

Charity Health Check for CSIE

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Introduction

The Centre for Studies on Inclusive Education (CSIE) is a national charity, registered in England and Wales and working more widely in Scotland and internationally. It promotes equality and aims to eliminate discrimination in education. It was founded in 1982, and it champions inclusive educational change through producing a range of resources, providing national and international training and consultancy, as well as lobbying and campaigning.

As well as publishing reviews revealing trends amongst local authorities' school placement of pupils across England, CSIE works to promote disability equality in education through a number of activities including training and consulting, running disability awareness workshops for pupils and equality workshops for teachers, conducting curriculum and policy reviews as well as equality audits for schools. CSIE plays an important role in the sector.

CSIE's heyday fell in the early years of the millennium, when its most renowned publication was published, and for which it is still remembered—the Index for Inclusion (2002), an accessible and practical resource for schools to self-evaluate and improve their inclusivity. CSIE is a member of the Special Educational Consortium, operated by the Council for Disabled Children, and some of CSIE's lobbying and campaigning work for disability equality in education happens through that network of over 300 organisations. In the early 2000s, two representatives from CSIE contributed to negotiations of the Ad Hoc Committee responsible for drafting the Article 24 (Education) of the UN Convention on the Rights of Persons with Disabilities.

Over the last decade CSIE has struggled to secure core funding and its activities have been affected. The COVID-19 pandemic further exacerbated existing challenges and as a result CSIE faced serious financial difficulties. Throughout, but particularly during and following the COVID-19 pandemic, its two members of part-time staff, have shown consistent strength, resilience, and dedication to inclusive education during professionally and personally challenging times.

NPC has been commissioned by CSIE to carry out a charity health check of the organisation, giving recommendations on what is going well and where improvements could be made.

Methodology

This charity health check is structured around NPC's "[*What Makes A Good Charity*](#)" framework. The framework, which has been honed over more than 15 years of application, supports analysis around key indicators of charity performance, sustainability, and impact. The framework focuses on four areas: purpose, impact practice, people, and finance and operations. It outlines sector best practice under each of these themes, and how they must work together to maximise a charity's success.

In using the *What Makes a Good Charity Framework* to conduct a health check of CSIE NPC initially undertook desk-based research of CSIE's publicly available information as well as internal documents. This research informed questions for subsequent semi-structured interviews with CSIE staff (the Director and Administrator), the Chair of trustees and two previous funders. Information gathered from the desk-based research and the qualitative interviews was analysed, and NPC provides observations and recommendations to support CSIE in defining their many strengths and discussing potential opportunities for improvement.

Purpose

A good charity is one that has a clear purpose: its vision and mission address a certain need. All charities have a social or environmental purpose and aim to affect positive change in the world, so it is important for a charity to be explicit about the needs it seeks to meet, and how it aims to do so.

CSIE addresses a clear need

In its 2020-21 Annual Report, CSIE states that it works to “promote equality and eliminate discrimination in education for everyone regardless of age, ability, sex, gender identity, sexual orientation, culture/ethnicity, socioeconomic background, religion or belief”. CSIE works through a specific lens focussed on disability equality, whilst recognising that exclusion in education is an issue faced by children with multiple disadvantages, including Black children, Gypsy, Roma and Traveller children, and those eligible for free school meals. A recent analysis by the Department for Education (DfE) recognises that these groups of children, along with disabled pupils, are more likely to be excluded from schools in the UK than White British children.

In England, there are currently over 270,000 school children who have an Education, Health, and Care Plan. Over 40% of these pupils attend maintained special schools, over 1% non-maintained special schools, and just under 1% Pupil Referral Units. Research, carried out by CSIE has outlined that there has been a recent national rise in pupil placements into special schools, and “a tenfold difference in the rates of segregation into special schools of children with Education, Health and Care Plans” (EHCP). [The Equality Act 2010](#) seeks to protect against harassment and discrimination, however CSIE believes that the widespread segregation of school children seems contradictory to the stated commitment to disability equality and is committed to an education system in which this widespread segregation of school children no longer exists.

In the UK over the last 10 years, the number of disabled pupils with EHCPs being educated in mainstream schools has steadily declined¹ and there are repeated reports from mainstream schools of the inability to provide sufficient Special Educational Need (SEN) provisions. Pupils with SEN already account for over 47% of fixed-term exclusions in the UK and so without SEN

¹ [Coronavirus Bill Debate 23 March 2020 - Allfie](#)

provisions in place, there is concern disabled pupils in the UK will see a steeper increase in rates of exclusion and segregation.

Government rhetoric and action on inclusivity are not aligned. For example, inclusivity is only mentioned in the introduction to the government's SEND Code of Practice, and the Children and Families Act 2014 is based on a medical model of disability, which infers that people are disabled by their differences, rather than by societal barriers. Framing current education policy around the medical model of disability, can lead to an increase in segregation. For better inclusion there needs to be a change to the system in favour of a social model of disability that recognises what disables people is not their impairment but society's response.

As the sector awaits the government's SEND Review by the end of Quarter 1 of 2022, CSIE's work has never been more needed. The, much delayed, Review will explore the efficacy of current governmental SEND policy. The response to the Review is likely to open opportunities for greater work to support inclusion in education, and so the need for CSIE's expertise and insight in the sector is likely to increase significantly.

CSIE could better articulate the value it adds, specifically around inclusion of children with disabilities in mainstream education

As systemic inequalities in education in the UK are intrinsically intersectional, it is near impossible to address one aspect of disadvantage in silo and attempting to do so may risk reducing certain experiences of inequality to a homogenous experience. CSIE clearly recognises the complexity of the disadvantages faced by disabled pupils through its broad equality work, but through this its purpose can appear ambiguous.

CSIE's work is extensive and varied. Whilst a holistic view of intersectional issues is valuable, the stated broad focus on inclusivity in all its forms can be confusing when placed alongside a focus on disability. NPC and several stakeholders interviewed share this view. There is room for improving the clarity of communication on CSIE's vision and purpose. Amongst the information available on its website, NPC found the focus on disability equality often lost amid wider issues of inequality.

'CSIE's narrative around inclusive education could be sharper and more defined.'

Anonymous Stakeholder

Recommendations

1. To articulate the purpose of CSIE more clearly, better articulating how it adds value, specifically around inclusion of children with disabilities in mainstream education

Impact practice

For charities, good impact practice shouldn't just be about the achieving the impact they seek to have, it's also about the activities that help drive the impact. A good charity will have clear plans for how they will achieve impact, how they will monitor it, and how they will evaluate their impact in order to define learnings and improvements for their future impact.

The impact of CSIE's interventions in schools appears strong

CSIE has impact through its Disability Awareness Workshops, which can be evidenced through feedback from participating students and staff. The overwhelmingly positive responses note that CSIE's workshops have enabled participants to see disability in a new and positive way, and that the workshops are enlightening.

"It enlightened me to a whole new world of disability. It taught me to be kind and respectful to others who are different"

CSIE workshop participant

"It expanded my knowledge as I have never been taught about this before. It was very helpful".

CSIE workshop participant

Also, CSIE has produced resources for use in schools to support promotion of equality, most recently "Equality: Making it Happen", a toolkit which won an Innovative Practice Award in 2016. It has also been a part of international projects including Improving Assistance in Inclusive Education Settings (IMAS and IMAS II), delivering talks in countries across Europe and also Indonesia.

CSIE's intention to focus on three local authority areas is likely to support greater impact

Limited capacity has meant that CSIE has spread itself thin and wide, making impact more challenging to achieve. Over the next few years, CSIE will partner with three local authorities where it will work closely with schools across those areas and contribute to their learning and development of inclusive education. This plan to focus on three local authority areas offers a promising route to maximising impact. By focussing its work, CSIE will be able build and reinforce a knowledge base in the local authorities and schools of three defined geographical areas. This

provides the opportunity to carry out in-depth, more concentrated work, rather than more light-touch, surface level work. Through delivering workshops in the three local authority areas, it will identify three schools with which it can do intensive work. CSIE reports that experience shows word-of-mouth is integral to generating recognition and interest for its work, and when concentrated within a local authority this can be to a greater extent, increasing its opportunity to make further connections and see wider impact.

CSIE's intention to focus on three local authority areas is realistic and appropriate for its capacity, and so is more likely to allow it to affect change through more direct impact.

Historically CSIE has published impactful resources, and with sufficient resource has the potential to do so again

CSIE makes an impact through raising awareness and building relationships. Its publications and resources are known internationally and have proved to be very important learning materials in the sector. Of recent years CSIE's lack of core funding has seen it focus on income generation to the detriment of such work. There is the potential to increase impact through published resources, and support future business development, with sufficient resource to harness the expertise of the organisation and make it more widely available. The focussed work in three local authorities will be rich in such learning to share more widely.

CSIE has a key role to play in campaigns and lobbying, in partnership with the Special Educational Consortium as appropriate

Historically CSIE's action for change has included lobbying and campaigning work, such as contributions to national and international inquiries and public responses to government initiatives. This includes responses to DfE consultations on Initial Teacher Training in 2021 and on the Schools Admission Code in 2020, Ofsted consultations on their proposed inspection framework in 2019, and the Education Committee's SEND Inquiry in 2018. Currently, CSIE's limited capacity restricts this strand of work to no more than one public response a year. Promisingly, CSIE's new business plan proposes increased time for campaigning and lobbying work, assisted by the recruitment of two new Equality Officers. This will help to create time and space to focus on policy influencing work. Through future unrestricted support from funders or philanthropists, CSIE could be empowered to use its operational learning to inform campaigning and lobbying work that shares innovation and challenges identified at school and local authority level—ultimately keeping it at the cutting edge of change in the inclusive education sector. Whilst a range of equality and disability organisations, many through the Special Educational Consortium, NPC is not aware of an organisation comparable to CSIE with dedicated focus on inclusive education for children living with disabilities.

CSIE’s theory of change would be a more powerful tool for prioritisation, monitoring and learning with more work done to articulate the steps between activities and intended impact.

CSIE’s recently developed Theory of Change (ToC) is a positive first step, however it is currently too high-level to yield the myriad of benefits brought by a strong ToC—including clarity on what to monitor to identify whether intended outcomes and impact are being achieved. At present, limited capacity and lack of clarity on what to collect, restricts CSIE’s ability to routinely monitor its outcomes and impact.

A strong ToC would also help CSIE to increase clarity on its focus and the scope of its purpose, in other words what it does and how it affects change in the world. A fully developed ToC should also provide CSIE with a powerful framework to better articulate what it is aiming to achieve, how that change will be brought about and the added value that only CSIE can bring. It should include the chains of the short-term activities that lead to the long-term change it wishes to see, and who it aims to reach (eg, policy makers, local authorities, decision-makers in schools and the education system). A coherent ToC will enable CSIE to demonstrate confidence and clarity in its purpose and ability to continuously improve its impact.

Recommendations

2. To build on the Theory of Change work that has been done to date to articulate in more detail the steps that lead from activity to intended impact; ideally co-designed with input from all staff members and the board of trustees to maximise the opportunities for strategic discussion on the ways in which CSIE creates the greatest impact

People

People are integral to the impact a charity can have on the world. For a good charity, its team will be soundly supported by strong leadership, stable governance, and reliable and consistent management, allowing it opportunity to maximise its impact.

CSIE have a passionate and committed staff team working under severe capacity restrictions

Even though CSIE has a small staff team, it is clear that it by no means lacks resilience and individual strength and determination. NPC's health check indicates that the primary barrier faced by the organisation is one of capacity (driven by the challenges of securing core funding). The survival of CSIE throughout the pandemic with its limited capacity is a testament to the commitment and dedication of the two members of staff. Each person we spoke with to conduct this piece of work spoke passionately and genuinely about the incredibly hard-working nature of Artemi and Sarah.

Promisingly, in their recent business plan, there are plans for a new organisational structure which will include two new Equality Officers. Increasing CSIE's capacity in this way will allow the organisation to take on more income-generating work. Two extra members of staff will also provide more opportunity and resource for CSIE to continue to reassert its publications, lobbying and campaigning work. CSIE's current organisational structure is not sustainable. Whilst the leadership is undeniably strong, the workload and pressure for the current capacity is unrealistic and potentially at risk of harming the mental health and wellbeing of staff. Increased organisational capacity is essential to bring CSIE out of their current financial struggles, and cycle of continuously seeking short-term funding to survive.

CSIE's staff and trustees have a strong background in inclusive education and equality advocacy, but have limited senior expertise in financial management and fundraising

CSIE is under overall direction and control of its Council of Trustees. Since its establishment 40 years ago, it has never had more than three employees at once, making the role of the trustees all the more critical to the organisation's strength. The Council of Trustees is chaired by Stuart Burgess, a previously trained teacher and university professor with an extensive background in the charity sector; Sue Sanders (secretary) who has a background in inclusive education, with particular focus on LGBTQ+ equality; Brigid Jackson-Dooley (safeguarding), a retired primary

school head teacher and school inspector; Mark Jennett (risk committee chair) with a background in equality, diversity, relationships education, mental health and anti-bullying and Jo Palmer Tweed who also has a background in education. We heard from interviewees that the relationship between trustees and staff at CSIE is positive, with quarterly meetings taking place alongside fortnightly meetings between the director and the chair of trustees: this has been enormously supportive and helpful during the pandemic.

The Council does not include trustees with specific skills focussed on finance or fundraising. Both of which are key areas for the organisation at this time.

CSIE's limited capacity of staff members puts unsustainable pressure on its team, and limits their ability to think strategically

Whilst CSIE's Director is a strong and committed leader, financial and operational pressures means that her time to focus on the strategic aspects of her role is limited. She is bound to an unsustainable level of operational activity. Having been the primary decision-maker as well as primary deliverer of services since the start of her role at CSIE, she faces excessive pressure. For a small organisation, over reliance on a single individual presents significant challenge and strain. Too much pressure on one individual will ultimately become unsustainable and will also limit the diversity of the charity's skills pool. In CSIE's case, NPC believe the staff team is currently lacking in support around development and implementation of its financial strategy and associated business model. NPC sees CSIE's future plans to enrol two new Equity Officers as a positive step to diversifying the team that, as above, can be further enriched by expanding the board of trustees. Recruiting two new staff members will increase capacity and likely enable its Director the resource required to delegate more operational work, so that she can direct her focus more fully to strategic leadership of the organisation. The Director's ongoing operational responsibilities as lead for one of the three local authority areas will need to be managed carefully to ensure that this does not prevent wider strategic objectives being met.

Recommendations

3. Conduct a skills audit of trustees to inform expansion of the Council and increase senior level expertise by recruiting a treasurer and a fundraising specialist to the Council of Trustees
4. Expand the staff team as planned and monitor closely the Director's responsibilities as lead for one of the three local authority areas to ensure that delivery responsibilities do not distract from strategic leadership.

Finance and operations

Financial stability for small charities can often be a real challenge: with limited unrestricted funding, it can be difficult for charities to achieve a sustainable financial position. Ideally, a charity with solid financial foundations will have built up reserves, have access to core, unrestricted funding and a variety of income generating activities, in order for it to focus on its mission and purpose.

CSIE's new business model, to reach financial sustainability through service delivery, is a logical route forward

Long-term funding has been an on-going challenge for CSIE. Reliance on short-term grants can have a real impact on a charity the size of CSIE as with such volatile income, planning can be extremely difficult. CSIE has seen significant drops in income over the pandemic as prior one-year grants from 2019 weren't replaced. Not only can it be harder for smaller charities to secure core funding, but organisations with a more niche diversity, equity, and inclusion (DEI) focus, often struggle further. Due to the difficulties around generating unrestricted funds, CSIE has struggled financially. As a result of this, CSIE was especially vulnerable to the impact of COVID-19. The effect on CSIE's finances has been severe, as it exacerbated existing challenges and without a secure safety net, the organisation came close to closing last year. However, it has managed to keep on its feet: sporadic, small donations have kept things ticking over on a short-term basis. This is not sustainable, which CSIE recognises, and the new business plan seeks to remedy.

CSIE's recently developed business plan outlines aspirational financial targets for the coming years. As previously mentioned, CSIE plans to develop a new programme of activities, for delivery in three defined local authority areas. As long-term unrestricted funding from a grant-maker is highly challenging to secure, CSIE plans to obtain long-term unrestricted income through service delivery in the local authority areas that is pump-primed by an initial set up grant. NPC sees the plan to concentrate CSIE's service delivery across three areas as a logical approach. The model allows for ~50% of staff time to be dedicated to income delivery to finance the organisation's core costs in year 2 (a pattern that will roll forward year-on-year), whilst allowing ~50% of time for other critical activity such as lobbying, campaigning, publication of learning or additional income generating activities as appropriate. For example, Equality Audit consultancy is increasingly being sought from CSIE by schools, and the organisation needs to rebuild its relationships with policy makers where personal changes have effected its networks during the pandemic. Similarly, there will be rich opportunities from the focussed work in three local authorities share learning that has

the potential to benefit the sector with similar impact to the well regarded *Index to Inclusion* publication. The proposed business model provides capacity for this range of ways to create impact.

One potential risk to the business plan is that the lead time to set-up the new business model, for example recruiting and inducting new staff, may take longer than anticipated. However, CSIE have mitigated this risk by pitching the salary level of the new Equality Officer positions equivalent to the grade of an experienced teacher and therefore there is reason to expect that recruitment should be swift and the post holders will 'hit the ground running'.

With half of the first year funding pump-priming all of CSIE's income generating work, and the other half for operational requirements to ensure the success of the business plan, there ideally will be a domino-effect as CSIE strengthens its financial position alongside strengthening itself position as an influential organisation in the inclusive education space. Clearly communicating the vision for impact alongside the vision for financial sustainability paints a powerful case for support.

CSIE's income needs to be diversified and reserves built to increase the likelihood of its long-term sustainability

No income-generating plan is entirely guaranteed; therefore, it is important for charities like CSIE to have access to a diversity of funding streams. CSIE's current capacity limits its ability to diversify its income in many ways, and whilst the new business model makes sense and gives greater capacity for CSIE to seek additional project grants and unrestricted funding. Further grant funding will diversify funding streams, increasing financial sustainability, and enabling specific projects to maximise opportunities to, for example, publish learning and lobby for change.

In addition, CSIE should increase its free reserves. Whilst it has some reserves, most of it is tied up in publication stocks and so inaccessible unless those resources are sold (which is increasingly unlikely as the publications get older). NPC sees CSIE's current reserves policy, reviewed by Trustees in March 2021, as adequate. The launch of the new business model is a timely moment to review the reserves policy to ensure it is appropriate for the new ways of working, and then to commit to ensuring sufficient free reserves are built. Free reserves are important for a wide range of instances including dealing with unexpected income loss (e.g., during the pandemic) and in case of unbudgeted costs arising such as staff illness or parental leave.

Recommendations

5. Diversify income through pursuing the proposed service delivery model as well as continuing to pursue grant funding and developing cutting edge resources for publication.

6. Review the reserves policy and ensure that the agreed reserve level is met
7. Invest in rebuilding networks and relationships with key policy makers, eg Ofsted

Conclusion

CSIE addresses a clear need in addressing inequality within education. Whilst it has had considerable impact on the sector since its creation 40 years ago, in recent years it has struggled due to its limited capacity, lack of long-term unrestricted funding and the recent impact of the pandemic. CSIE's proposed new business model provides an exciting opportunity to strengthen the organisation's finances whilst simultaneously increasing its capacity to continue to create impact for disabled children within the education system.

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Impact	2. To build on the Theory of Change work that has been done to date to articulate in more detail the steps that lead from activity to intended impact; ideally co-designed with input from all staff members and the board of trustees to maximise the opportunities for strategic discussion on the ways in which CSIE creates the greatest impact
People	3. Conduct a skills audit of trustees to inform expansion of the Council and increase senior level expertise by recruiting a treasurer and a fundraising specialist to the Council of Trustees 4. Expand the staff team as planned and monitor closely the Director's responsibilities as lead for one of the three local authority areas to ensure that delivery responsibilities do not distract from strategic leadership.
Finance and Operation	5. Diversify income through pursuing the proposed service delivery model as well as continuing to pursue grant funding and developing cutting edge resources for publication. 6. Review the reserves policy and ensure that the agreed reserve level is met 7. Invest in rebuilding networks and relationships with key policy makers, eg Ofsted