



# Causeway Education Ltd

## Report and Financial Statements for the Year Ended 31 March 2020

Company Number England 09239703

Charity Number England and Wales 1175109

Charity Number Scotland SCO48038

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# 2019-2020 Highlights

Supporting young people to overcome barriers in accessing higher education

## OUR SUPPORT IS HIGH-QUALITY AND PRACTICAL

In the past year we have

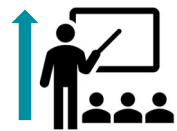
Given expert support to **189 schools**

(2019: 167)



Delivered high quality workshops to **780 professionals**

(2019: 709)



Improved progression to **Russell Group** universities for our students<sup>1</sup>

**62%** accepted a place via Academic Apprenticeships

(vs 44% control group)

**78%** received an offer via Progression Specialist Mentoring

(vs 71% control group)



The **Sutton Trust Teacher Champions** programme was launched this year. Reaching new schools in two areas of the UK. Our launch events achieved a **100%** feedback rate of **Excellent** or **Good**.

## WE ARE COLLABERATIVE AND EVIDENCE-LED

Our **Research** this year has shown greater emphasis on young people recognising student ambassadors as being a key influence in going to University. As a response, we have begun **Student Ambassador Training**. Initially partnering with Aspire to HE, based in Wolverhampton, we have delivered three high-quality training sessions.

We have also identified that young people desire more access to **Degree Apprenticeships**. Together with Queen Mary University, Causeway has begun piloting a series of workshops designed to increase the chances of disadvantaged young people gaining access to these sought-after programmes.

Further information on our impact and achievements can be found on pages 9-12.

**We exist to make sure that progression is not determined by privilege**

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<sup>1</sup> This information has been derived from the Universities and Colleges Admissions Service STROBE analytical data service.

# Company information

## Trustees

- Andrea Carr (Chair)
- Natalie Perera
- Mattia Romani (Resigned 17 January 2020)
- Natalie Whitty
- Jamie Potter
- Vonnie Sandlan (Resigned 22 July 2019)
- Michael England
- Iain Littlejohn (Appointed 22 April 2020)
- Angela Newton (Appointed 22 April 2020)
- Christine Kinnear (Appointed 8 July 2020)

## Registered office

NCC Space  
New City College  
Falkirk Street  
London  
N1 6HQ

## Independent Examiners

S M Robinson  
Kreston Reeves  
24 Chiswell Street  
London  
EC1Y 4YX

## Bank

Unity Trust Bank  
4 Brindley Place  
Birmingham  
B1 2JB

## Directors and key personnel

- Sam Holmes, CEO
- Helen Drummond, Director of Partnerships
- Katie Buckingham, Head of Programmes
- Farrell Monk, Head of Finance

# Trustees' report

## Our mission

Supporting young people to overcome barriers in accessing higher education.

We exist to make sure that progression is not determined by privilege.

With the right support in exploration, choices and applications, all young people can find and realise their ambition.

In our unequal society, some young people face far greater challenges than others in accessing higher education. Dedicated teachers, advisors and outreach professionals work tirelessly on redressing these inequalities. We are there for all those confronting these barriers, helping to bring about:

- 1. Expert support**

We give teachers the skills and resources they need to ensure all their students can navigate HE applications effectively.

- 2. Transformational outreach**

We help universities, charities and corporates to develop initiatives which inspire *and* equip participants to take their next steps.

- 3. Outstanding applications**

We support students directly, providing impactful workshops and mentoring to help them successfully clear the hurdles of a complex application process.

## Public benefit statement

The only objects for which the Charity is established are for the public benefit to promote the education of people under the age of 25 in the UK in particular but not exclusively by increasing the chances of students accessing higher education, further training, apprenticeships and careers.

# Our values

## Our work is:

### 1. High-quality

*Our impact is greatest when the quality of our work is highest.*

- We bring strong expertise in the areas where we work.
- We are passionate about what we do, and this motivates us to strive for constant improvement.
- We believe high quality is achieved through an open, honest and critical approach to our own work and that of our partners.

### 2. Collaborative

*Our mission is shared by a vast range of individuals and organisations – through supporting each other we can reach more individuals with higher quality interventions.*

- Everyone we work with is a partner.
- We work hard to understand our partners, recognise their expertise and speak a common language.
- We are approachable and empowering in the support we provide.

### 3. Practical

*Take-up of our support is greatest when it is easy to implement.*

- We provide actionable support to partners in the form of user-friendly tools and sector-leading resources
- We apply our extensive first-hand experience of working with schools, colleges and universities to develop frictionless strategies for improving application support

### 4. Evidence-led

*The best solutions build on the greatest accumulation of insights*

- We take time to understand problems in detail, identify needs and form considered solutions
- We apply insights from published research as well as our own evaluation data and practical experience

## Our key programmes

Our work at Causeway falls into three main strands:

1. Training, research and consultancy for teachers and outreach professionals at universities, charities and corporates
2. Workshops and mentoring for students
3. Practical resources

Our key programmes in each of these areas are outlined below.

### **Training, research and consultancy**

#### *Access Champions*

Our Access Champions programme trains a lead teacher to make lasting changes to the systems that support their students as they prepare for the transition to Higher Education. We focus on teachers because, as key influencers who have day-to-day contact with students, they can act as powerful advocates for Higher Education. However, disparities in school systems produce unequal outcomes for students: research shows that guidance for students at low-progression<sup>2</sup> schools can be ad hoc and sometimes deficient.

Our Access Champions programme builds on research into high-progression schools. It's a two-year intervention that develops and embeds excellent systems and practices in the schools which need it most. A key feature in some participating schools is the use of Progression Specialists – experienced educationalists – who provide intensive mentoring to targeted students.

We have been delivering Access Champions with funding from the Sutton Trust and as part of the National Collaborative Outreach Programme (NCOP).

#### *Sutton Trust Teacher Champions*

The Sutton Trust Teacher Champions Programme supports schools and 6th form colleges to increase progression to competitive HE courses through carrying out 10 key actions over an academic year. These focus on enhancing ongoing systems of support for students and have been distilled from analysis of relevant research, as well as Causeway's extensive experience in this area.

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<sup>2</sup> The Department for Education (DfE) publishes destination data for all schools in England each year (<https://www.gov.uk/government/collections/statistics-destinations>). This shows the proportion of students at each school who go to Higher Education, Apprenticeships, or employment after completing Key Stage 5, and allows us to identify schools where a low proportion of students progress to HE.

## Key features of the programme

- Initial training day covering fundamentals of effective support for HE progression
- Training and access to OSCAR, our online platform with its sector-leading personal statement tool
- Regular “nudge” emails highlighting the “step of the month” with accompanying resources
- Advanced practice training event including supporting highly competitive applications
- Moderation service for personal statements, references, staff training materials and student-facing resources

## Student workshops and mentoring

### *Academic Apprenticeship*

The Academic Apprenticeship supports students through the admissions process to Higher Education, particularly in the last, most decisive stages. Students follow subject-specific pathways developed by academics and teachers and get support from an expert mentor trained in applications. We deliver the programme at for Sutton Trust Summer Schools students at University College London, and on behalf of the Sutton Trust and the Wolfson Foundation to students across the UK.

### *Pathways to Law*

We deliver part of the Sutton Trust’s Pathways to Law programme, providing support to students on personal statements and the LNAT.

### *Smart Start/Smarter Futures*

We deliver elements of the Allen & Overy Smart Start and Smarter Futures Programme. This includes managing recruitment, as well as providing support to students on university course choices, academic enrichment and personal statements.

### *Access Ashurst*

We deliver workshops on personal statements and the LNAT as part of the Access Ashurst work experience scheme.

## Resources

### *OSCAR*

OSCAR (Online System for Completing Applications & References) is our online platform which has been designed with outstanding university applications in mind. OSCAR supports students to develop competitive, subject-focused personal statements and teachers to produce effective references. It allows students to submit drafts of their personal statement for review and teachers or mentors to submit line-by-line feedback and comments. OSCAR is a free tool available to all state schools in the UK.



# Key achievements in the year

## **Training, research and consultancy**

### *Designing Frameworks*

The Office for Students required all NCOPs to adopt a progressive framework to map outreach activities. This led to work with NEACO, updating their entire framework and creating a version for FE colleges. We also ran a consultation to design the framework for Shaping Futures, the Merseyside NCOP, and provided training to their staff team to implement it.

### *Widening Participation CPD series*

We held three evening events for WP practitioners to support their skill development in designing and delivering workshops. The events had great feedback and were a useful way to test the market for further work.

### *Ambassador Training*

We delivered three training sessions for the University of Wolverhampton's Aspire to HE Ambassadors. Feedback from all three events was excellent.

### *TCAT teacher training*

We developed and delivered new training sessions for teachers at The Challenge Academy Trust on behalf of Oxford University. These included: developing oracy through using unseen stimuli; using published research in Science enrichment; and literary translation in MFL enrichment.

## **Student workshops and mentoring**

### *Wadham project*

We delivered an academic literacy project for Year 10 students in Luton schools taking part in Wadham College's outreach programmes. The project was designed to help students navigate their choices at Key Stage 5 and develop skills in identifying significance when reading academic research. Students undertook a piece of academic research analysis which they turned into a voiceover to be inserted into a subject information video.

### *Smart Choices workshops*

We designed and delivered a series of events on behalf of Allen & Overy with the aim of encouraging more eligible year 12 students to apply for their Smart Start Work Experience Programme. Students attending these events took part in a range of interactive group activities which allowed them to assess the benefits of the opportunities available to them, find out how to demonstrate their commercial awareness in interviews and find out more about the Smart Start opportunity.

### *Degree Apprenticeship Pathway Pilot*

We began piloting a programme of support for students considering applying for Degree Apprenticeships. We delivered a series of workshops in partnership with Queen Mary University and Sir George Monoux 6<sup>th</sup> Form College, with the aim of equipping a group of students with the

skills, ambition, confidence and knowledge to make successful applications to degree apprenticeships.

## Resources

### *Wider reading directory*

We created a directory of wider reading for personal statements on our website and made this freely available to all. The webpage which contains links to recommended websites is designed to help students find and talk about a piece of research or wider reading in their chosen subject. Research has shown that university admissions tutors think a paragraph about wider reading is the most valuable part of a personal statement

## Impact highlights from FY 2019-2020

### *Academic Apprenticeship*

- The evaluation of the 2019 cohort of students on the Academic Apprenticeship programme showed that the programme achieved impact for participating students<sup>3</sup>. Using data provided by UCAS STROBE, we found that participating students were more likely to apply to, and then be placed at, Russell Group institutions than a control group of similar students.
- Our evaluation also demonstrated that the programme effectively supports students to apply to and be placed at competitive universities, as mentees on our programme were significantly more likely to apply to and be placed at Russell Group institutions. Out of our mentees who applied to HE, 83% applied to a Russell Group institution with 62% going on to be placed, compared with only 43% of students in the matched control group applying to a Russell Group institution and 44% of them going on to be placed.
- *“There is no downside to the Academic Apprenticeship. I would say it has been the most useful thing I could have in applying to university, and I feel lucky to have been able to access it to be honest.”* Student in the 2019 cohort.
- *“My mentor provided me helpful feedback for my personal statement by explaining why certain parts could be improved and suggesting how I could rewrite these parts to make it stand out more. Even slight changes in singular words made a huge difference. I really appreciate what my mentor has done for me.”* Student in the 2019 cohort.

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<sup>3</sup> Our evaluation tracked 157 students who had fully participated in the programme. We defined full participation as students who had received feedback on at least one draft of their personal statement from their online mentor and completed at least one of the suggested stages on the OSCAR platform.

### *Progression Specialist Mentoring*

- Our Progression Specialist mentoring programme has shown again to be effective in achieving offers for participating students<sup>4</sup>. Using data provided by UCAS STROBE, an evaluation of our second cohort found that 98% of mentees who applied to HE received an offer compared with 94% in the matched control group. There is also evidence that the programme helps students to achieve offers at competitive institutions, with 78% of mentees who applied to a Russell Group university receiving an offer compared with 71% in the matched control group.
- *“Having a mentor enabled me to feel greatly motivated and positive about my future in regard to current and further education. It also made me feel at ease about all of the future obstacles that I was stressing out about (e.g. student finance, personal statements, UCAS application). Having the mentoring sessions has made me feel really excited about the future.”* Student Cohort 2, Downend School, Bristol

### *Smart Start Recruitment*

- In 2019-20 we supported Allen & Overy with the student recruitment for their Smart Start programme. We successfully reached 36 schools and over 200 students, with over 50% making an application to the programme as a result of our outreach and recruitment events.

### *Sutton Trust Teacher Champions launch*

- In early 2020 we launched Sutton Trust Teacher Champions. We reached 30 new schools via our launch events and 100% of those who attended rated the events as Good or Outstanding.

### *Policy & Research highlights*

- We made a contribution to the Russell Group Pathways to Potential Report
- We submitted evidence to Education Select committee’s call for evidence into the impact of COVID-19 on children’s education and social care. We also contributed towards the Fair Education Alliance’s submission to this call and their submission to the Augar Response review

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<sup>4</sup> This evaluation data refers to the 681 students who attended 5-7 sessions with an expert mentor.

## Reach for the financial year 2019-2020

	Schools direct reach	Professionals direct reach	Students direct reach	Professionals indirect reach	Students indirect reach
Academic Apprenticeship	0	0	114	0	0
Academic Apprenticeship - Wolfson Programme	0	0	434	0	0
Personal Statement Workshops	0	0	301	0	0
Pathways to Law & Pathways to Banking & Finance	0	0	363	0	0
Allen & Overy Smart Start & Smarter Futures	36	0	276	0	0
Progression Specialist Mentoring in Nottinghamshire & Derbyshire	0	0	96	0	0
Progression Specialist Mentoring - Sutton Trust Programme in Herts/Essex	0	0	83	0	0
Degree Apprenticeship Pilot	1	0	36	0	0
Sutton Trust Teacher Champions	31	33	0	0	0
Access Champions	19	54	299	60	2806
OSCAR for Schools	57	513	1088	0	0
Other delivery	45	180	212	0	0
<b>Grand Total</b>	<b>189</b>	<b>780</b>	<b>3302</b>	<b>60</b>	<b>2806</b>

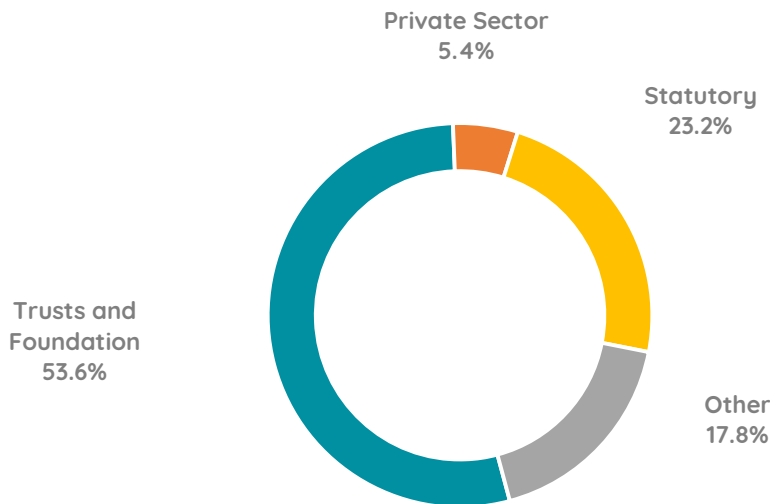
### Notes to accompany Reach:

Reach recorded for events delivered 1/4/2019 to 31/3/2020, defined as follows:

- **Schools:** A primary- or secondary-level educational institution with a DfE number (or equivalent), from which people – either staff or students – have benefitted from our services.
- **Professionals:** People we are training as part of their job, or as work they have volunteered to do, and who work with students.
- **Students:** Young people who we would consider the ‘end users’ of our services, such as our mentoring programmes and student-facing events
- **Direct reach:** People (or organisations) who we have directly worked with, trained, or mentored.
- **Indirect reach:** People who have benefitted second-hand from people we have reached directly (for example students who benefit from a professional, such as teacher, who we have trained). We currently only measure indirect reach for the Access Champions programme.
- **‘Other delivery’** covers one-off events that are not part of a larger programme, such as workshops, training sessions or events.

## How we are funded

Most of Causeway Education’s funding this year was through one of our key partners, The Sutton Trust, funding various programmes. These included Access Champions, Teacher Champions, Academic Apprenticeships, and the Online digital platform tool.



## Future strategic plans

For the last few years, we have been involved in delivering large programmes for various NCOP (now UniConnect) consortia. We increased our organisational capacity in line with this work, and have now streamlined our capacity as these programmes have drawn to a close. As part of this, the balance of our portfolio of work has shifted from a small number of large programmes, to a larger number of medium-sized projects.

Our key focus remains the achievement of systemic change in schools and colleges. We want to develop and embed better systems of support for students so that both current and future cohorts can overcome barriers to accessing Higher Education. Over the next five years we will refine our operations by using a new school/college-based metric to target our work and maximise our impact. This will involve the following stages:

### **Stage 1 (FYs 2020-21 and 2021-22)**

During this stage we will research, develop and implement a new impact metric based on school/college-level progression data to post-18 destinations. We will also evaluate our current programme offering in terms of its effectiveness at delivering systemic change within schools/colleges, using this to refine and extend our programmes where necessary.

### **Stage 2 (FYs 2022-23, 2023-24 and 2024-25)**

During this stage we will seek funding for, and carry out, an evidenced-based scaling up of our programmes. Through this, we aim to deliver systemic change across the schools and colleges serving young people who face the greatest barriers in accessing Higher Education.

# How we manage our affairs

## Trustees

Causeway Education is a charitable company limited by shares, incorporated on 29 September 2014 and registered as a charity in England and Wales on 11 October 2017 and in Scotland on 9 January 2018.

The company was established under a memorandum of association detailing its objects and powers and is governed under its articles of association by a Board of Trustees.

The Board's work includes critical analysis of the strategic plans and agreeing our financial plan. The Board acts on advice and information from regular meetings with the Senior Management Team. They are also responsible for management of the Chief Executive Officer.

All our trustees give their time voluntarily and receive no benefits from the organisation. Any expenses reclaimed from the charity are set out in note 6 to the accounts.

In 2019-20 the Board had five meetings. Each meeting has a set agenda that usually involves, but not limited to, reviewing Charity performance, strategy, policy and the organisations risks and mitigating actions.

### **Appointment of Trustees**

The appointment of trustees is governed by our Articles of Association. Our trustees are also directors of Causeway Education for the purposes of company law.

### **Trustee induction and training**

We make new trustees aware of their legal obligations under charity law and company law. Our induction programme for new trustees includes an overview of our decision-making processes, our strategic aims, and our recent performance. As part of our safer recruitment processes we ensure trustees have an enhanced DBS, provide two references and take online safeguarding training. Trustees are invited to see our programme delivery in action. We involve trustees in specific pieces of work depending on their interests and expertise. They are also invited to specific Trustee related training courses run by external suppliers.

## Trustee decision making

### **Pay policy**

Our trustees are responsible for the annual salary review for staff in the organisation on recommendation of the Senior Management Team, at which pay is normally increased in line with annual inflation (RPI). Trustees review and approve appointment salaries and salary increases for senior staff; appointment salaries and salary increases for junior staff are reviewed and approved by the senior management team. Recruitment panels for senior management must include at least one trustee

A new formal pay policy is due to be implemented in the coming financial year that will look at the pay of individual roles as well as the individuals within the roles to ensure fairness, transparency and stability across the organisation.

### **Trustee responsibilities**

Our trustees are responsible for preparing the trustees' annual report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires our trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- Select suitable accounting policies and then 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 and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements.
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

Our trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable 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 audit information of which the charitable company's auditor is unaware.
- The trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditor is aware of that information.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

Shareholders of the charity will lose their shares in the event of the charity winding up. The total number of such guarantees at 31 March 2020 was 5 (2019: 7). The trustees are shareholders of the charity but this entitles them only to voting rights. The trustees have no beneficial interest in the charity and this is monitored by each board member completing their declarations of interest.

# Compliance information

## Data protection

Our policies and procedures are robust and we meet the General Data Protection Regulation, in effect from May 25 2018. We are registered with the Information Commissioner's Office.

## Fundraising

We comply with all relevant statutory regulations and with a range of codes of practice and standards. We are members of the Institute of Fundraising and are registered with the Fundraising Regulator. We are committed to best practice and to responding to and learning from any complaints we receive; our complaints procedure is published on our website. Our fundraising promise, also published on our website, is to

- Commit to high standards
- Be clear, honest and open
- Be fair and reasonable
- Be accountable & responsible

We do not use volunteers to fundraise, and we do not fundraise from members of the public.

## Whistleblowing policy

Our whistleblowing policy protects anyone who discloses concerns from discrimination.

## Child safeguarding

All staff, volunteers, contractors, and third-party organisations with whom we partner are bound by our Child Safeguarding policy and procedures. All staff, contractors and volunteers are required to complete child safeguarding training as part of their induction. We publish our Child Safeguarding Policy on our website and have a dedicated e-mail address to which concerns can be reported.

## Equal opportunities

We are committed to the principle and practice of equal opportunities in employment, recruitment, and programme delivery.

## Anti-bribery, anti-corruption and anti-fraud policies

Our Anti-Bribery and Anti-Corruption policy and our Anti-Fraud policy and related procedures ensure that we have controls and processes designed to prevent and detect fraud and dishonesty. We investigate any allegations that arise and take appropriate action where needed.

## Independent Examiner

Susan Robinson of Kreston Reeves LLP was appointed as the charitable company's independent examiner during the year and has expressed her willingness to continue in that capacity.



# Financial review

This year, the charity has seen a significant reduction in funding due to several large Uni Connect funded programmes coming to an end. Owing to the way these programmes were funded, the charity in previous years had reported large surpluses leading to the healthy fund position. As these large programmes completed, the associated direct and indirect running costs along with some staff were no longer required. Costs have reduced significantly in line with expected future funding and, as a result, the charity anticipates returning to a surplus in this coming financial year.

**Income** has decreased from £2,207k to £494k, a 78% decrease. Most of the reduction came from the completion of all but one of the Access Champions programmes in July 2019. Access Champions funding reduced from £1,983k to £178k. 64% of this is statutory funding, whilst the remaining 36% is from the Sutton Trust.

Other programmes run by Causeway Education, accounting for 46% of the charity's total income, have grown by 10% to £228k.

**Expenditure** has decreased significantly in line with reduction in the activities of the charity. In total, expenditure has decreased by 50% to £902k, (2019: 1,822k). The most significant decrease comes from the Access Champions programme, which accounted for 78% of the total expenditure in 2019, decreasing this year by 58% to £597k, (2019: £1,422k). Other programmes, accounting for 27% of the total expenditure, have increased to £246k. (2019: £187k).

Due to the reduction in overall activity of the charity, Research & Policy and Fundraising costs have decreased by 80% and 59% respectively. Although these activities still account for 3% and 4% of the total expenditure, respectively. (2019: 7% and 5%).@

## Risks & uncertainties

Our trustees are responsible for ensuring proper risk management processes are in place. A formal risk register has been formulated and agreed, and trustees discuss risks and uncertainties at each trustee meeting.

The trustees consider that the most significant risks facing the charity are:

- **Shortfalls in future funding.** The organisation regularly monitors and reports on the future funding opportunities that the charity has at least a year into the future. Over the past year, the charity has developed a new strategy to consolidate and expand our most secure income streams, as well as developing a number of new projects.
- **Cash flow.** Due to the current economic conditions, the organisation is at risk from sudden cash flow shortfalls in the medium term. The senior management team along with the Trustees regularly monitor cash flow forecasts over 12 months in the future highlighting significant risk that cash will fall below a safe level considerably in advance of it happening, with agreed actions in place should this occur.
- **Information security breach.** With the increasing shift towards online working and service delivery, the security of our IT systems and our online platform (OSCAR) have become even more important. To ensure the organisation has a very high level of protection in

place, we have obtained Cyber Essentials Certification and carried out a comprehensive audit and penetration test of OSCAR (refreshed on a monthly basis).

## Reserves and reserves policy

Reserves have decreased by 63% to £239k, (2018: £647k). The total funds of the charity, excluding the share capital, have been classified as either Unrestricted or Restricted funds.

All unrestricted funds are free reserves to be used at the trustees' discretion to take advantage of opportunities or to mitigate against negative financial impact of unforeseen events. As at the end of the financial year, these stood at £90k, (2019 (£395k).

Restricted funds, which are not available for general purpose, have decreased by 41% to £149k, (2019: 252k). Further details of the restricted funds can be found in note 11.

The charity has no investments or tangible fixed assets.

The reserve policy of the charity is to maintain available funds above a level equal to three months of overheads, with cash flow forecasts being monitored regularly. If within three months the available funds are due to fall below this safe level, an extraordinary meeting of the Trustees is called to decide if any immediate actions are required. Although cash levels as at the reporting date did fall below £150k, it was forecasted to return to a healthy level above £150k soon after the year end which it duly did.

## Going concern

The Charity has £239k in reserve and with plans to turn a small surplus in the coming year and so the trustees believe that Causeway Education has adequate recourses to continue trading into the foreseeable future. The nature of the Causeway Education's work means that it is in a good position to provide valuable programmes and secure the necessary funding during the COVID-19 pandemic. The Trustees are continuing to monitor the pandemic situation closely and the impact on the organisation's future.

The trustees' annual report has been prepared in accordance with the provisions applicable to companies' subject to the small companies' regime.

The trustees' annual report has been approved by the trustees on 6 September 2020 and signed on their behalf by

Andrea Carr

Causeway Education – Chair of Trustees

# Independent examiner's report to the members of Causeway Education

I report to the charity trustees on my examination of the accounts of the company for the year ended 31 March 2020 which are set out on pages 20 to 32.

## **Responsibilities and basis of report**

As the charity trustees of the company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act')

Having satisfied myself that the accounts of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your company's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

## **Independent examiner's statement**

Since the company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities.

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

Signed:

S M Robinson BA FCA FCIE DChA MCMI

**Kreston Reeves LLP**

Chartered Accountants

Chatham Maritime

Date:

# Causeway Education

## Statement of financial activities

For the year ended 31 March 2020

		Unrestricted Funds	Restricted Funds	Total Funds	Unrestricted Funds	Restricted Funds	Total Funds
		2020	2020	2020	2019	2019	2019
Notes		£	£	£	£	£	£
Income from charitable activities:							
Access Champions	3	114,486	63,364	177,850	1,743,268	239,740	1,983,008
Other Programmes	3	67,103	160,415	227,518	54,416	151,994	206,410
Other Income	3	88,247	-	88,247	17,640	-	17,640
Bank Interest Received	3	703	-	703	-	-	-
<b>Total Incoming Resources</b>		<b>270,539</b>	<b>223,779</b>	<b>494,318</b>	<b>1,815,324</b>	<b>391,734</b>	<b>2,207,058</b>
Expenditure from:							
Research & Policy	4	(25,487)	-	(25,487)	(129,156)	-	(129,156)
Access Champions	5	(414,943)	(181,931)	(596,874)	(1,297,435)	(125,284)	(1,422,719)
Other Programmes	5	(108,287)	(137,331)	(245,618)	(49,229)	(137,274)	(186,503)
<b>Total cost of charitable activities</b>		<b>(548,717)</b>	<b>(319,263)</b>	<b>(867,979)</b>	<b>(1,475,820)</b>	<b>(262,558)</b>	<b>(1,738,378)</b>
Raising Funds:							
Fundraising activities	4	(34,173)	-	(34,173)	(83,940)	-	(83,940)
<b>Total Resources Expended</b>		<b>(582,889)</b>	<b>(319,263)</b>	<b>(902,152)</b>	<b>(1,559,760)</b>	<b>(262,558)</b>	<b>(1,822,317)</b>
<b>Net Income for the year</b>	<b>6</b>	<b>(312,350)</b>	<b>(95,484)</b>	<b>(407,833)</b>	<b>255,564</b>	<b>129,176</b>	<b>384,740</b>
Transfers between funds		7,802	(7,802)	-	60,982	(60,982)	-
<b>Net Movement in Funds</b>		<b>(304,548)</b>	<b>(103,286)</b>	<b>(407,833)</b>	<b>316,546</b>	<b>68,194</b>	<b>384,740</b>
Reconciliation of funds:							
Total funds brought forward		395,023	251,828	646,851	78,477	183,634	262,111
<b>Total funds carried forward</b>		<b>90,476</b>	<b>148,542</b>	<b>239,017</b>	<b>395,023</b>	<b>251,828</b>	<b>646,851</b>

# Causeway Education

## Statement of financial position

As at 31 March 2020

	Notes	2020 £	2019 £
<b>Current Assets</b>			
Debtors	8	149,311	159,568
Cash at bank and in hand		134,212	624,068
		<b>283,523</b>	<b>783,636</b>
<b>Creditors: Amounts falling due with one year</b>			
	9	(44,495)	(136,775)
<b>Net Assets</b>			
		<b>239,027</b>	<b>646,861</b>
Unrestricted Funds	11	90,476	395,023
Restricted Funds	12	148,542	251,828
Share Capital	13	10	10
Total Funds		<b>239,027</b>	<b>646,861</b>

Approved by the trustees on 6 September 2020 and signed on their behalf by

Causeway Education – Chair of Trustees

Company Number 09239703

# Causeway Education

## Statement of cash flows

For the year end 31 March 2019

	Notes	2020 £	2019 £
Net cash used in operating activities	14	(490,560)	504,277
Movement in share capital		0	0
Cash flows from financing activities		703	0
Change in cash and cash equivalents		(489,856)	504,277
Cash brought forward		624,068	119,790
Cash carried forward	15	134,211	624,068

# Notes to the accounts

## 1. Accounting policies

These accounts have been prepared in accordance with “Accounting and Reporting by Charities” the Statement of Recommended Practice (SORP) applicable to charities preparing their accounts in accordance with the Financial Reporting standard applicable in the UK and Republic of Ireland (FRS 102), effective 1<sup>st</sup> January 2019. The charity is a Public Benefit Entity as defined by FRS 102.

### 1.1 Going concern

At the time of approving the accounts, the trustees believe that Causeway Education has adequate resources to continue trade into the foreseeable future. These accounts have therefore been prepared on a going concern basis. The trustees have reviewed the accounts, funding and liquidity of the charity, taking into account the impact of the COVID-19 pandemic and agree that there are no material uncertainties that prevent it operating.

### 1.2 Public benefit entity

The charitable company meets the definition of a public benefit entity under FRS 102.

### 1.3 Incoming resources and funds

All income in the accounts is recognised if the charity has entitlement to the funds; it is probable that the income will be received; and the amount can be measured reliably.

Income is assessed as either unrestricted- and can be used at the discretion of the trustees to further the charitable objectives-or restricted-and subject to specific conditions by funders as to how it is used. Expenditure attributable to these resources is charged to the funds.

Income should be recognised in year received or receivables, whichever is earlier, unless funder specifies for future financial period, in which case it is deferred.

### 1.4 Support costs

Support costs are those functions that assist the work of the charity but do not directly influence charitable objectives. These may include but are not limited to finance, office costs, payroll and governance. Agreements with funders mostly have a support cost allocation included and therefore these accounts include this allocation where applicable and charged to the appropriate fund.

Most of the employees of the charity can and have been allocated to the programme that they predominately support.

Remaining support costs are re-allocated to each of charitable activities based on the size of the corresponding activity and as such for 2019 the allocation is as follows:



- Access Champions – 96%
- Other programmes – 4%

### **1.5 Fixed assets**

It is the policy of the charity that any assets purchased over the value of £5,000 will be capitalised.

As at 31 March 2020, there have been no assets purchased over £5,000 and therefore currently the Charity has no fixed assets.

### **1.6 Corporation Tax**

Causeway Education became a charity in October 2017 and as a charity it is exempt from paying corporation tax.

### **1.7 Operating lease**

Rental charges are charged on a straight-line basis over the term of the lease.

### **1.8 Fund accounting**

Restricted funds are to be used for specific purposes as laid down by the donor. Expenditure which meets these criteria is charged to the fund.

Unrestricted funds are donations and other incoming resources received or generated for the charitable purposes.

### **1.9 Expenditure and irrecoverable VAT**

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required, and the amount of the obligation can be measured reliably.

Expenditure is recognised on an accruals basis as a liability incurred, including any VAT which cannot be fully recovered.

Fundraising is the costs of raising funds related to the costs incurred by the charitable company in inducing third parties to make voluntary contributions to it, as well as the cost of any activities with a fundraising purpose.

Expenditure on charitable activities includes the costs of delivering the Access Champions and other programmes undertaken to further the purposes of the charity and their associated support costs.

Research and Policy is the costs associated with evaluation of the work being done by the charity and to influence government policy to further the work of Causeway Education.

Irrecoverable VAT is charged as a cost against the activity for which the expenditure was incurred.

### **1.10 Debtors**

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

### 1.11 Cash at bank and in hand

Cash at bank and cash in hand includes cash and short term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account. Cash is also held by an outside company for the purposes of loading onto prepaid corporate cards to be used by employees for general expenses, these funds are also included.

### 1.12 Creditors

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

A doubtful debt provision has been made on a case by case basis depending upon the likelihood of receipt and age of debt.

## 2 Statutory information and status of the charity

Causeway Education is a registered charity limited by shares and is incorporated in England. Its registered office and principal place of business is NCC Space, New City College, Falkirk Street, London, N1 6HQ.

## 3 Income from charitable activities

	Unrestricted Funds	Restricted Funds	Total Funds	Unrestricted Funds	Restricted Funds	Total Funds
	2020	2020	2020	2019	2019	2019
	£	£	£	£	£	£
The Sutton Trust	40,509	223,779	264,288	13,385	323,731	337,116
Allen & Overy	26,844	-	26,844	19,300	-	19,300
Innovate UK	-	-	-	-	16,783	16,783
NCOP	114,486	-	114,486	1,743,268	-	1,743,268
Scottish Funding Council	-	-	-	-	51,220	51,220
Programmes - Other	76,997	-	76,997	22,331	-	22,331
Other Income	11,000	-	11,000	17,040	-	17,040
Bank Interest	703	-	703	-	-	-
<b>Total</b>	<b>270,539</b>	<b>223,779</b>	<b>494,318</b>	<b>1,815,324</b>	<b>391,734</b>	<b>2,207,058</b>

#### 4 Support and general costs

	Staffing	Other	Total	Staffing	Other	Total
	2020	2020	2020	2019	2019	2019
	£	£	£	£	£	£
Executive, Governance & Finance	(224,077)	(17,174)	<b>(241,251)</b>	(192,025)	(17,242)	(209,267)
IT, Communication & Evaluation	(47,689)	(44,717)	<b>(92,406)</b>	(114,315)	(81,213)	(195,528)
Overheads	-	(33,845)	<b>(33,845)</b>	-	(148,717)	(148,717)
General Programme Costs	(133,642)	(10,448)	<b>(144,090)</b>	(314,560)	(16,686)	(331,246)
<b>Support Total</b>	<b>(405,408)</b>	<b>(106,184)</b>	<b>(511,592)</b>	<b>(620,900)</b>	<b>(263,858)</b>	<b>(884,758)</b>
Research & Policy	(24,317)	(1,169)	<b>(25,487)</b>	(124,374)	(4,782)	(129,156)
Fundraising activities	(34,006)	(167)	<b>(34,173)</b>	(75,196)	(8,743)	(83,940)
<b>Grand Total</b>	<b>(463,731)</b>	<b>(107,520)</b>	<b>(571,252)</b>	<b>(820,470)</b>	<b>(277,383)</b>	<b>(1,097,853)</b>

#### 5 Programme costs

	Staffing	Freelancers	Direct Costs	Support Allocation	Total
	2020	2020	2020	2020	2020
	£	£	£	£	£
<b>Programme</b>					
Access Champions	(87,567)	(65,303)	(48,010)	(395,995)	<b>(596,874)</b>
Academic Apprenticeship	(24,547)	(8,959)	(94)	(5,457)	<b>(39,057)</b>
Pathways to Law	(14,408)	(6,570)	(1,628)	(3,894)	<b>(26,500)</b>
Pathways to Coding	-	-	-	-	-
Teacher Champions	(3,685)	-	(2,385)	(477)	<b>(6,547)</b>
Other Programmes	(36,397)	(24,887)	(6,461)	(105,769)	<b>(173,514)</b>
<b>Total</b>	<b>(166,605)</b>	<b>(105,718)</b>	<b>(58,577)</b>	<b>(511,592)</b>	<b>(842,492)</b>

The Charity received benefit in kind from various institutions estimated at £2,000 (2019: £22,215). The detail of which are: Meeting room space and catering from Allen & Overy (£550), various meeting spaces from the FEA, University of East Anglia and Royal Veterinary College to run workshops (£1,450).

The Trustees would like to thank each of the organisations for their generosity.

**Programme costs (Prior Year)**

	Staffing	Freelancers	Direct Costs	Support Allocation	Total
	2019	2019	2019	2019	2019
<b>Programme</b>	£	£	£	£	£
Access Champions	(148,776)	(374,842)	(64,597)	(834,504)	(1,422,719)
Academic Apprenticeship	(18,971)	(3,765)	(3,530)	(5,736)	(32,002)
Pathways to Law	(18,158)	(11,769)	(1,407)	(6,268)	(37,603)
Pathways to Coding	(6,342)	(1,120)	-	(1,492)	(8,954)
Teacher Champions	-	-	-	-	-
Other Programmes	(39,583)	(12,187)	(19,419)	(36,757)	(107,945)
<b>Total</b>	<b>(231,830)</b>	<b>(403,682)</b>	<b>(88,953)</b>	<b>(884,758)</b>	<b>(1,609,222)</b>

**6 Net income for the year**

	Total 2020	Total 2019
	£	£
Stated after charging:		
Independent Examination Fees	(1,500)	(10,920)
Trustees Expenses	(14)	(1,511)
Operating Lease on property	(49,920)	(96,863)

## 7 Employee information

	Total 2020	Total 2019
Raising Funds	0	1
Charitable Activities	7	11
Support (Including Governance)	4	8
Average Employees	11	20

Staff Costs including directors' remuneration	Total 2020	Total 2019
	£	£
Wages and Salaries	(552,036)	(910,273)
Social Security	(53,941)	(94,500)
Pension	(24,359)	(47,526)
<b>Total</b>	<b>(630,336)</b>	<b>(1,052,299)</b>

The following number of employees received employee benefits (excluding employer pension costs and employer's national insurance) during the year between:	Total 2020	Total 2019
	£	£
£80,000 - £89,999	1	2
£90,000 - £100,000	0	1
<b>Total</b>	<b>1</b>	<b>3</b>

The total employee benefits (including pension contributions and employer's national insurance) of the key management personnel were £261,639. (2019: £567,532).

Included in staff costs are redundancy costs in the year of £27,077. (2019: Nil)

The charity trustees have not received any remuneration.

Trustees' expenses represent the payment or reimbursement of travel and subsistence costs totalling £14 (2019: £1,511) incurred by 8 (2019: 8) members relating to attendance at meetings of the trustees.

**8 Debtors**

	Total 2020	Total 2019
	£	£
Trade Debtors	64,663	44,878
Accrued Income	83,609	114,665
Other Debtors	1,039	25
<b>Total</b>	<b>149,311</b>	<b>159,568</b>

**9 Creditors**

	Total 2020	Total 2019
	£	£
Trade Creditors	(15,996)	(78,119)
Funds Repayable	0	(26,566)
Staff Expenses	0	(369)
Accruals	(28,500)	(31,721)
<b>Total</b>	<b>(44,496)</b>	<b>(136,776)</b>

**10 Analysis of the fund position: unrestricted funds (Current year)**

	Opening Balance	Income	Expenditure	Transfers	Movement in Year	Closing Balance
	£	£	£	£	£	£
General Fund	395,024	270,539	(582,889)	7,802	(304,547)	90,476
<b>Total</b>	<b>395,024</b>	<b>270,539</b>	<b>(582,889)</b>	<b>7,802</b>	<b>(304,547)</b>	<b>90,476</b>

**10b. Analysis of the fund position: unrestricted funds (Prior year)**

	Opening Balance	Income	Expenditure	Transfers	Movement in Year	Closing Balance
	£	£	£	£	£	£
General Fund	78,477	1,815,324	(1,559,759)	60,982	316,547	395,024
<b>Total</b>	<b>78,477</b>	<b>1,815,324</b>	<b>(1,559,759)</b>	<b>60,982</b>	<b>316,547</b>	<b>395,024</b>

**11 Analysis of the funds position: restricted funds (Current year)**

	Opening Balance	Income	Expenditure	Transfers	Movement in Year	Closing Balance
	£	£	£	£	£	£
Academic Apprenticeship	73,164	90,931	(103,384)	-	(12,453)	60,711
Pathways to Coding	12,814	-	-	(12,814)	(12,814)	-
Pathways to Law	51,395	49,484	(26,500)	-	22,984	74,379
Teacher Summer Schools	-	-	-	-	-	-
Access Champions - Sutton Trust	114,455	63,364	(181,931)	4,112	(114,455)	-
Access Champions - Scotland	-	-	-	-	-	-
Teacher Champions - Sutton Trust	-	20,000	(6,547)	-	13,453	13,453
Innovate	-	-	(900)	900	-	-
<b>Total</b>	<b>251,829</b>	<b>223,779</b>	<b>(319,263)</b>	<b>(7,802)</b>	<b>(103,286)</b>	<b>148,543</b>

**11b. Analysis of the funds position: restricted funds (Prior year)**

	Opening Balance	Income	Expenditure	Transfers	Movement in Year	Closing Balance
	£	£	£	£	£	£
Academic Apprenticeship	60,724	78,935	(66,495)	-	12,440	73,164
Pathways to Coding	7,708	14,060	(8,954)	-	5,106	12,814
Pathways to Law	46,782	42,216	(37,603)	-	4,613	51,395
Teacher Summer Schools	68,422	-	-	(68,422)	(68,422)	-
Access Champions - Sutton Trust	-	188,520	(74,064)	-	114,456	114,455
Access Champions - Scotland	-	51,220	(51,219)	-	-	-
Teacher Champions - Sutton Trust	-	-	-	-	-	-
Innovate	-	16,783	(24,223)	7,440	-	-
<b>Total</b>	<b>183,636</b>	<b>391,734</b>	<b>(262,558)</b>	<b>(60,982)</b>	<b>68,194</b>	<b>251,828</b>

## Purpose of Restricted Funds

The purposes of the above funds are to provide monies to run each of the programmes. Each of the programmes have a separate agreement and run past 31 March 2020 into the new financial year and beyond. Further information on the purposes of the programmes can be found in the annual report on page 6.

All the restricted funds are linked to the charitable objectives of the organisation which is improving the life chances of children and young people in the UK by supporting them and their influencers through key educational transitions.

Pathways to Coding programme completed within the year and it was agreed that the remaining surplus can be transferred to the Charity's general fund.

The Access Champions – Sutton Trust restricted fund ran into deficit this year, the remaining part of the project will continue to be funded from the Charity's general fund until completion in July 2020.

Innovate programme required small extra funding from the Charity's general fund. This programme completed in April 2019 and therefore no extra funding will be required.

No other restricted funds ran into deficit to 31 March 2020.

## 12 Pension obligations

The Charity has a defined contribution pension scheme where both the employee and employer pay contributions every month in the employees' pension.

The amount owed to the pension scheme was £3,586, (2019: £12,676). There are 10 employees enrolled on the pension scheme.

## 13 Related party transactions

The Charity has no related party transactions. There are no donations from related parties which are outside the normal course of business and no restricted donations from related parties.

## 14 Reconciliation of net income / (expenditure) to net cash flow from operating activities

	Total 2020	Total 2019
	£	£
Net income / (expenditure) for the reporting period	(407,833)	384,740
Bank Interest (Received)	(703)	0
(Increase)/decrease in debtors	10,257	106,310
Increase/(decrease) in creditors	(92,280)	13,228
<b>Total</b>	<b>(490,560)</b>	<b>504,278</b>



**15 Analysis of cash and cash equivalents**

	Total 2020	Total 2019
	£	£
Cash at bank and in hand	129,757	619,614
Prepaid Cards	4,431	4,431
Petty Cash	24	24
<b>Total</b>	<b>134,212</b>	<b>624,068</b>

**16 Operating lease commitments**

	Property 2020	Property 2019
	£	£
Less than one year	(4,800)	(30,240)
<b>Total</b>	<b>(4,800)</b>	<b>(30,240)</b>

Causeway Education has an operating lease on its office space, the total of which expensed in the year was £49,920. (2019: 96,863). It has no other operating leases as at 31 March 2020.

**17 Taxation**

The charitable company is exempt from corporation tax as all its income is charitable and is applied for charitable purposes.

**18 Share capital**

The Charity is a private company limited by shares. It was incorporated in September 2014 but amended by special resolution passed in June 2017 with shares fully issued to the trustees between July and January 2018.

The original 20 shares were relinquished by the original holders and 10 new shares were issued and distributed amongst the Trustees, with the remaining 10 not being issued by the Charity.