

# SCHOOLS UT



**Annual Report  
to 31 December 2015**

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## 1. INTRODUCTION

The Trustees of Schools OUT United Kingdom (hereinafter "SOUK"), present their annual report and accounts for the year ended 31 December 2015 and confirm they comply with the requirements of the Charities Act 1993, as amended by the Charities Act 2006, the Constitution and the Charities SORP 2005.

## 2. AIMS

SOUK operates under a constitution dated 18 September 2013 (the "Constitution"). The objects of SOUK are to promote equality and diversity for the benefit of the public by:

- (A) increasing the visibility of lesbian, gay, bisexual and transgender ("LGBT") people, their history, lives and their experiences in the curriculum and culture of educational and other institutions, and the wider community;
- (B) raising awareness and advancing education on matters affecting the LGBT community;
- (C) working to make educational and other institutions safe spaces for all LGBT communities; and
- (D) promoting the welfare of LGBT people, by ensuring that the education system recognises and enables LGBT people to achieve their full potential, so they contribute fully to society and lead fulfilled lives, thus benefiting society as a whole.

SOUK aims to achieve these objects by organising an annual Lesbian, Gay, Bisexual and Transgender (or "LGBT") History Month each February, to be celebrated in schools, other educational establishments, workplaces, and other communities in the United Kingdom.

LGBT history month is launched at a formal event in the November preceding LGBT History Month. Linked to LGBT History Month, SOUK aims to coordinate and share knowledge of events planned throughout the country in connection with LGBT History Month, and provide resources to augment the theme of LGBT History Month.

More broadly, to raise awareness of LGBT issues and to increase the visibility of LGBT people in the classroom, SOUK aims to provide a number of inclusive teaching resources for use in classrooms around the country, via a dedicated website

In addition, in order to increase the visibility of LGBT people, their history, lives and experiences, the "new" initiative that began in 2015, namely a National Festival of LGBT History, has been developed and expanded upon. This festival was celebrated in only one city in 2015. However, in 2016, the festival was celebrated in six locations cities across the United Kingdom: London, Bristol, Shrewsbury, York, Newcastle, Manchester, representing a significant increase in exposure for SOUK, and a significant furtherance of SOUK's objects, particularly in relation to education, "usualisation" and visibility.

### 3. **ADMINISTRATIVE INFORMATION**

Schools OUT United Kingdom, is a Charitable Incorporated Organisation (registration no. 1156352).

The principal address of SOUK is BM Schools OUT, London, WC1N 3XX

SOUK receives pro bono legal assistance from Simmons & Simmons LLP, CityPoint, 1 Ropemaker Street, London EC2Y 9SS.

None of the Trustees is a body corporate. The Trustees are:

- Professor Ian Rivers;
- Adrian Dykes (resigned 31 July 2016);
- Stephen Boyce;
- Wanda Wyproska; and
- Margaret (Max) Hyde.

Wanda Wyproska was appointed Trustee on 31 July 2016. The procedures for appointing Trustees are set out in the Constitution.



#### 4. **STRUCTURE, GOVERNANCE AND MANAGEMENT**

SOUK became a registered Charitable Incorporated Organisation on 25 March 2014. This is the second Trustees' Annual Report prepared for SOUK. It covers the period 01 January 2015 to 31 December 2016.

The Trustees (who are also the Members under the Constitution) were appointed under the terms of the Constitution, which is based on the Foundation Model Constitution published by the Charities Commission. During 2014 there were no changes to the Trustees. There have been some changes to the Trustees/Members. However, three of the original Trustees remain from the initial appointment under the Constitution.

The Trustees are responsible for the management of the affairs of SOUK and for that purpose exercise all the powers of SOUK. In order to provide a degree of continuity during the transition to a CIO, the Management Committee of the predecessor organisation was appointed by the Trustees to exercise some of the day-to-day management tasks of SOUK. In particular, under the supervision of the Trustees, the Management Committee has been delegated the tasks of:

- (A) managing the day to day business of SOUK;
- (B) meeting at least quarterly to discuss the business of the Management Committee and SOUK;
- (C) preparing meeting minutes for all meetings of the Management Committee (such minutes to be provided to the Trustees within seven days of such a meeting);
- (D) transferring the assets of *Schools OUT* (the predecessor organisation – an unincorporated association) to SOUK;
- (E) organising a themed LGBT history month to take place in schools, educational establishments or other organisations in February of each year;
- (F) organising a pre-launch event in advance of each LGBT history month;
- (G) managing the budget of SOUK;
- (H) embarking on fundraising initiatives to benefit SOUK;
- (I) managing the website content at the following websites:
  - (1) [www.schools-out.org.uk](http://www.schools-out.org.uk)
  - (2) <http://lgbthistorymonth.org.uk/>
  - (3) <http://the-classroom.org.uk/>
- (J) preparing the annual statement of accounts;
- (K) preparing an annual report to the Trustees;



- (L) preparing and file any reports required by the Charity Commission (such reports being approved by the Trustees before filing);
- (M) entering into contracts for the purpose of carrying out the tasks and functions delegated to the Management Committee; and
- (N) delegating any of its powers, as it deems appropriate, subject to these terms and conditions.

The Management Committee comprises [fourteen] volunteers who provide their time, support, skills and energy to SOUK. None of the Management Committee is paid for their time. Currently, the Management Committee comprises:

- Seth Atkin
- Steve Boyce\*
- Nicholas Chinardet
- Andrew Dobbin
- Laila El-Metoui
- Jeff Evans
- Huw Williams
- Elizabeth Wallis
- Adam Lowe
- Stephen Bentley†
- Sue Sanders
- Wanda Wyporska
- Antony Fenwick
- Dan Vo
- Chris Ryan

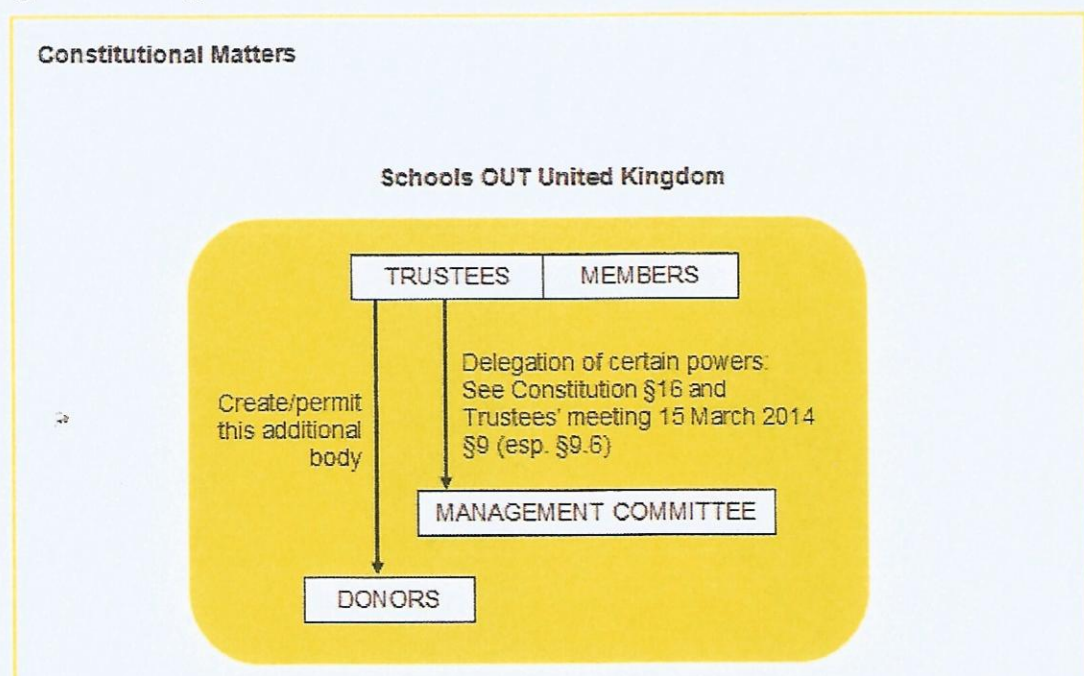
\* Steve Boyce and Wanda Wyporska are the Trustees' representatives on the Management Committee.

† Stephen Bentley is an accountant and assists with SOUK's accounts.

As a matter of efficiency, given that the individuals involved with SOUK are volunteers, the Management Committee also includes a number of Sub-Committees with specific project responsibilities. These include a Finance Committee, Website & Communications, Fundraising, Membership, Teacher Resources and Publications Committee.

A small number of Donors (or Associate or Non-Voting Members) support SOUK. This group of individuals mainly comprises legacy members from the predecessor unincorporated association.

A diagram showing the constitutional structure of SOUK is shown below.





## 5. TRUSTEES' REPORT

Broadly, SOUK achieves its Objects via activities that have followed the course set by the predecessor organisation. Most significantly, this has included the launch of LGBT History Month 2016, maintaining and updating "LGBT friendly" teaching resources via the Classroom website, and in addition, a National Festival of LGBT History Month was organised for February 2016. Each of these is discussed below. Fulfilling these events and the maintaining the Classroom website are the cornerstone objectives of SOUK for the year 2015.

In conducting these activities, the Trustees, and indeed the Management Committee have had regard to the Charity Commission guidance on public benefit. The Trustees strongly believe that raising awareness and educating the public on both the LGBT community and the matters that affect LGBT people will not only increase visibility and promote the welfare of LGBT people, but also benefit the wider community by promoting inclusivity, diversity and acceptance.

There are other specific groups of non-LGBT people who directly benefit from the activities of SOUK. They include many non-LGBT people who are the children of LGBT parents or who have family members who are LGBT, and who are either bullied for this reason or are afraid to discuss their family situation. There are other non-LGBT people who are friends with LGBT people and are also bullied. The work of SOUK therefore directly affects those who know and live with the LGBT people, and those who know and live with these people. The work of SOUK in education institutions, therefore, goes much wider than solely benefiting the LGBT people, and is not limited to those with a protected characteristic.



The launch of LGBT History Month 2016, themed *Religion, Philosophy and Belief*, took place in November 2015 at Cambridge University. This year's theme sought to explore subject matter that traditionally has not sat comfortably with the LGBT community, namely religion, interpreted broadly. It was attended by over 100 people from the educational and LGBT communities. It comprised a networking/fair where a number of related charities were represented, followed by an educational gala performance where the themes of LGBT History Month were explored.

As in previous years, pinning the theme against historical figures that related to the subject matter worked well.

In parallel to History Month itself, the LGBT History Month website is updated on a regular basis and provides thousands of people with up to date information on LGBT issues in general and are activities and provides resources that educates and inspires



a wide variety of people in this country and abroad to participate in enabling LGBT people to be safe and visible.



The Classroom website ([www.the-classroom.org.uk](http://www.the-classroom.org.uk)) offers a series of lesson plans to enable teachers to include the LGBT experience in six Key Stages across fourteen subject areas. The Classroom also presents simple but effective methodologies to enable teachers to be inclusive practitioners and promoters of equality and diversity. The lessons are designed to be simple so that no advanced equality or diversity training is needed in order to teach these lessons.

All of the SOUK team that wrote the lesson plans are qualified teachers and practitioners.

The Classroom is undergoing a constant updating process to maintain relevance and to meet the demands and expectations of the national curriculum.

There is a year on year increase in the number of unique users using the Classroom website. The use of these lesson plans by teachers in the UK assists with increasing the visibility of LGBT people, their history, lives and their experiences in the curriculum and culture of educational and other institutions, and the wider community and raises awareness and on matters affecting the LGBT community among the public more generally.



After a hugely successful "experimental" festival in 2015, a second National Festival of LGBT History (the "National Festival") took place in six towns/cities in England in February. This represented a huge increase in exposure for SOUK, and significantly assisted with the furthering of SOUK's objects. The Trustees are grateful to all of those who assisted with the organisational aspects of the National Festival, particularly to Jeff Evans, whose vision and hard work made these events a success.

The National Festival will comprise a number of academic, educational, family and entertainment strands that seek to increase the visibility of LGBT people, their history, lives and their experiences within the wider community.

A number of teachers, educators, LGBT activists, and members of the public more generally are welcome at the National Festival.



SOUK will host the Schools & Families festival strand whereby children, educators, parents and governors can participate in a number of educational, fun, and inclusive LGBT-themed activities.

### **Other significant initiatives**

SOUK has worked with a number of other LGBT charities and educational organisations including the Forum for Sexual Orientation and Gender Identity Equality in Further and Higher Education to continue to develop and distribute an LGBT History Chronology Poster which charts significant milestones in LGBT history in the United Kingdom.

The aim has been to produce a resource to support those raising awareness of sexual orientation and gender identity equality and diversity. The poster highlights important legal milestones and identifies visible and significant contributions made by individuals and groups.

SOUK, and the co-authoring organisations are working to have this poster available in all schools and in other educational institutes throughout the United Kingdom.

### **Fundraising and support**

The Trustees are grateful to the many private, corporate and Union donors who have supported SOUK over the past year. Their generous and ongoing support has been tremendously helpful in enabling SOUK to achieve its Objects of promoting equality and diversity for the benefit of the public.

The Trustees are grateful to the many teachers who use the resources provided by SOUK to increasing the visibility of lesbian, gay, bisexual and transgender ("LGBT") people, their history, lives and their experiences in the curriculum and culture of educational and other institutions, and the wider community in the United Kingdom.

Finally, all work done by the Management Committee is performed by volunteers. The Trustees are grateful for their enthusiasm, time and commitment to the Objects of SOUK. In particular, the Trustees are especially thankful to Tony Fenwick for his leadership and support over the last year.

### **The future**

Challenges for the future include:

- continuing to ensure a constant stream of income from fundraising activities and grants so that the objects can be fulfilled;
- ensuring stability within the Management Committee, given the voluntary nature of the work undertaken by individuals in this committee and in the likelihood that senior individuals will step back from active roles in the near future;
- continuing to ensure that the Classroom website is updated on a timely basis and to cater for changes to the curriculum;
- measuring the effectiveness of SOUK's activities against its Objects;
- developing to SOUK's to the next level, so that the Objects can be furthered to a greater degree; and
- maintaining relevance in the United Kingdom as a result of perceived or actual *usualisation* of the LGBT community.



## 6. **ACCOUNTS**

A copy of the accounts is included in this Annual Report. For administrative reasons, the accounting reference period was changed such that the accounting year of SOUK ends on 31 March, rather than 31 December. Therefore, the accounts filed represent a transitional period of fifteen months, i.e. accounts were prepared for the period 01 January 2015 to 31 March 2016 (the new end date for the financial year). SOUK will now operate a financial year from 1st April to 31st March each year going forward.

Significant expenses comprised production and distribution costs associated with the National Festival and the LGBT History Month launch. As a national organisation, with individuals located around the United Kingdom, travel also comprised a significant expense.

Overall, SOUK saw a surplus for the period of £25,121.

There is no requirement for the accounts to be audited.

## 7. **RISKS**

The Charity Commission recommends that DBS (CRB) checks should be obtained for trustees of charities which work with children or vulnerable adults. It is possible, although unlikely, that the work of the Trustees and/or the Management Committee could bring them into contact with children or vulnerable adults. However, the position of trustee of a children or vulnerable adult charity is not a regulated activity in itself. It is only if trustees have close and unsupervised contact with beneficiaries that they would fall within the scope of regulated activity and be eligible to obtain an enhanced DBS (CRB) check and barred list check.

SOUK is not a children's or vulnerable adult's charity and the Trustees, in their capacities as trustees of SOUK, and the Management Committee, in their capacities as members of the Management Committee do not have close and unsupervised contact with children or vulnerable adults. At this time, enhanced DBS (CRB) and barred list checks of the Trustees and the Management Committee are not conducted. However, this policy is kept under review by the Trustees.

## **THE TRUSTEES**

31 October 2016







### A3 Payments

Accommodation	536	-	-	536	1,491
Awards4All	5,250	-	-	5,250	
Badges	2,035	-	-	2,035	
Ben Cohen	6,193	-	-	6,193	-
Classroom	1,000	-	-	1,000	
Events	406	-	-	406	
Grant Repayment	2,246	-	-	2,246	
HLF	750	-	-	750	
Insurance	643	-	-	643	555
LGBT History Festival 2015	5,534	-	-	5,534	
LGBT History Festival 2016	807	-	-	807	
LGBT HM Launch	5,856	-	-	5,856	
LGBTHM Fest16	2,388	-	-	2,388	
Meetings	1,459	-	-	1,459	
Misc / Unknown	1,153	-	-	1,153	1,518
Northern Hub LGBT Fest 16	678	-	-	678	
Postage	328	-	-	328	730
Residential 11-12 July 15	2,711	-	-	2,711	
S&S	806	-	-	806	
Stationery	160	-	-	160	
Sustenance	12	-	-	12	
Travel	1,630	-	-	1,630	3,567
Website costs		-	-	-	1,189
Telephone		-	-	-	13
Production & Distribution costs		-	-	-	3,580
Conferences & Training		-	-	-	2,837
Fund Raising Expenses		-	-	-	135
<b>Sub total</b>	<b>42,583</b>	<b>-</b>	<b>-</b>	<b>42,583</b>	<b>15,616</b>

### A4 Asset and investment purchases, (see table)

	-	-	-	-	
	-	-	-	-	
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	

<b>Total payments</b>	<b>42,583</b>	<b>-</b>	<b>-</b>	<b>42,583</b>	<b>15,616</b>
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<b>Net of receipts/(payments)</b>	<b>8,952</b>	<b>-</b>	<b>-</b>	<b>8,952</b>	<b>16,170</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>16,170</b>	<b>-</b>	<b>-</b>	<b>16,170</b>	<b>-</b>
<b>Cash funds this year end</b>	<b>25,121</b>	<b>-</b>	<b>-</b>	<b>25,121</b>	<b>16,170</b>

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Schools Out bank account	9,360	-	-
	LGBT HM bank account	10,726	-	-
	Savings account	5,036	-	-
	<b>Total cash funds</b>	<b>25,121.35</b>	<b>-</b>	<b>-</b>

(agree balances with receipts and payments account(s))



**1. FINANCIAL PERFORMANCE**

**1.1. Income and Expenditure Full Year**

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Quarter 5	Total
<b>Income</b>						
Badges	983.26	731.50	467.72	244.00	981.00	3,407.48
Classroom	0.00	1,000.00	1,000.00	0.00	0.00	2,000.00
Donations	1,197.05	399.10	1,004.20	6,368.00	362.00	9,330.35
Grants	0.00	10,000.00	0.00	3,000.00	0.00	13,000.00
Interest	6.18	6.32	6.32	6.26	6.25	31.33
LGBTHM Conference	4,737.51	2,500.00	0.00	0.00	0.00	7,237.51
LGBTHM Fest 16	0.00	1,500.00	1,000.00	2,650.00	5,900.00	11,050.00
LGBTHM Launch	0.00	0.00	1,500.00	505.00	0.00	2,005.00
Northern LGBTHM Fest16	0.00	0.00	0.00	0.00	900.00	900.00
Membership	80.00	98.00	0.00	0.00	500.00	678.00
Tickets	0.00	0.00	0.00	0.00	235.24	235.24
Misc / Unknown	285.00	97.00	500.00	278.00	500.00	1,660.00
	<b>7,289.00</b>	<b>16,331.92</b>	<b>5,478.24</b>	<b>13,051.26</b>	<b>9,384.49</b>	<b>51,534.91</b>
<b>Expenditure</b>						
Accommodation	536.00	0.00	0.00	0.00	0.00	536.00
Awards4All	0.00	0.00	2,250.00	750.00	2,250.00	5,250.00
Badges	423.30	1,612.00	0.00	0.00	0.00	2,035.30
Ben Cohen	0.00	0.00	0.00	0.00	6,193.28	6,193.28
Classroom	0.00	1,000.00	0.00	0.00	0.00	1,000.00
Events	30.00	160.00	5.24	210.60	0.00	405.84
Grant Repayment	0.00	0.00	0.00	0.00	2,246.32	2,246.32
HLF	0.00	0.00	0.00	0.00	750.00	750.00
Insurance	59.97	59.97	402.97	59.97	59.97	642.85
LGBT History Festival 2015	5,237.20	297.07	0.00	0.00	0.00	5,534.27
LGBT History Festival 2016	0.00	243.24	480.33	83.76	0.00	807.33
LGBT HM Launch	0.00	0.00	91.23	5,764.44	0.00	5,855.67
LGBTHM Fest16	0.00	0.00	0.00	0.00	2,388.30	2,388.30
Meetings	282.66	765.70	42.30	160.20	208.18	1,459.04
Misc / Unknown	315.24	0.00	181.79	47.00	609.31	1,153.34
Northern Hub LGBT Fest 16	0.00	0.00	0.00	0.00	678.48	678.48
Postage	25.68	224.03	61.33	0.00	16.61	327.65
Residential 11-12 July 15	0.00	0.00	2,711.09	0.00	0.00	2,711.09
S&S	0.00	0.00	0.00	0.00	806.35	806.35
Stationery	3.99	23.47	51.77	34.47	46.75	160.45
Sustenance	0.00	9.50	0.00	2.40	0.00	11.90
Travel	987.48	136.00	192.49	131.85	181.93	1,629.75
	<b>7,901.52</b>	<b>4,530.98</b>	<b>6,470.54</b>	<b>7,244.69</b>	<b>16,435.48</b>	<b>42,583.21</b>
<b>Surplus / (Deficit)</b>	<b>-612.52</b>	<b>11,800.94</b>	<b>-992.30</b>	<b>5,806.57</b>	<b>-7,050.99</b>	<b>8,951.70</b>



## 1.2 Performance Comparison to Previous Years

	2015	2014	2013	2012
Receipts	51,535	22,748	22,378	23,186
Payments	42,583	22,108	18,065	16,517
Surplus	8,952	640	2,290	6,669

## 1.3. Cash Balances as at 31<sup>st</sup> March 2016

Schools Out	9,359.91
LGBTHM	10,725.50
Savings	5,035.94
	<u>25,121.35</u>

## 1.4. Meeting Costs

Meeting Date	Meeting Location	Total Cost	No of Claimants	Average Cost Per Claimant
10/01/2015	Manchester	5,534.27	4	1,383.57
18/04/2015	London	807.33	6	134.56
13/06/2015	Birmingham	5,855.67	3	1,951.89
10/10/2015	London	2,388.30	6	398.05
09/01/2016	Manchester	208.18	2	104.09
18/04/2016	London	610.42	6	101.74

## 2. NEWS

### 2.1 Handover

Kat and Pauline have now stood down, with Stephen and Kathy taking over. This report and the year-end accounts are the last pieces of work to be completed. The year end accounts have been completed for Schools Out to file with Charities Commission.

### 2.2 Finance Policy

The policy was updated following the residential. This is with Adrian awaiting him to cast his legal eye over it. Once finalised, the new policy with a summary of changes should be distributed to all members of the management committee as well as trustees.

### 2.3 Financial Year

The 2015 financial year continued until 31<sup>st</sup> March 2016, making this a 15 month year. Schools Out will now operate a financial year from 1<sup>st</sup> April to 31<sup>st</sup> March each year going forward.