Liability Insurance through our Policy.

Education otherwise is entirely run and managed by volunteers and the main activities undertaken by the charity are in furtherance of the public benefit. In organising these activities, trustees have had regard to the guidance issued by the Charity Commission on public benefit.

### **Achievements and Performance**

The charity continues to make a difference through the support given by our volunteers.

**Telephone helpline:** Our telephone helpline receives a significant number of calls and callers are reassured and supported by the information that they receive. Our new telephone line is now live and can be accessed on 0300 1245690.

**Website:** Our website receives an increasing level of traffic, which has risen in light of Covid 19's affect upon families leading to them reading the support pages and downloading information sheets. Trustees are very excited by the considerable progress which has been made in developing our new website, the launch of which is in the next financial year.

**CIO status:** The Charity Commission has accepted our change to CIO status and we would like to thank our outgoing Trustee Tom Crellin for his work on this project.

**Advice and information:** Following receipt of legal advice we have updated all of our fact sheets and advice to be reflecting of new guidance in England and the needs of home educating families and other stakeholders. These became live following the end of this financial year, but have been circulated in the meantime via our Facebook group to a positive reception.

**Coronavirus:** Education Otherwise is proud to have taken our part in supporting families throughout the recent Covid 19 pandemic. In addition to developing website resources for families, we produced and circulated an advice sheet to all local authorities in England and Wales, which was disseminated amongst the families of school children learning at home. This met with a universally positive response from the DfE, local authorities and families alike.

In addition, trustees have consulted with and advised the Welsh Assembly Government, OFQUAL and the DfE in respect of issues affecting home educating families.

## **Financial Review**

### **Income**

Income from all sources is slightly down on the previous year. This is primarily because of a one off donation that was received during the previous financial year to this one.

Membership income continued to show a decline from £6,574 last year to £5,145 this year, but with indicators of this beginning to rise as Covid 19 resulted in more families considering home education for their children. Given the recent highly visible activity by the charity, we would expect membership to rise during the coming year.

### **Expenditure**

Ordinary operating expenditure this year is £4,790, a modest increase from last year at £4,638. The addition of one off expense for the valuable advice from counsel, at £1,200 brings our overall costs this year to £5,990, which is considerably lower than

last year's figure of £7,638. Please note that some items of prospective expenditure have yet to be confirmed.

### **Balances**

Overall, the charity had a small deficit of £453 this year. Overall, funds held amount to £37,799, which is more than three years' turnover at current levels.

### **Principal sources of funds**

The principal source of funds remains the sale of memberships. Many members also round-up their membership fees to provide a small donation. The charity also charges a small fee for local groups to be included under the cover of its insurance policy and a significant portion of the annual insurance fee is covered by this income.

The charity has recently commenced a fund raising drive through registration with 'Easyfundraiser' a platform which provides a small donation to Education Otherwise when registered users shop online at a wide range of outlets. Further fund raising initiatives are in hand and show promise of being productive.

### **Principal Risks**

Decline in income from memberships continues to be a concern, although early signs of increasing member applications are promising. Whilst we have the funds to weather a decline in membership for some time, trustees consider it important to develop further fund raising strategies as urgently as possible, together with raising the profile of the charity. Our new website development is expected to support this objective.

### **Reserves**

The charity currently holds reserves amounting to approximately three years' expenditure. The trustees consider this to be more than adequate and are actively considering ways in which these funds can be used to better support our aims and objectives.

### **Going concern**

The charity's financial position remains secure with no uncertainty about remaining a going concern.

## **Structure, Governance and Management**

### **Constitution**

Education Otherwise Association is a Charitable Incorporated Organisation and is not linked with any other organisation.

### **Membership**

Membership is by annual subscription and is open to individuals and organisations involved with, or having an interest in home education. Currently, only signed up

members have voting rights and we are seeking to extend those rights to a wider membership, in order to increase our democratic approach to governance.

### **Register of Members.**

### **Recruitment and Appointment of Trustees**

Trustees are recruited from members who have usually been involved as volunteers at a local or national level. Potential trustees are proposed to the AGM. Trustees are appointed for a term of three years, although they may be co-opted between AGMs. Co-opted trustees must stand down, or stand for election at the next AGM. A third of elected trustees are required to stand down by rotation at each AGM.

There is policy in place to ensure that potential trustees meet basic eligibility criteria before being proposed for election or co-opted.

### **Trustee Induction and Training**

New trustees are provided with information about their role and responsibilities as Trustees via the Trustee forum and electronic documentation from the Charity Commission.

### **Reference and Administration**

Trustees for the period 1st July 2019 to 30th June 2020

Joined during the period

- Carol Dyer (Co-opted 27<sup>th</sup> April 2020)
- Kate Woodley (Co-opted 22<sup>nd</sup> July, included for completeness)
- **W. Charles-Warner (Co-opted September 2019. Confirmed 12<sup>th</sup> October 2019)**
- **A. Neil (Co-opted September 2019. Confirmed 12<sup>th</sup> October 2019)**

Continuing in post throughout the period

- T. Crellin
- F. Mukwamba-Sendall

Retired during the period

- G. Evans **Graeme Evans' retirement confirmed as being July 2020**

### **Trustees responsibilities for the preparation of the financial statements**

The trustees (who were also directors for the purpose of company law during part of this accounting period) are responsible for preparing the trustees report and financial statements in accordance with applicable law and United Kingdom accounting standards. Company law requires the trustees to prepare accounts for each financial year which give a true and fair view of the state of affairs of the charitable company and of incoming resources and application of resources, including income and expenditure of the charitable company for that period. In preparing those statements, the trustees are required to:

- Select suitable accounting policies and apply them consistently

- Observe the methods and principles in the Charities SORP
- Make judgements and estimates that are reasonable and prudent
- State whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements
- Prepare financial statements on the going concern basis unless it is inappropriate to presume the company will continue in business

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the Company (during the period for which the charity remained a company) and which enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the trustees are aware, there is no relevant information of which the company's independent examiners are unaware and the trustees have taken all reasonable steps they ought to have taken, in order to make themselves aware of any relevant information and to establish that the examiners are aware of the information.

The accounts have been prepared in accordance with the provisions of the Companies Act 2006 and the Charities SORP.

#### Declarations

The trustees declare that they have approved the trustees report above  
Fe Mukwamba-Sendall, Tom Crellin, Wendy Charles-Warner, Ambroz Neil, Carol Dyer and Kate Woodley.

30th September 2020