



Education Otherwise Association
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Trustees' Annual Report for the period ending 30th June 2021

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 and social 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, promote and support 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 publicly accessible website as well as through the public helpline and our social media group. Support and information are provided to members, home educators, the media, local and national government and other interested parties including voluntary agencies. In addition, members can opt in to receive news updates, take advantage of our free report checking services email 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.

During 2020 to 2021 the helpline was upgraded to a new service which has provided a more flexible platform to the trustees and volunteers, this at a slightly reduced cost.

The number of calls answered during this period was exceptionally high, at times up to twelve times the usual caller rate. This increase has been primarily as a result of more individuals considering home education during lockdown periods.

Website: Our website receives an increasing level of traffic, which has continued to be at high levels throughout the year. Trustees were very excited by the launch of our new website, which has brought a more user friendly and modern look to the charity. This has been received favourably from all quarters.

Advice and information: Following receipt of legal advice all of our fact sheets and information were updated to reflect the needs of home educating families and other stakeholders.

Consultations and stakeholder involvement

We gave both written and oral evidence to the Education Committee inquiry into home education which was extremely well received by members and service users.

Trustees argued persuasively for inclusive examination result access for home educating families. This included frequent meetings with OFQUAL, examination boards and Government representatives.

We have met with a number of public bodies and agencies to raise concerns on behalf of our members and service users.

We have widened our contact base with public bodies and organisations in order to further the needs of our members and service users.

Initiatives

At the close of the year, we launched the Kit award for excellence. This award seeks to encourage excellence in local authority home education

practice. Nominations are made by home educating families and awards are based on those nominations. Awards will be made during the upcoming financial year.

Financial Review

Income

Income from all sources is significantly up on the previous year at £10,495.53 compared to £5,537 in 2019 to 2020.

In addition, a £5,000 payment was received from Portsmouth Home Education Group (PHEG) in partial reimbursement of a grant made by the charity.

Membership and general donation income rose significantly from £5,145 last year to £10,467.67 in the year to June 2021. There are indications that membership is continuing to grow with new members having joined during the period following end of year.

Expenditure

Ordinary operating expenditure this year is £5,961.52, a modest increase from last year at £4,790. This expenditure includes a significant cost incurred to renew and update the charity website in order to bring our public facing material into a more user friendly and modern format.

Trustees incurred £8,000 expenditure in the making of a conditional grant to PHEG for funding initial legal costs in taking Judicial review. This was conditional to funds being repaid if sufficient was raised from other sources. £5,000 was repaid within the financial year. The case coming before the court will clarify the duties of local authority staff and parents, providing important guidance for how the charity informs and supports home educating families in the future.

Balances

Overall, the charity had a surplus of £1533.81 during the financial year, a significant improvement on the deficit of £453 during the previous financial year. Overall, funds held amount to £39,448.26 which is more than six years of operating expenditure at current levels.

Principal sources of funds

The principal source of funds remains the sale of memberships, together with donations from members and the public. These latter increased throughout the year following introduction of fundraising initiatives. The charity also charges a small fee for local groups to be included under the cover of its insurance policy and a portion of the annual insurance fee is covered by this income.

Principal Risks

Possible future decline in income from memberships is a concern which has arisen in previous years, but buoyant membership uptake shows

promise for future years. Trustees remain vigilant to the possibility of the 'Covid effect' reducing and membership numbers falling in the future.

Reserves

The charity currently holds reserves amounting to approximately six 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. Voting rights have been opened to all members upon application in order to increase our democratic approach to governance.

Recruitment and Appointment of Trustees

Trustees are recruited from members who have requisite skills and abilities to support the charity today and into the future. All trustees must be registered members of the charity at the time of appointment. 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 following AGM. A third of elected trustees are currently required to stand down by rotation at each AGM.

There is a stringent interview procedure in place to ensure that potential trustees meet 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 handbook, trustee forum and remote meetings.

Trustee Associate Role

The charity has established an additional group of officers, trustee associates, to support trustees in their respective roles and responsibilities. The position of Trustee associates underpins the charity's succession plans.

Reference and Administration

Trustees for the period 1st July 2020 to 30th June 2021

Joined during the period

- Kate Woodley (Co-opted 22nd July 2021. Confirmed at AGM 16th October 2020)
- Helena Wilson (Co-opted 15th October 2020, confirmed at AGM 16th October 2020)

Continuing in post throughout the period

- F. Mukwamba-Sendall
- W. Charles-Warner (Co-opted September 2019. Confirmed 12th October 2019)
- A. Neil (Co-opted September 2019. Confirmed 12th October 2019)
- Carol Dyer (Co-opted 27th April 2020)

Retired during the period

- Carol Dyer (Retired 30th June 2021)

Trustees' responsibilities for the preparation of the financial statements

The trustees are responsible for preparing the trustees report and financial statements in accordance with applicable law and United Kingdom accounting standards.

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.

The accounts have been prepared in accordance with the provisions of the Charities SORP.

Declarations

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

6th August 2021

Accounts 2020 to 2021

Closing balance 2020	39,971
Creditors due recorded last year	-2,172
Balance brought forward	37,799
Creditors due recorded last year	2,172
Actual creditors due and paid in the 12 month period	2056.55
Difference	115.45
Actual balance brought forward	37,914.45

Income

Membership fees and donations	15467.67
Interest	27.66
Total income	15495.33

Outgoings

IT and tech	4058.96
Refund member fees	2.00
Miscellaneous	667.80
Insurance	830.36
Grant to PCC	3000
Grant to PCC	5000
Postage and stationery expenses	236.75
	165.65
Total outgoings	13961.52

Opening balance	-37,914.45
Closing balance	39,448.26
Profit	1,533.81

**Amount to carry forward:
£39,448.26**

Income	15495.33
Outgoings	-13961.52
Profit	1,533.81

Recognition of income

Income is included when the charity becomes entitled to the resources; it is more likely than not that the trustees will receive the resources and the monetary value can be measured with sufficient reliability.

Grants and donations

Grants and donations are only included when the general income recognition criteria are met. The charity has not received government grants in the reporting period.

Support costs

The charity has incurred expenditure on support costs.

Volunteer help

The value of any voluntary help received is not included in the accounts but is described in the trustees' annual report.

Income from interest, royalties and dividends

This is included in the accounts when receipt is probable and the amount receivable can be measured reliably. No royalties or dividends have been received during the financial year.

Income from membership subscriptions

Membership subscriptions which give a member the right to services or other benefits are recognised as income earned from the provision of goods and services as income from charitable activities.

Liability recognition

Liabilities are recognised where it is more likely than not that there is a legal or constructive obligation committing the charity to pay out resources and the amount of the obligation can be measured with reasonable certainty. No liabilities are due in the next twelve months.

Redundancy cost

The charity made no redundancy payments during the reporting period.

Deferred income

No material item of deferred income has been included in the accounts.

Creditors

The charity has no current creditors

Provisions for liabilities

The charity has no current liabilities.

Debtors

The charity has no current debtors

Current asset investments

The charity has no investments holding its monetary assets in bank accounts (deposit and savings).

Material assets

Two telephones of nominal value.

Transactions with trustees and related parties

No trustees have been paid any remuneration or received any other benefits from an employment with their charity or a related entity

The trustees confirm acceptance of the accounts.

Fe Mukwamba-Sendall, Ambroz Neil, Wendy Charles-Warner, Helena Wilson and Kate Woodley