THE OGDEN TRUST

England & Wales · Charity number 1037570

Details

Other names	OGDEN CHARITABLE TRUST
Status	Registered
Legal form	Trust
Registered	1994-05-16
Register	View on the Charity Commission register

Contact

Address	The Ogden Trust 1 EdCity Edcity Walk London
Phone	0208 634 7470
Email	office@ogdentrust.com
Website	ogdentrust.com

Activities

Objects: THE OBJECTS OF THE CHARITY ARE, FOR THE PUBLIC BENEFIT, TO ADVANCE SUCH CHARITABLE PURPOSES (ACCORDING TO THE LAW OF ENGLAND AND WALES) AS THE TRUSTEES DECIDE FROM TIME TO TIME IN PARTICULAR BUT NOT LIMITED TO: (I) THE ADVANCEMENT OF EDUCATION; (II) THE ADVANCEMENT OF SCIENCE; AND (III) THE PREVENTION OR RELIEF OF POVERTY AND THE RELIEF OF THOSE IN NEED, BY REASON OF YOUTH, AGE, ILL-HEALTH, DISABILITY, FINANCIAL HARDSHIP OR OTHER DISADVANTAGE

Activities: The main objectives of the charity are to increase the uptake of physics post-16, particularly for under-represented groups, by supporting the teaching of physics, and supporting students to develop physics identity.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Provides Services, Provides Advocacy/advice/information
- **What:** Education/training
- **Who:** Children/young People

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Geography

- Throughout England

Finances

Period end	Income	Expenditure	Assets	Employees
2025-08-31	£1,162,053	£4,171,867	£75,113,891	21
2024-08-31	£786,716	£3,767,868	£72,402,757	21
2023-08-31	£796,428	£3,266,970	£64,371,981	16
2022-08-31	£600,226	£2,345,272	£65,301,449	11
2021-08-31	£503,328	£2,336,219	£59,480,095	8

Trustees

Name	Role	Appointed
CAMERON OGDEN	Chair	
EDWARD PETER JAMES OGDEN		
LADY OGDEN		
SIR PETER JAMES OGDEN		
TIFFANY CATHERINE ROSE CHAWNER		
Timothy Simmons		2017-07-31

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THE OGDEN TRUST

England & Wales - Charity number 1037570

Accounts

The Ogden Trust

making physics matter

Trustees' report and financial statements

for the year ended 31 August 2025

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Front cover photograph: Physics at Kensington Aldridge Academy, London. Photos taken during a Teach Physics placement in 2025 (photographer: Joshua Sokoya)

Back cover photograph: A Subject Knowledge for Physics Teaching session being delivered in York by Chris Cannon (photographer: John Sanders)

Welcome from Chair and Chief Executive

This past year we have been finalising our new strategy for 2026–2031. It has been an intense period of consultation and consideration as we have re-evaluated our vision, mission and objectives. Physics remains at the heart of the Trust, and we have looked closely at how we can deliver effective programmes and professional development.

The Trust has grown significantly during this current strategic period, and we must ensure that we are spending money efficiently and effectively so we can have the greatest impact. We want to make a meaningful and sustained difference to physics, delivering programmes that work for schools and teachers in a challenging education sector.

Against this backdrop of strategic development, we have continued to invest in the delivery of our current programmes to ensure we are influencing positive change on classroom practice and are best supporting the schools and teachers we work with already.

As we begin a year of transition and prepare to pilot and launch new approaches, we will be building on the legacy and learning from our existing programmes.

We are excited for the year ahead as we start to bring our planning into practice and look forward to delivering new purposeful, powerful and practical support for the teaching and learning of physics.

Cameron Ogden
Chair of Trustees

Clare Harvey
Chief Executive

Our strategy

The Trust's strategy for 2021–26 has focused on enhancing the teaching and learning of physics, and consolidates our commitment to challenging stereotypes, expanding access and opportunities, and making physics matter to more people – especially those in areas that are most in need.

These core ambitions remain at the centre of our work, with our new strategy reframing our mission to strengthen physics education (4–18). Finalised over the past year, the strategy was officially launched in September 2025 – it articulates the core objectives and audiences for our next strategic period (2026–2031).

Beneath the strategic headlines, we have been re-evaluating our programmes and approaches and have started preparing for the transition to our new strategy in 2026. This year, the team structure has been realigned to best support our strategic objectives and priority audiences. We have strengthened our programme management capacity, supporting the team to evolve and progress as they lead and implement new programmes.

An improved cross-team culture of collaboration and communication is being enabled as our new programmes and provision are developed (and delivered); expert, external advisory panels meet regularly to guide progress. As we begin a year of transition to the new strategy we will be piloting and launching new approaches. Some programmes will be ending and others will be transforming as we refocus funding where it can make the most impact; throughout this process of change, we will be building on the legacy and learning from our existing programmes.

Teaching and learning

Our new strategy[i] has been built around a commitment to high-quality physics education, which is a key driver for improving educational outcomes, particularly for pupils from areas of disadvantage. Excellent classroom teaching for all is at the core of our strategy, and our Teaching and Learning team provides a connecting thread across each of our programme areas, developing the professional learning provision to support schools and teachers so they can best deliver high-quality physics education.

Building confidence through subject knowledge professional development.

> We have been struck by the synergy between the values of our organisations – both working in evidence-informed ways to address educational disadvantage. High-quality inclusive teaching is the biggest lever for change. Making sure an effective teacher is in front of every class, and that every teacher is supported to keep improving, is especially important for socioeconomically disadvantaged pupils.
>
> **Kate Horton, Regional Delivery Lead Education Endowment Foundation**

Excellent classroom teaching is core to the provision of high-quality education and is a key driver for improving educational outcomes, particularly for pupils from areas of disadvantage. This framework highlights how senior leadership at primary and secondary can enable physics to thrive within and beyond the classroom.

School leadership teams enable:

- Recruitment and retention of physics teachers
- Professional development for teachers of physics
- Well-resourced practical physics
- Time for curriculum development
- A positive culture for physics
- A whole school approach to equity and inclusion

Excellent classroom teaching for all

Beyond the classroom

- Support for careers and future pathways from physics
- Sustained, impactful enrichment opportunities for all pupils
- Opportunities for families and carers to engage with physics

Time for review, reflection and improvement

This year, the Teaching and Learning team has been leading on our Working Through Others project with the Education Endowment Foundation (EEF). The project has been looking at the design of professional development programmes that support improved physics teaching, with a view to improving teaching and learning for those facing barriers in physics.

Our work with the EEF has been fundamental in shaping our new programmes and provision. Building on our own principles of practice, we have sharpened our focus on implementation and reinforced our processes and delivery to ensure they are securely underpinned by the EEF professional development mechanisms and their guide to implementation.

Making physics matter.

Our partnership with the EEF has also informed how we work with our consultants. This year we made a significant investment in capability building to ensure that our mentors, trainers and regional representatives are best placed to deliver our programmes.

Public benefit

The Trustees have assessed the disclosures made in the Trustees' report and consider that these sufficiently detail the significant activities undertaken in order to carry out the charity's aims for the public benefit. When planning the charity's activities, the Trustees have given regard to the Charity Commission's guidance on public benefit. The Trust's programmes in physics education are beneficial as they are for the advancement of science and education. Most of the programmes are open application and are available to many schools and teachers in England, meeting the criteria that they must benefit a sufficient section of the public.

Priority actions

New evidence-informed programmes will be launched and piloted over the coming year as we prepare for our new strategic period; we will reshape our team of consultants to ensure we can effectively develop and implement our provision.

Following the successful completion of the EEF project we will continue to draw upon expert coaching from Durrington Research School, with sessions delivered for our leadership team and programme managers.

Our achievements: 2024–25

1,460
schools in 137 partnerships

239,254
participants in 956 partnership events

Science Talk
202
early years practitioners from 157 schools

Find the Physics
176
teachers from 125 schools

Phizzi Forces
1,192
teachers from 919 schools

KS3 Improving Physics
234
teachers from 95 schools

Early career support
170
teachers

842
SKPT module completions

51
Coastal Energy interns at 37 companies

57
Teach Physics interns at 40 schools

£138,440
awarded in physics education grants

Teacher support

We want to support teachers (and prospective teachers) so they feel secure in their physics knowledge and valued in their role – whether they are starting their teaching journey, find themselves teaching physics when it is not their specialism or are long-standing physics teachers with years of classroom experience. Our support for teachers includes a range of funded face-to-face and online professional development programmes and opportunities, and a collection of free online resources to support the delivery of classroom physics.

Teaching internships

Teach Physics internships are available to physics and physics-related undergraduate students. The placements provide a teaching-like experience with the aim of influencing aspirations towards physics teaching. Fifty-seven (36: 2024) Teach Physics interns completed placements at 40 (31: 2024) schools in summer 2025. Every intern said they would recommend the programme, and more than 90 per cent of participants reported an increase in their confidence, knowledge, communication, planning, and resource development. Sixteen per cent of participants had already committed to initial teaching training or were signing up after graduation, 77 per cent said they were now more likely to enter teacher training either on graduation or in the future.

Pre-teacher support

For those already on their teaching journey, preparing to start their training or preparing for the classroom, the **Subject Knowledge Foundations** (SKF) webinar series builds confidence and knowledge. In 2024–25, 54 people signed up to this programme with almost half (46 per cent) attending all six sessions. Ninety-two per cent of participants reported that confidence in their subject knowledge had increased and 99 per cent said that their knowledge of common student difficulties had increased; similarly, 98 per cent reported a positive shift in their awareness of issues that physics teachers need to consider in lessons and 89 per cent said they now felt more confident about teaching physics.

> This course has completely inspired me and shown me how many incredible teachers there are and how passionate people are about teaching. I'm so excited to put all of this into action and spread a love of science and learning...
>
> **Subject Knowledge Foundations**

> The Teach Physics internship was an invaluable and immensely rewarding experience. Through observing the unique pedagogies employed by teachers across different classes, as well as assisting and connecting with brilliant young students, I have come out of the internship with a matured view of how to become an effective teacher – one that seeks to not only convey knowledge, but also to inspire passion and contribute to students' personal development.
>
> **Owen, Teach Physics intern, 2025**

Support for initial teacher training

Seventy-nine people from our 2023–24 SKF programme signed up for a new webinar series covering the **Underpinning Principles for Teaching Physics**. Comprising six sessions, 37 people attended between one and three sessions and 14 attended four to six of the sessions. Those that engaged with the programme provided excellent feedback on both the content and the facilitator.

We have continued our partnership this year with the Institute of Physics (IOP), delivering mentoring and support to the **IOP scholars** – trainee physics teachers who have been awarded funding having shown that they are passionate about physics and have the potential to become outstanding teachers.

One hundred and twenty-three scholars began the programme at the start of the 2024–25 academic year and 84 attended the launch event which took place at the National Space Centre in October 2024. At the launch day, the scholars were guided by expert practitioners and introduced to their Ogden mentors – they reflected on the realities of becoming an outstanding physics teacher, explored how to ensure practical demonstrations make a meaningful difference to learning, and considered some of the physics misconceptions they might have to tackle in the classroom.

Scholars were also introduced to the notion of the physics teachers' toolkit which demonstrated how some basic everyday resources can be easily used to illustrate fundamental physics concepts. At the end of the year, evaluation revealed that nearly 60 per cent (58 per cent) had found the toolkit useful or very useful; 68 per cent gave examples of how elements from their mentoring had been incorporated into their planning, providing practical ideas for specific physics lessons.

Maintaining engagement with the mentoring sessions continues to be a challenge. Fifty-nine per cent of the scholars actively engaged – attending two or more sessions; some of those who did not attend sessions reported that they have found the associated programme resources to be useful. Additionally, 105 scholars from 2023–24 continued the programme in their first year of teaching (85 per cent of the original cohort). Thirty-two per cent of these scholars actively engaged in the programme; however, more than half did not attend any of the sessions offered to them.

IOP Scholars Launch event, October 2024.

Early career support

Engagement in the **Teaching Core Physics** online mentoring programme is similarly challenging, with competing priorities in busy school environments making it difficult for new teachers to attend even if the requirement for support is there. Eighty-five teachers in their first or second year of teaching were accepted onto the programme, which is part of our early career provision, and 57 engaged with the sessions available. Across the six programme sessions, attendance averaged about 50 per cent. Feedback from those who did engage was overwhelmingly positive with more than 90 per cent saying they felt more confident that their subject knowledge enabled them to plan and teach physics well.

Eighty-five teachers were also accepted onto our **Developing Physics Specialism**

programme. This programme offers more bespoke mentoring for teachers and nearly three-quarters of those who signed up for this programme demonstrated a medium to high level of engagement: 27 per cent attended between two and four sessions, and 46 per cent went to five or more.

Overall, the early career programme has a positive impact on confidence, subject knowledge, and classroom strategies for early career teachers; a strong sense of community and peer support was reported in this year's feedback.

We continue to deliver the Primary Science Enhancement Award to a small cohort of early career primary teachers each year with seven completing the programme in 2024–25. The award was developed by the Primary Science Teaching Trust for student teachers to increase their experience and understanding of teaching and learning in primary science, but the Trust offers it to help early career teachers to consolidate and build on their science leadership potential.

During an impact study[ii] in 2025, the headteacher at Harrogate Grammar School (Red Kite Alliance) identified the structured mentoring provided by the early career programme as being particularly valuable. Early career teachers working with Ogden mentors mention better classroom management in physics, greater comfort guiding students through misconceptions, and stronger assessment practices.

This increased satisfaction in the classroom appears to be feeding through into teacher retention. At Harrogate they have had no early-career science teacher leave in the past 18 months (as of September 2025). The headteacher states that many cite Ogden involvement as a factor in their decision to stay.

> As a physics teacher, I've found the one-to-one mentoring particularly valuable. It has given me tailored support and practical strategies that directly improved my teaching. The programme also helped me reflect on my classroom practice and grow in confidence.
>
> **Developing Physics Specialism**

Sixty-five teachers attended our Early Career Festival. Across the two-day programme experienced practitioners and mentors provided practical, easy to implement ideas and equipped the new teachers with techniques and resources for confidently delivering engaging physics lessons.

"I loved the early careers festival in August. It filled me with physics enthusiasm for the year ahead and it is helpful to meet and talk to other physics teachers at a similar stage in their career."

> ...having space to reflect has strengthened not just my science teaching, but my overall practice. I've learned how small changes – like more purposeful talk, enquiry activities and inclusive tasks – can make a big impact. This award has helped me grow as a reflective practitioner and I'm excited to keep building on everything I've learned.
>
> **Primary Science Enhancement Award**

Subject knowledge provision

In partnership with STEM Learning, the Trust is continuing to deliver Subject Knowledge for Physics Teaching (SKPT) CPD, which is funded by the Department for Education. A contract extension in 2025 confirmed our provision until April 2026, with increased targets for completion. Following the contract extension and the programme expansion, SKPT school subsidies – available on completion of a module – were increased to (up to) £600 per module. Following this increase, we achieved 505 completions in the summer term alone, bringing our 2024–25 completion numbers to 842 modules. Our SKPT residentials have remained popular (delivering 186 module completions) and we have been able to run several bespoke sessions for whole school science departments and academy trusts.

SKPT: 99 per cent of participants report greater subject knowledge, confidence and motivation six weeks after their course.[iii]

This year, the Trust delivered six primary and seven secondary webinars. In total, 133 teachers attended and actively engaged with these sessions.

> SKPT has equipped me with theoretical knowledge and with new pedagogical strategies that I can directly apply in the classroom. The training has boosted my confidence in teaching physics, and I have seen an improvement in my students' engagement and participation. I have started to use modelling with PhET as well as introducing more real-life examples into my teaching that students can relate to. My pupils are more engaged, participating more and displaying better understanding. I am monitoring changes in results, and I am hopeful that the increased engagement and participation will have a positive impact.
>
> **Sibonokuhle Ncube**
> **Science Teacher, Langley Park School for Girls**

Professional learning development for experienced teachers

The **Senior Teacher Fellowship** programme promotes professional autonomy, skill development and a sense of community, with the intention of encouraging experienced teachers to remain in the profession. Teachers plan and implement a physics education project; they are offered guidance and mentoring throughout their fellowship and become part of a supportive community of practice. Six new teacher fellowship awards were made for 2024–25, with four additional fellowship projects continuing into their second year.

Collectively, STF projects this year have reached more than 5,000 students and 150 teachers. Around 1,200 students and 100 staff members took part directly through classroom teaching, workshops, mentoring, or research activities. Thousands more benefitted indirectly via shared digital resources, professional development, and wider dissemination.

> The project has deepened my understanding of how students learn physics – especially the role of misconceptions and how they persist. I've gained a much clearer perspective on how to design and use diagnostic questions to probe student thinking and inform my teaching. This has made my classroom practice more focused, reflective, and responsive. I've also developed the ability to support students in becoming more metacognitive, helping them to identify and challenge their own misconceptions – particularly during one-to-one progress reviews and reflective exam practice.
>
> **Science Teacher Fellow**

This year, experienced teachers of physics were invited to attend a range of professional development visits, which provided access to leading physics facilities and offered practical approaches to translate cutting-edge physics into meaningful classroom practice.

Twelve secondary school teachers went on a fully funded trip to CERN: more than 90 per cent said they had learned new effective strategies for teaching particle physics in the classroom (91 per cent), with more than 80 per cent (82 per cent) saying that they felt inspired to make changes to their teaching practice.

A further eleven teachers visited the STFC Boulby underground laboratory learning about the latest research, including the search for dark matter and renewable energy storage studies. These teachers headed back to school with new resources and ideas that could be used directly in the classroom: 87.5 per cent of participants felt the trip had improved their subject knowledge, increased their confidence in applying new ideas in the classroom, provided inspiration, and strengthened their sense of belonging to a community of physics educators.

> I can now draw on first-hand experience when teaching complex ideas such as neutrinos, weak interactions and shielding. Standing far underground, surrounded by pioneering research, reminded me why I fell in love with physics in the first place. That renewed excitement will undoubtedly find its way into my classroom – encouraging students to explore real-world applications and inspiring them to ask bigger, more ambitious questions.
>
> **Charlotte Thompson**
> **Lead Practitioner in Science,**
> **King James I Academy**

We also partnered again with the UK Atomic Energy Authority (UKAEA) on their annual Fusion Conference, which this year reached more 50 teachers. The conference offered an inspiring insight into the real-life appliance of science as well as offering practical strategies to share ground-breaking physics with students.

> … such a thought-provoking and energising event. It's been an absolute privilege to be surrounded by so many passionate physics teachers, all gathered to explore the cutting edge of science and energy innovation. Teachers: if you're looking for real world examples of physics in action – this is where the future lives.
>
> **Apayappirathapan Naganathan**
> **Head of Physics, Bishop Justus Church of England School**

Resources

A range of free primary and secondary resources are available online for physics teaching and learning, as well as guides to encourage and develop extra-curricular physics activities. These resources have been downloaded more than 10,000 times over the past 12 months (September 2024–August 2025). Collectively, our working scientifically series remains the most popular (with more than 1,700 downloads), but individually our Purposeful practical: solar system in my pocket has been downloaded more than 640 times.

Priority actions

As part of the new strategy, we will increase the wrap-around care for Teach Physics interns (and others interested in physics teaching) supporting their journey into training, preparing them for the classroom and supporting them in their early career.

2025–26 will be the final year of our teaching core physics programme – we will refocus on growing our support for physics teachers in their first three years of teaching.

We will continue to build our subject knowledge provision, with professional development opportunities for improving primary and secondary physics (including A-level).

Our final cohort of teacher fellows will begin in September 2025. We will curate and fund alternative development opportunities for experienced teachers of physics.

We will review and revise our online resource provision, adding new curriculum and enrichment materials, alongside asynchronous videos and webinars to support effective implementation and purposeful practice.

Subject Knowledge for Physics Teaching.

School partnerships

The Ogden School Partnerships programme supports teachers in schools from Early Years Foundation Stage (EYFS) through to the end of secondary education, working across the phases and addressing the transitions at each key stage. The overarching vision and ambition of the programme is to create sustainable improvement in physics education, making it more accessible and engaging the next generation. Partnerships receive four years of funding with a further year of transition support to foster sustained partnership activity.

The partnership programme works with groups of local schools and with established networks through multi-academy trusts and federations. Our Tameside regional partnership reached the end of its funding in 2025 and the learning for this approach will inform our continued work with schools.

In 2024–25, 137 partnerships were receiving funding and support, comprising 100 local clusters and 37 established collaborations. In total, 1,460 schools were involved in these partnerships – 1,085 primary, 346 secondary and 29 all-through provision. In its final funded year, the place-based project in Tameside supported 65 schools (52 primary, 11 secondary and two sixth form settings), meaning that nearly 70 per cent of schools in the Tameside Local Authority region were actively involved.

Thirty-one new partnerships started in September 2024. We saw a further 10 per cent increase in the number of schools joining the partnership programme with at or above national free school meal percentages and 70 per cent of our first-year partnership schools fell within this bracket. Ninety-four per cent (29/31) of our partnership co-ordinators received a 0.1FTE time-buy out to lead the partnership in its first year. An induction day for these new partnership co-ordinators focused on purposeful enrichment and impact, with sessions introducing research-informed suggestions for effective activities and teaching approaches to build engagement.

Phiz Lab funding supports the development of a primary science environment to support teachers and engage pupils. There are currently 38 active Phiz Labs in our partnership programme and funding for the final 10 labs (£41,765) was awarded this year. A series of six Phiz Lab webinars sharing ideas and best practice for utilising these spaces were attended by 90 per cent of eligible teachers.

Partnership activities

Partnership funding helps to facilitate physics-focused activities that build science capital and engagement. The annual reporting showed that a total of 956 partnership activities/events took place in 2024–25, with a collective partnership grant spend of £222,402. These events, which included all partnership teacher development activities and enrichment, reached 239,245 participants.

To encourage partnerships to deliver proven, purposeful, physics-focused activities, the Trust provided a menu of suggested enrichment. The most widely reported activities were:

- Planetarium and stargazing events
- Physics photography and art competitions
- Interschool science and physics fairs

To facilitate more science ambassador programmes across partnerships, a research-informed skills framework has been developed to support key stage 2 teachers to lead effective science ambassador schemes. Seventy-four teachers took part in training sessions to learn more about developing and leading ambassador programmes, which resulted in 133 new student ambassadors in 16 partnership schools.

Secondary schools in current or legacy partnerships are eligible to apply for funding to support A-levels students to attend trips to CERN. The funds are directed to support those students who would otherwise be least able to participate due to their financial circumstances. In 2024–25, 11 CERN funding applications were made with grants totally £13,980. Two hundred and seventy-one students took part in the resulting CERN visits, with 72 students directly supported by grant.

> …there has been a notable increase in pupil participation in enrichment activities related to physics, including STEM clubs, guest speaker events, and science themed community events (e.g. an astronomy evening). These activities have been deliberately inclusive, with targeted outreach to ensure participation from students who might not traditionally see themselves represented in the field of physics. A key driver of this improvement has been our focus on equity, diversity, and inclusion (EDI). We have worked to ensure that physics is presented as a subject for everyone, highlighting diverse role models in science and embedding inclusive teaching practices.
>
> **School Partnership programme**

One hundred and thirty-four partnership co-ordinators and Ogden consultants attended our annual partnership conference, which this year focused on developing leaders. Sessions were built around the Education Endowment Foundation (EEF) implementation framework and included pedagogical approaches and planning for purposeful enrichment.

Professional development

Continuing professional development (CPD) is an important component of the partnership programme with sessions available for teachers from early years through to key stage 3. In the past year, primary and secondary CPD events reached more than 1,800 teachers and teaching assistants.

EYFS Science Talk
Support communication and language through understanding the world

Phizzi CPD
A four-year cycle of primary science CPD

Electricity

Forces

Light & Sound

Earth & Space

KS3 Physics CPD
Physics input, collaborative planning and reflection

Forces

Waves

Electricity

Matter

Energy

Space

To build solid physics foundations for young learners, our school partnerships can access a comprehensive programme of primary CPD. EYFS teachers and teaching assistants in primary schools in Year 1 of their Ogden partnership can participate in a Science Talk webinar, exploring how science can be used as a context for the core early years curriculum areas of communication, language, and understanding the world. More than 200 people from 157 schools participated in the **Science Talk** programme and following their webinar, each participating school received a set of Science Talk activity cards, a teacher handbook and a set of accompanying picture books.

Evaluation revealed that the key Science Talk takeaways for teachers were the use of picture books to integrate with science learning (37 per cent), introducing and reinforcing scientific concepts with the youngest of learners; the introduction of hands-on activities and resources to spark curiosity also resonated with participants (36 per cent). Overall, the evaluation showed that teachers felt inspired and motivated, reporting increased confidence and better practical strategies.

At least 176 teachers from 125 schools in year one partnerships took part in our **Find the Physics CPD** programme, joining the webinar and accessing supporting resources. Find the Physics helps teachers develop teaching strategies for guiding pupils in key stage 1 as they develop their working scientifically knowledge, and provides inspiration for physics-themed, curriculum-focused science enquiries that can be integrated into the curriculum.

Building on the literacy links in Science Talk, participants in Find the Physics valued for story hooks for science (40 per cent); the practical activities (37 per cent) and the curriculum integration (30 per cent). Teachers reported new understanding of progression and practical enquiry strategies.

In the academic year 2024–25, 1,192 teachers from 919 schools (83 per cent of eligible schools) took part in **Phizzi Forces CPD**. At the start of the day, all participating teachers were asked to give a confidence score on a scale of 0–10 in relation to their own subject knowledge of forces and their ability to guide their pupils to work scientifically in the context of forces. Teachers were asked the same questions at the end of the CPD day; an average upward shift of 2.78 was reported for content knowledge and 2.75 in their confidence to guide pupils to work scientifically.

Further evaluation highlighted that the teachers particularly valued the practical and

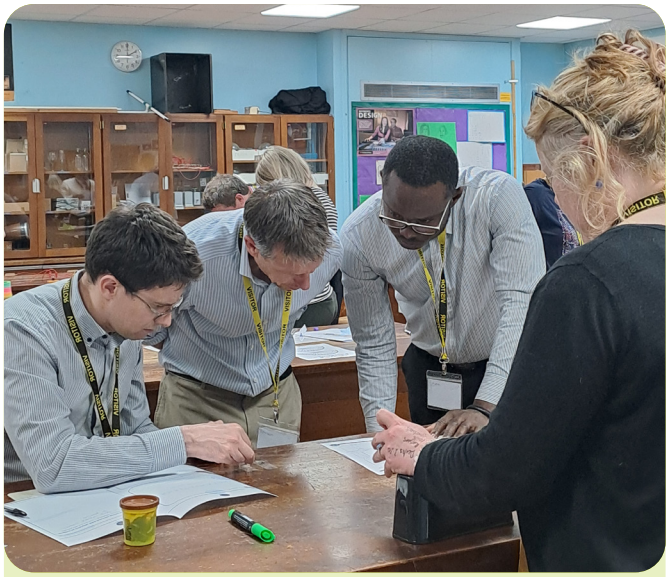
hands-on design of the learning, the resource sharing and collaboration on the day and the focus on working scientifically skills.

In the third and fourth year of a partnership, schools can take part in our **Primary Science Capital Teaching Approach (PSCTA) CPD** programme. This programme comprises a developing year and a second securing year, which was piloted in 2024–25.

This year, 31 teachers took part in our year one developing programme, learning how to implement the PSCTA in their classroom with the aim of making their science (primary physics) teaching more inclusive. Five teachers took part in the securing programme, aiming to lead a whole-school roll-out of the PSCTA. Two have submitted their portfolio of evidence for the securing programme, and three teachers are still working through the process.

To support progression from primary into secondary, partnerships can take part in **KS3 Improving Physics** CPD. This year, 73 teachers in Year 1 partnerships took part in sessions on forces, electricity and waves. The programme evaluation showed a strong appreciation for this professional learning which focused on hands-on practicals (34 per cent), modelling (39 per cent), and demonstrations (36 per cent). They also reported clearer understanding of misconceptions and improved vocabulary use. One hundred and sixty-one teachers in Year 2 partnerships participated in CPD sessions on matter, space and energy. The most widely valued takeaway from these sessions was the practical resources and activities (47 per cent). The evaluation also revealed strong evidence of improved subject knowledge and clarity on misconceptions, as well as increased confidence in using models, simulations, and precise terminology.

> The PSCTA has had a positive impact across all subjects, not just science. It has changed the way we think about how we meet the needs of our school community and individuals to ensure they have a sense of belonging and can see how the learning is relevant to them. It is a very subtle approach based on really knowing our children. Investing time to gather this information has been important and will continue to be a focus moving forward.
>
> **Primary Science Capital Teaching Approach**



The Red Kite Partnership piloted a new-format Improving Secondary Physics day in 2025.

Our partnership with CLEAPSS has continued, with a further 30 secondary physics technicians in partnership schools taking part in funded CPD – a 75 per cent increase in uptake on the previous year.

Building physics excellence and enthusiasm

When Mountbatten School set-up the Romsey Partnership they asked all teachers to self-assess their physics knowledge, which uncovered a lack of confidence in certain areas and some surprising pedagogical gaps, even amongst specialist teachers of physics. By making Ogden CPD sessions part of directed time, all teachers have attended, which has been hugely beneficial to ensure a coherent teaching approach, overcome any resistance to change, and drive a continuous cycle of improvement.

Ellie Peacock, Deputy Director of the Science Academy – a centre of excellence for science within the Mountbatten School, explains "because we've all done this really good CPD together, we can collectively agree on good ways of teaching things."

Learning from training is followed up and embedded in weekly departmental meetings, as Ed Gentle, Head of Science at the school describes: "We encourage different people to share good practice, things that they do which they don't consider remarkable, but actually are. It's not one person leading from the front. It's all of us inputting. And because we all go to the training and we all try things out, it's more of a level playing field."

> We have learned about so many simple, cost-effective practical activities to engage our students and assist them deepen their science knowledge. This has improved my confidence and that of my colleagues and ultimately benefits all our students.
>
> **Teacher of Physics, Mountbatten School**

"Experiments really help students' understanding," continues Ellie, "but some teachers shy away from demos because they are nervous or don't want to model it badly and are more comfortable just showing a video. The [Ogden CPD] sessions are building their confidence with practical work and giving them the resources to make it a standard thing they do in lessons. In terms of teacher learning, that's been a real key thing which has helped us."

Student voice surveys indicate a noticeable increase in favourable feelings towards physics, with a greater proportion saying that 'physics is relevant and interesting' and rating their self-efficacy in science more highly. Ed explains that incorporating more hands-on practical work into lessons has improved engagement and enjoyment.

Our teachers have been enthused and empowered by the work done with the Ogden Trust. Their pedagogy and planning are continually improving, and the partnership has played a significant role in this. It has allowed teachers to develop their skills and given unique opportunities not available in other schools. Extra-curricular science is blooming, and student interest is high.

"Our ambition is for Mountbatten's students to be the problem solvers and innovators of the future. To do this they need a first-class science education and, crucially, to be enthused about science and their own abilities. The work that the Ogden Trust partnership has done with our Science Academy has led the delivery of these aims and we could not be more pleased.

Ian Dunn, Assistant Head, Mountbatten School

Outside of the classroom Mountbatten's STEM Clubs and physics-related trips are now regularly oversubscribed, reflecting a positive attitudinal shift.

Enrichment events for students have not only created a buzz around science, but excitement with teachers outside of the science faculty too. "The big events put [physics] in the forefront of everyone's mind" says Ed. The kids will say 'I just saw this really cool thing!' and then they'll go and talk about it in English, or maths, or whatever their next lesson is." This raises the profile of physics, makes it easier to build curriculum connections with other subjects, and leads to a stronger whole-school approach overall.

As part of their Ogden partnership enrichment activity Mountbatten have organised an annual Big Bang Fair, involving a wide range of local STEM employers delivering engaging workshops. They have also introduced a 'STEM Person of the Week' spotlighting relatable individuals and offering students inspiring examples of success. These initiatives highlight how school physics is used in real-life, raise awareness of career pathways, and bring diverse professional role models into school.

Staff say that more students are now actively participating in physics-related work experience opportunities and have an increased enthusiasm for pursuing physics-related careers.

Evaluating and understanding the impact of our partnerships is important, especially as programme of school support will be changing in our new strategy from 2026. This case study has been produced by evaluation consultant, Dr Alison Rivett.

The Phizzi Forces training has had a significant impact on our school and across our trust. The engaging practical activities, the chance to share ideas, and the opportunity to genuinely reflect on our previous strategies and approaches made it an inspiring conference day. The excitement, the buzz, the brilliant conversations, and all the hands-on practicals created a real sense of enthusiasm. The high-quality, reliable equipment we received has already made a phenomenal difference in enabling children to experience more practical science.

Having now completed three Phizzi CPD sessions, we are seeing clear growth in staff confidence and a renewed enjoyment and love for teaching science. Teachers are showing greater confidence in tailoring planning to the needs of new cohorts, including pupils with greater SEND needs, ensuring that as a partnership we continue to think carefully about small, meaningful steps in learning. This progress stems from staff being able to fully trial each activity with new equipment, visualising how pupils will experience them, which has laid strong foundations for continued growth in science teaching and empowered staff to confidently translate the training into meaningful classroom practice.

Angelika Bowmer
Science Lead Practitioner, North Tyneside Learning Trust

Future priorities

Following the new strategy launch, the partnership programme will end and we will refocus support in secondary schools in a priority area and in large school trusts/ federations. Sandwell has been identified as our first priority area. During 2025 we will be finalising the details of the support packages available and will be building engagement and connections ready for September 2026.

Elements of our current partnership programme will be redefined and made more widely available either through professional development events or online resources.

Opportunities for all

The Trust is working to ensure that access to physics-related enrichment and future pathways are open to all regardless of socio-economic constraints or other barriers. We are supporting opportunities for universities and employers to engage with young people, taking physics beyond the classroom and giving an insight into the real-world application of science.

University engagement

The outreach officer network has been central to our university engagement work for nearly two decades. This year, as part of our strategic review and building on learning from our 2023 evaluation report[iv], we have been considering how we can best continue to support meaningful and sustained impact in the outreach and public engagement (OPE) sector. Central to our provision moving forward will be a refocus in emphasis from practice to leadership in OPE.

This year, our latest group of 16 people completed the Ogden/STFC funded programme in **Leadership for Outreach and Public Engagement**. This 12-month programme has been delivered to three cohorts between 2021 and 2025 and has reached a total of 47 people. The evidence in the evaluation report[v] published this year highlights the programme's role in embedding strategic engagement practice, strengthening institutional infrastructure, and supporting broader leadership development as part of academic career progression.

Building on the lessons learnt from this leadership programme and our additional programme of funding for outreach officer CPD which concluded this year, we have been developing a new skills framework to support OPE leaders to identify their professional growth priorities. The framework, developed in collaboration with the sector, has been designed for self-assessment and reflection and will help OPE practitioners identify their own professional growth priorities.

> [I have learned to be more] strategic in planning, delivering and evaluating the outreach activities [in] my department (e.g. connecting activities with goals and outcomes).
>
> **Leadership for Outreach and Public Engagement**

Outreach Officer meeting.

Following the success of the Interact Symposium, hosted in September 2024 at Northumbria University and attended by 184 delegates, a new **Learning Spaces** initiative for the physical sciences was launched. The Learning Spaces comprise a series of online panel discussions built on the themes from past symposia; they provide opportunities to share and reflect on practice, network and continue the conversations around public engagement in the physical sciences. Three sessions were held between May and June 2025, with a further three sessions taking place from September 2026. More than 170 people attended the first three sessions.

This year the Trust made 24 awards to individual undergraduate and postgraduate student ambassadors, recognising their commitment and contribution to OPE.

Employer engagement

Engaging with employers can provide a tangible connection between physics and future careers, highlighting the many and varied pathways that can emerge from studying physics and STEM subjects.

The Trust is engaging with employers and working in priority areas of deprivation through the **Coastal Energy internship programme**. The internships provide bursaries for Year 12 and Year 13 students to undertake a summer placement (typically 20 days) with a local company in (or connected with) the energy sector. Internships provide a vital springboard into future possibilities, broadening access to career insights, providing meaningful work experience and engaging students in crucial conversations about renewable energy and the environment. The internships are run in partnership with local education providers in East Anglia, Blyth and Ulverston, who each have a Coastal Energy College Champion.

Coastal Energy: Dudgeon skills-share day.

Since the programme launched 10 years ago, we have placed over 300 interns. This year, 51 (55: 2024) students undertook internships with 37 (40: 2024) host organisations, all gaining valuable work-place experience through meaningful projects. A growing number of host organisations fund or co-fund internships, including placements in East Anglia funded by Dudgeon Community Fund (10) and RWE (five); a further five placements were funded (and hosted) by Siemens in Ulverston.

> Coastal internships are making physics relevant – helping students to understand that what they've learnt at school and at college has an application in our sector. The internships help students to understand what careers are available to them locally and to develop some of the skills they need to be able to access those workplaces as well as building their confidence to go forward.
>
> **Sophie Skipp,**
> **Stakeholder Manager, Dudgeon**

> The summer internship has been an eye opener to the wide supply chain and roles involved with the engineering and energy sector.
>
> **Coastal Energy internships**

Priority actions

We will officially relaunch and expand our Outreach and Public Engagement Leadership network introducing an onboarding programme to enhance engagement.

We will curate a portfolio of professional development opportunities that will align with the leadership skills framework.

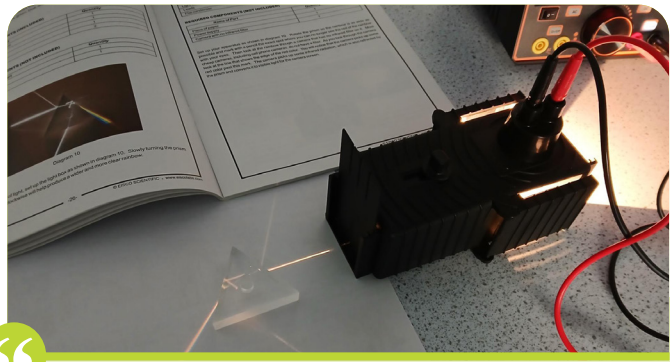
Coastal Energy Internships in East Anglia will now be led by the East of England Energy Group – a trade body representing the energy sector and its supply chain in the region. We will continue to manage the programme in Blyth, with the ambition to develop a similar local management model.

Grants

In 2024–25 there were three application windows for small grants to support the teaching and learning of physics; during these rounds, 55 new physics grant commitments were made totalling £112,240. In addition to this, a larger grant of £26,200 was awarded to support the annual Isaac Science Teacher Symposium, which saw 83 teachers gather at the new state-of-the-art Ray Dolby Centre, home to Cambridge's famous Cavendish Laboratory and the Department of Physics.

The Isaac Science platform is set to reach 200 million question attempts by the end of 2025. Independent evaluation using UCAS data shows that students, particularly those from under-represented backgrounds, who engage deeply with Isaac Science are more likely to apply to and receive offers from selective universities, and to achieve higher A-level grades in STEM subjects[vi].

In addition to these education grants, eight discretionary grants were made to organisations supporting other charitable interests of the Trustees.



Hill View is a new all-through SEND school. Our grant has enabled us to provide new curriculum-support equipment to engage and enthuse students with a love of physics and STEM discovery, and enquiry-based learning. Physics is being brought to life through tangible interaction rather than in theory through textbooks and presentations or videos. Students have enjoyed being able to use the power units and ray boxes to explore electricity and light, making rainbows with prisms. They have watched the Van de Graaff generator with awe and wonder, starting to link what they are seeing with lightning and exploring the role of static electricity in the real world. We are currently in our first term of Entry Level Science qualifications with Year 10, and as we move towards the physics element of this qualification, we are excited to be able to use the slinky, ripple tanks and oscilloscope to explore waves.

Philippa Huggins
Assistant Headteacher, Hill View School

"The course has been great – just knowing that there is so much support available for me as a teacher new to teaching A-level physics has been brilliant. It's given me lots of ways on how I can refresh my subject knowledge and improve my confidence in teaching physics at A-level."

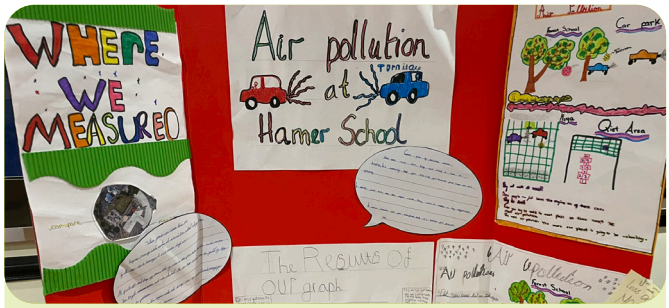
The latest teacher survey from Isaac Science, formally Isaac Physics, shows that teachers who use Isaac save an average of 5.5 hours per week, an enormous benefit for teachers whose time and energy are often over-stretched.

Supporting Rochdale

The Ogden Trust has long-standing connections with Rochdale, including our continuing support for the **Rochdale Science Extravaganza**, which this year saw thousands of families taking part in hands-on science, art, and climate action activities.

The Trust is also now supporting the **Atom Valley Education Challenge Consortium**[vii], partnering with the University of Cambridge to provide an enrichment programme for Year 5 pupils. The programme was designed to increase their sense of belonging in science with the long-term aim of addressing the barriers these pupils have to accessing progression in science and physics. Eight schools were invited to submit a team, with pupils researching and presenting their own science projects relevant to their local area. The teams came together in the summer to share their projects at a celebration event.

The **Rochdale Rockets STEM Programme**, run by Rochdale AFC Community Trust, has also received funding from the Trust. The programme aims to inspire young minds in the community using physics education intertwined with the excitement of football. Feedback has shown that the programme helped to engage young learners (78 per cent) and helped them to learn new skills (100 per cent).



Atom Valley enrichment projects, building teamwork and science capital.

For Generations to Come, May 2025 launch event.

The Ogden Trust has partnered with Rochdale AFC Community Trust to launch **Dale Futures CIC**. From September 2025, Dale Futures will offer alternative provision for secondary schools in Rochdale, supporting young people to secure their engagement and reintegration in education. The Trust has provided a grant award of £230,000 to help establish this initiative and to support the delivery of high-quality provision. Clare Harvey and Cameron Ogden both sit on the board for Dale Futures.

> Dale Futures is building strong foundations from which we can launch new initiatives to support and enhance the pathways available to young people in Rochdale.
>
> **Dillon Yates, Director, Dale Futures**

These Rochdale activities run alongside the **For Generations to Come** initiative in the town, which has also received Ogden Trust funding. Launched in May when more than 200 people gathered at Rochdale Town Hall to celebrate the town's strengths and start shaping its future, For Generations to Come aims to spark ideas, build connections and support long-term positive change in Rochdale.

The Trust will be the lead sponsor for the Raising Rochdale Education Awards, which will be taking place in November 2025 and are aimed at improving the life chances of children and young people in the town.

Communications and research

Budget constraints and ongoing teacher shortages continue to build pressure on schools; releasing teachers for professional development is becoming increasingly challenging but also ever more critical. We need to ensure that the Ogden Trust is a trusted voice in the education sector and that teachers and senior leaders sufficiently value our professional development to release teachers from the classroom.

We continue to build our profile on social media, maintaining an active presence across several channels; according to recent research only 65 per cent of teachers are now using social media for work and there is no clear preference in terms of the platform.[viii] LinkedIn continues to offer the biggest audience growth, and we now have more than 2,100 followers (August 2024: 1,325).

We are continuing to focus our participation – as presenters or exhibitors – at national education conferences that are best placed to help us reach senior school and subject leaders in our priority areas, including the Association of School and College Leaders (ASCL) and Association for Science Education (ASE) conferences.

We are also working in partnership with other organisations in the sector to amplify our voice. This year at the Education: Insights from Practice for Policy information exchange event we presented a poster jointly with the Institute of Physics. The event provided a valuable opportunity for educators to share their insights about key educational issues and we were able to showcase Ogden programmes that address these issues.

This year, we commissioned a 'state of the nation' sector report in partnership with the Primary Science Teaching Trust and SEERIH (The University of Manchester). Conducted by ImpactEd Group (and published in October) **The State of Primary Science in the UK (2025)**[ix] builds on the Wellcome Trust's 2017 baseline to provide an updated picture of teaching and leadership in primary science.

We have also co-funded an **ASPIRES Physics Report** with the Institute of Physics, which will be published in 2026. This report will build on data from the longitudinal ASPIRES 3 research project with a focus on physics, and is expected to show that there is still much to be done to ensure more equitable access and aspirations across gender, race and social divides.

Priority actions

We will develop and deliver a more considered, structured social media plan continuing to build audience on LinkedIn and developing our YouTube channel as more video teaching resources are produced. This process needs to be informed by a more comprehensive use and evaluation of analytics.

We will continue to build our profile in education media, at events and through podcasts to raise awareness of the Trust and reach a broader audience.

Governance, structure and management

Constitution

The organisation was registered as an unincorporated charity on 25 March 1994. The charity is governed by a trust deed, and a supplemental deed dated 18 May 1998. It is registered with the Charity Commission, Charity Registration Number 1037570.

The charitable objects of the Trust (updated in 2022) allow the Trustees to advance general charitable purposes, in particular, but not limited to:
(i) the advancement of education;
(ii) the advancement of science; and
(iii) the prevention or relief of poverty and the relief of those in need, by reason of youth, age, ill-health, disability, financial hardship or other disadvantage.

Appointment of Trustees

The Trustees are appointed by the existing Trustees. At any one time, there must be a minimum of three Trustees. There were no changes to the Trustee board this year.

Induction and training of Trustees

When new Trustees are appointed, there are procedures in place to ensure that they clearly understand their duties and responsibilities and can assess their own training needs. Most Trustees are long-standing and can support the development of new members of the Board.

The Trustees are briefed bi-annually by the Chief Executive about their responsibilities and liabilities as Trustees.

Organisational structure and decision making

The Trustees are responsible for the policies, activities and assets of the charity. They meet four times a year to review developments and activities, and to make any important decisions. When necessary, the Trustees seek advice and support from the charity's professional advisers, including investment managers and accountants. Expert advisers in physics education may also be consulted where appropriate. All trustees give their time voluntarily and receive no benefits from the charity. Any expenses reclaimed from the charity are set out in note 12 to the accounts.

The day-to-day management of the charity's activities, and the implementation of policies, is delegated to Clare Harvey, Chief Executive, in line with an agreed scheme of delegation. At their meetings, the Trustees will review the investment performance, strategic changes to programmes, the impact of programme activities and grant proposals. The Chief Executive's pay is determined by the Trustees who consider a range of factors.

Diversity and inclusion

Diversity and inclusion are core values of our organisation, and we are committed to providing a welcoming environment for everyone, reducing barriers to engagements and promoting inclusive teaching and engagement practices. Delivery and development of our equity, diversity and inclusion strategy is reviewed and monitored annually in consultation with our advisory panel, which this year welcomed two new members following an open recruitment process. We continue to prioritise time across our teams to reinforce learning, awareness and understanding in the areas of equity, diversity and inclusion.

A staff wellbeing committee continues to inform office policy and procedures, and a trained mental health first aider is available within the team; staff can also access an employee assistance programme which provides a range of free, confidential support for any issues staff may be experiencing at work or in their personal life.

Financial summary

Key financial performance indicators

The Trust makes a significant financial investment in direct programme support each year, primarily professional development activities for teachers, with several programmes including funding. In addition, smaller grants (typically less than £5,000) are awarded each year outside of our programmes to support schools, colleges and other organisations who wish to carry out projects or activities that support the teaching and learning of physics. Total charitable expenditure in 2024–25 was £3,778,104, a moderate increase from £3,393,297 in 2024–25. Of this expenditure, £3,313,461 was spent directly on physics education activities. Spend has increased across all the programme areas with the exception the School Partnerships programme and other physics activities, both of which are contracting. The School Partnerships programme still constitutes the biggest single area of spend.

Expenditure by programme

September 2024–August 2025

- School Partnerships
- Teacher Support
- Ogden Outreach Officers
- Teach Physics internships
- Grants and bursaries
- Other physics activities
- Subject Knowledge for Physics Teaching

Expenditure by type

September 2024–August 2025

- Direct costs
- Grant funding
- Support and governance

The investment gain in this period was above target, and the portfolio remains within the higher end of our reserves target. The Trustees are always aware that there are external factors which could affect the achievements of their objectives as all of the Charity's assets are made up of investments and cash, the result of which are dependent on the general performance of the UK and overseas stock markets. To minimise this risk, the Trustees set prudent investment policies and place reliance on the investment managers to monitor and advise on necessary investment changes and suitable asset allocation.

Investment policy and performance

There are no restrictions on the charity's power to invest. The investment strategy is set by the Trustees and takes into account income requirements, the risk profile and the investment manager's view of the market prospects in the medium term. The overall investment policy is to maximise total return with a target of 5 per cent; this year we have seen continuing good growth on investment,

Reserves policy

As explained above, the charity carries out a range of activities, some of which comprise projects requiring significant ongoing financial commitment and investment. The Trustees have examined the requirements for free reserves, i.e, those unrestricted funds not designated for specific purposes or otherwise committed. As most of the investments are liquid, the majority of the Trust's funds are free reserves.

The Trustees' policy is to manage financial resources in such a way as to provide in full for the grant and bursary commitments made, and to ensure similar levels of commitment in the future. The free reserves must therefore be sufficient to generate enough return to allow this to happen. In the current financial climate, the Trustees estimate this amount to be £50,000,000–£70,000,000.

The balance sheet shows free reserves (unrestricted funds less tangible fixed assets) of £75,098,446 (2024: £72,366,641), which continues to exceed the target parameters and therefore provides room for growth in our programmes.

Risk management

In line with the requirement for Trustees to undertake a risk assessment exercise and report on the same in their annual report, the Trustees have looked at the risks The Ogden Trust currently faces and have reviewed the measures in place, or needing to be put in place, to deal with them. The Trustees have identified seven main areas where risks may occur, and a comprehensive risk register has been produced.

Having assessed the major risks to which the charity is exposed, in particular those relating to its investments and its finances, the Trustees believe that by monitoring reserve levels, ensuring controls exist over key financial systems, and by examining the grant management processes carried out by the charity they have established effective systems to mitigate those risks.

Threats to cyber security are an ongoing consideration and remain on our register of risk, with measures in place to mitigate against loss of funds or data caused by a cyber security breach.

Risk	Mitigation
Poor investment returns	These are monitored in quarterly Trustees' meetings and if poor returns are expected grant making can be reduced or halted.
Cyber security breach	The Trust has achieved Cyber Essentials Plus accreditation, meaning systems are in place to help counter any cyber breaches or fraud; in addition, the Trust has cyber security insurance in place.
Programme participants behaving in an inappropriate fashion	Programme participants are in contact with the Trust throughout the duration of their programme and such behaviour can be addressed when required.
Grant holders misspending funds	Grant holders are required to account for their spending in their reporting and misspent funds can be reclaimed.
Safeguarding	The Trust has a safeguarding children policy as well as staff behaviour policies. All staff have undertaken child protection and safeguarding training.
Sickness affecting staff	Processes and procedures are now in place for a hybrid working model. When staff are in the office, it is well spaced, ventilated and regularly cleaned. Staff are encouraged to work from home if appropriate to prevent the spread of illnesses.
Data protection	The Trust has a data protection policy and a retention and disposal policy. The Chief Executive is the Data Protection Officer. All staff have had training on data protection.

i www.publicengagement.ac.uk/resources/reports-and-reviews/reviewing-public-engagement-physics-and-engineering-ref2021
ii www.ogdentrust.com/about-us/publications-and-research/insights-and-experiences-of-school-physics/
iii A report from Teacher Tapp this year revealed that although there has been a significant decline in the number of teachers using X in relation to their work, more than a third of secondary teachers were still on X when the report data was gathered. https://teachertapp.co.uk/app/uploads/2024/07/7-Types-Of-Teachers-On-SocialMedia-2024.pdf
iv Examining the institutional impact of Ogden Trust funding for physics outreach officers
v Evaluation report: Outreach and Public Engagement Leadership programme
vi Research from Isaac Science
vii A coalition between the University of Cambridge, St John's College (Cambridge), Pembroke College (Oxford), Rochdale Sixth Form College, The Altus Education Partnership, Rochdale Council and Rochdale Development Agency
viii 7 Types of Teachers on social media 2025, Teacher Tapp
ix The State of Primary Science in the UK (2025)

Trustees' responsibility statement

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

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity 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 judgments and accounting estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation;
- 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.

The Trustees are responsible for keeping proper accounting records that are sufficient to show and explain the charity's transactions and disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity 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 charity's auditor is unaware;
- they 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 charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

This report was approved by the Trustees, on 2 February and signed on their behalf by:

Cameron Ogden

Independent auditor's report to the Trustees of The Ogden Trust

Opinion

We have audited the financial statements of The Ogden Trust (the charity) for the year ended 31 August 2025 which comprise the statement of financial activities, balance sheet, statement of cash flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- Give a true and fair view of the state of the charity's affairs as at 31 August 2025 and of its incoming resources and application of resources for the year then ended.
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice.
- Have been prepared in accordance with the requirements of the Charities Act 2011.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charity's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees' annual report other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit, or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charity and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' annual report.

We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 requires us to report to you if, in our opinion:

- sufficient accounting records have not been kept;
- the financial statements are not in agreement with the accounting records and returns; or
- we have not obtained all the information and explanations necessary for the purposes of our audit.

Responsibilities of trustees

As explained more fully in the statement of trustees' responsibilities set out in the trustees' annual report, the trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charity or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic deci-sions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud are set out below.

In identifying and assessing risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, our procedures included the following:

- We enquired of management, which included obtaining and reviewing supporting documentation, concerning the charity's policies and procedures relating to:
  - Identifying, evaluating, and complying with laws and regulations and whether they were aware of any instances of non-compliance;

  - Detecting and responding to the risks of fraud and whether they have knowledge of any actual, suspected, or alleged fraud;
  - The internal controls established to mitigate risks related to fraud or non-compliance with laws and regulations.
- We inspected the minutes of meetings of those charged with governance.
- We reviewed the financial statement disclosures and tested these to supporting documentation to assess compliance with applicable laws and regulations.
- We performed analytical procedures to identify any unusual or unexpected relationships that may indicate risks of material misstatement due to fraud.
- In addressing the risk of fraud through management override of controls, we tested the ap-propriateness of journal entries and other adjustments, assessed whether the judgements made in making accounting estimates are indicative of a potential bias and tested significant transactions that are unusual or those outside the normal course of business.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the Charity's trustees, as a body, in accordance with section 144 of the Charities Act 2011 and the regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the Charity's trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charity's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Goldwins

Goldwins Limited
Chartered Accountants
Statutory Auditor
75 Maygrove Road
West Hampstead
London NW6 2EG
Date: 3 February 2026

Goldwins Limited is eligible for appointment as auditor of the charity by virtue of its eligibility for appointment as auditor of a company under section 1212 of the Companies Act 2006

Statement of financial activities for the year ended 31 August 2025

	Note	Unrestricted funds 2025 £	Restricted funds 2025 £	Total funds 2025 £	Total funds 2024 £
Income from					
Donations	2	-	14,217	14,217	23,758
Charitable activities	3	538,883	-	538,883	191,599
Investments	4	604,657	-	604,657	570,782
Other income	5	4,296	-	4,296	577
Total income		**1,147,836**	**14,217**	**1,162,053**	**786,716**
Expenditure on					
Raising funds	6	393,763	-	393,763	374,571
Charitable activities	7	3,748,687	29,417	3,778,104	3,393,297
Total expenditure		**4,142,450**	**29,417**	**4,171,867**	**3,767,868**
Net (expenditure)/ income before investment gains		**(2,994,614)**	**(15,200)**	**(3,009,814)**	**(2,981,152)**
Net gains on investments	13	5,720,948	-	5,720,948	11,011,928
Net income/ (expenditure)		**2,726,334**	**(15,200)**	**2,711,134**	**8,030,776**
Net movement in funds		**2,726,334**	**(15,200)**	**2,711,134**	**8,030,776**
Reconciliation of funds					
Total funds brought forward		72,387,557	15,200	72,402,757	64,371,981
Total funds carried forward	20	75,113,891	-	75,113,891	72,402,757

The notes on pages 36 to 61 form part of these financial statements.

Balance sheet as at 31 August 2025

	Note	31 August 2025 £	31 August 2024 £
Fixed assets			
Tangible assets	12	15,445	20,916
Investments	13	75,590,183	72,862,480
Total fixed assets		**75,605,628**	**72,883,396**
Current assets			
Debtors	14	193,677	131,144
Cash at bank and in hand		87,786	46,615
		281,463	**177,759**
Creditors: amounts falling due within one year	15	(718,424)	(571,188)
Net current liabilities		**(436,961)**	**(393,429)**
Total assets less current liabilities		**75,168,667**	**72,489,967**
Creditors: amounts falling due after more than one year	16	(54,776)	(87,210)
Net assets		**75,113,891**	**72,402,757**
Charity funds			
Unrestricted funds	20	**75,113,891**	**72,387,557**
Restricted funds	20	**-**	**15,200**
Total funds		**75,113,891**	**72,402,757**

The notes on pages 36 to 61 form part of these financial statements.

The financial statements were approved by the Trustees on 2 February 2026 and signed on their behalf, by:

Cameron Ogden
Trustee

Statement of cash flows for the year ended 31 August 2025

	Note	2025 £	2024 £
Cash flows from operating activities			
Net cash used in operating activities	17	**(2,286,772)**	**(4,011,846)**
Cash flows from investing activities			
Dividends, interests and rents from investments		604,657	570,782
Purchase of property, plant and equipment		(3,622)	(5,376)
Proceeds from sale of investments		1,726,908	3,297,272
Proceeds from sale of property, plant and equipment		-	550
Net cash provided by investing activities		**2,327,943**	**3,863,228**
Change in cash and cash equivalents in the year		**41,171**	**(148,618)**
Cash and cash equivalents at the beginning of the year		46,615	195,233
Cash and cash equivalents at the end of the year		**87,786**	**46,615**

The notes on pages 36 to 61 form part of these financial statements.

Notes to the financial statements for the year ended 31 August 2025

1. Accounting policies

1.1 Basis of preparation of financial statements

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant notes to these accounts. The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (second edition – October 2019) (Charities SORP (FRS 102)) the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The financial statements have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair view'. This departure has involved following Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 rather than the Accounting and Reporting by Charities: Statement of Recommended Practice from 1 April 2005 which has since been withdrawn.

No significant estimates or judgements have been made by management in preparing these financial statements.

The Ogden Trust constitutes a public benefit entity as defined by FRS 102.

1.2 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The costs of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

1.3 Going concern

The Trustees have reviewed the financial position of the charity and have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Accordingly, the financial statements continue to be prepared on the going concern basis

1.4 Income

All income is recognised once the charity has entitlement to the income, it is probable that the income will be received and the amount of income receivable can be measured reliably.

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity; this is normally upon notification of the interest paid or payable by the Bank.

Dividends are recognised once the dividend has been declared and notification has been received of the dividend due.

Income tax recoverable in relation to investment income is recognised at the time the investment income is receivable.

Donation income is recognised when received.

Other income is recognised in the period in which it is receivable and to the extent the goods have been provided or on completion of the service.

1.5 Expenditure

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

Support costs, including governance costs are those costs incurred directly in support of expenditure on the objects of the charity and include management carried out at the principal office. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements. Support and governance costs have been allocated to activities based on staff time spent.

Grants payable are charged in the year when the offer is made except in those cases where the offer is conditional, such grants being recognised as expenditure when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the period end are noted as a commitment, but not accrued as expenditure.

Expenditure on raising funds represents the fees paid to investment managers in connection with the management of the Charity's listed investments.

All resources expended are inclusive of irrecoverable VAT.

1.6 Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

1.7 Tangible fixed assets and depreciation

Tangible fixed assets are carried at cost, net of depreciation and any provision for impairment. Depreciation is provided at rates calculated to write off the cost of fixed assets, less their estimated residual value, over their expected useful lives on the following bases:

Office equipment	20% per annum based on cost
Computer equipment	25% per annum based on cost

1.8 Investments

Fixed asset investments are a form of financial instrument and are initially recognised at their transaction cost and subsequently measured at fair value at the Balance Sheet date, unless fair value cannot be measured reliably in which case it is measured at cost less impairment.

All gains and losses are taken to the Statement of Financial Activities as they arise. Realised gains and losses on investments are calculated as the difference between sales proceeds and their opening carrying value or their purchase value if acquired subsequent to the first day of the financial year. Unrealised gains and losses are calculated as the difference between the fair value at the year end and their carrying value.

Investment gains and losses, whether realised or unrealised, are combined and shown in the heading 'Gains/(losses) on investments' in the Statement of Financial Activities.

1.9 Foreign currencies
Monetary assets and liabilities denominated in foreign currencies are translated into sterling at rates of exchange ruling at the balance sheet date.

Transactions in foreign currencies are translated into sterling at the relevant monthly average exchange rate.

Exchange gains and losses are recognised in the Statement of Financial Activities.

Foreign exchange gains and losses arising on investments are disclosed within gains/(losses) on revaluations of fixed assets on the Statement of Financial Activities.

1.10 Debtors
Trade and other debtors are recognised at the settlement amount 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 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.

1.12 Creditors and provisions
Liabilities are recognised when there is an obligation at the Balance Sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably. Liabilities are recognised at the amount that the charity anticipates it will pay to settle the debt or the amount it has received as advanced payments for the goods or services it must provide. Provisions are measured at the best estimate of the amounts required to settle the obligation. Where the effect of the time value of money is material, the provision is based on the present value of those amounts, discounted at the pre tax discount rate that reflects the risks specific to the liability. The unwinding of the discount is recognised within interest payable and similar charges.

1.13 Pensions
The charity operates a defined contribution pension scheme, and the pension charge represents the amounts payable by the charity to the fund in respect of the year

1.14 Critical accounting estimates and areas of judgement
Preparation of the financial statements requires management to make significant judgements and estimates. The key areas in the financial statements where these judgements and estimates have been made are as follows:

- depreciation on fixed assets;
- fair value of investments, and;
- grants accrued payable in more than one year.

2. Income from donations

	Unrestricted funds 2025 £	Restricted funds 2025 £	Total funds 2025 £	Total funds 2024 £
Donations	-	22,750	**22,750**	10,425
Grants	-	(8,533)	**(8,533)**	13,333
	-	**14,217**	**14,217**	**23,758**

In 2024, all grant and donation income was restricted.

3. Income from charitable activities

	Unrestricted funds 2025 £	Restricted funds 2025 £	Total funds 2025 £	Total funds 2024 £
Science CPD programme (STEM Learning Ltd)	479,495	-	**479,495**	**182,070**
IOP scholarships support	59,388	-	**59,388**	9,529
	538,883	-	**538,883**	**191,599**

4. Investment income

	Unrestricted funds 2025 £	Restricted funds 2025 £	Total funds 2025 £	Total funds 2024 £
Income from listed investments	550,438	-	550,438	555,921
Interest on bank fixed deposits	54,219	-	54,219	14,861
	604,657	**-**	**604,657**	**570,782**

In 2024, all investment income was unrestricted.

5. Other income

	Unrestricted funds 2025 £	Restricted funds 2025 £	Total funds 2025 £	Total funds 2024 £
Sale of furniture and IT equipment	500	**-**	500	550
Cashback	423	**-**	423	27
Venue hire	238	**-**	238	-
Madoff Victims Fund Compensation	3,135	**-**	3,135	-
	4,296	-	**4,296**	**577**

6. Investment management costs

	Unrestricted funds 2025 £	Total funds 2025 £	Total funds 2024 £
Investment manager's fees	578,537	578,537	562,488
Investment management fee rebate	(184,774)	(184,774)	(187,917)
	393,763	**393,763**	**374,571**

The rebate was negotiated by the trustees and is equivalent to a third of their 1.5% management fee charged to the Omnia Fund L.P. for dealing with the Fund's affairs. In 2024 all expenditure on investment management costs was unrestricted.

7. Analysis of expenditure

Analysis of expenditure: current year

	Direct costs 2025 £	Grant funding of activities (note 8) 2025 £	Support & governance costs (note 9) 2025 £	Total 2025 £	Total 2024 £
School Partnerships	615,216	495,667	599,328	1,710,211	1,792,621
Teacher Support	200,247	94,934	235,602	530,783	467,628
Ogden Outreach Officers	57,067	26,130	99,218	182,415	177,148
Teach Physics internships	5,017	110,786	33,036	148,839	89,890
Grants	16,601	120,093	16,518	153,212	184,703
Other physics activities	166,811	47,150	99,218	313,179	429,477
Subject Knowledge for Physics Teaching (SKPT)	274,822	-	-	274,822	176,264
Physics education subtotal	**1,335,781**	**894,760**	**1,082,920**	**3,313,461**	3,317,731
Rochdale Support	**36,652**	**321,950**	**24,777**	**383,379**	**-**
Other charitable purposes	**-**	**72,893**	**8,371**	**81,264**	**75,566**
All charitable activities	**1,372,433**	**1,289,603**	**1,116,068**	**3,778,104**	**3,393,297**
2024	1,429,600	915,476	1,048,221	3,393,297	

In 2024, charitable activities expenditure amounting to £20,678 was restricted.

The support and governance costs have been allocated to direct and grant making activities based on staff time spent. Total support costs allocated to grant activities is £472,947.

8. Grants payable

	2025 £	2024 £
Grants to institutions:		
Primary schools	351,776	269,497
Secondary schools	313,151	296,518
School trusts	17,385	39,558
Universities	49,718	28,929
Organisations	417,225	166,439
Subtotal	**1,149,255**	**800,941**
Grants to individuals	140,348	114,535
Total	**1,289,603**	**915,476**

342 grants were awarded in 2025, compared with 337 grants in 2024.

Grants payable to institutions, net of write backs are as follows:

Primary schools	2025 £	2024 £
Abbey Village Primary School	2,200	3,550
Arena Academy	2,000	-
Arnot St Mary	2,500	-
Ashton Gate Primary School	-	500
Austhorpe Primary School	20,000	-
Avonmore Primary School	-	(1,000)
Belgrave St Bartholomew's Academy	2,500	2,500
Bignold Primary School	-	250
Blowers Green Primary	1,100	1,070
Bramford Primary School	-	2,500
Briar Hill Infant School	-	5,290
Brook Lodge Primary School	-	1,900
Brunswick Primary School	2,500	-
Chard Preparatory School	-	2,500
Charlton Primary School	1,000	2,500
Chestnuts Primary School	850	1,930
Christ Church Moreton	10,000	-
City of London Academy	-	2,000
Clayton le Moors All Saints' CE	5,000	-
Cleveland Coast	-	3,400
Combe St Nicholas Church of England Primary School	2,500	2,500
Copley Primary School	-	1,000
Court de Wyck Church School	3,000	9,727
Cranbury College	1,000	-

Primary schools (continued)	2025 £	2024 £
Cutcombe Church of England First School	-	250
Daven Primary School	-	250
De Beauvoir Primary School	-	5,000
Denbigh Primary School	1,000	2,500
Discovery Primary Academy	2,500	-
Ditchingham Primary Academy	-	1,900
Ditchling Primary School	6,520	-
Downsbrook Primary School	2,500	-
Durham Gilesgate Primary School	-	1,000
Easton Church of England Academy	(463)	463
Errington Primary School	1,900	-
Essex Primary School	-	4,770
Eton Park Junior Academy	8,000	-
Falmouth Primary Academy	-	2,500
Ferndale Primary and Nursery School	-	830
Flash Ley Primary	1,000	-
Four Dwellings Primary Academy	1,000	-
Goldsmith Primary Academy	3,500	-
Great Hollands Primary School	-	2,500
Greenmount Primary School	-	2,000
Greenway Primary School	(2,000)	6,904
Greet Primary School	2,500	5,500
Grimley and Holt Primary School	1,000	2,500
Gurnard Primary School	(250)	250
Hartest Primary School	7,700	-
Hazeldene School	1,000	2,500
Hempshill Hall Primary School	2,500	2,500
Higher Lane Primary School	5,000	5,000
Hillmorton Primary School	250	-
Hollingworth Primary School	4,000	5,150
Holy Family RC School	-	(2,500)
Holy Trinity Primary School	-	4,500
Holycroft Primary School	2,000	7,500
Hopwood Primary School	-	250
Hurst Knoll St James Primary School	-	150
Kents Hill Park School	2,500	-
Kernow Learning	-	1,000
Kessingland Church of England Primary Academy	(2,216)	2,500
Kings Ash Academy	-	1,000
Ledbury Primary School	-	250

Primary schools (continued)	2025 £	2024 £
Lickhill Primary School	2,500	5,500
Little Sutton Primary School	-	250
Livingstone Primary And Nursery School	-	150
Marden Primary Academy	500	-
Mendham Primary School	7,000	-
Mersea Island School	4,950	-
Millbrook Primary and Nursery School	-	150
Milnrow Parish Church of England Primary School	250	250
Monk Fryston Church of England Primary School	7,500	5,000
Monkhouse Primary School	10,000	-
Morgans Primary School	-	2,500
Mount Pleasant Junior School	5,500	-
New Horizons Primary School	300	-
New York Primary School	-	1,000
Norton Infant School	5,000	-
Ormiston Cliff Park Primary Academy	-	2,500
Ormskirk West End Primary School	7,000	-
Our Lady and Saint Kenelm Primary School	(250)	250
Our Lady of Mount Carmel Catholic First School	250	250
Our Lady of Mount Carmel Roman Catholic Primary School	1,850	3,500
Our Lady of Walsingham Roman Catholic Primary School	-	250
Outwood Primary Academy Lofthouse Gate	20,000	14,000
Outwood Primary Academy Park Hill	2,500	-
Oval Learning Cluster	-	2,500
Pearl Hyde Primary School	1,000	2,500
Pluckley Church of England Primary School	6,000	16,000
Princes Risborough Primary School	-	2,500
Quay Academy	400	1,000
Rainford Brook Lodge Primary	2,400	-
Red Oak Primary School	-	1,000
Richard Taylor Church of England Primary School	-	600
Rockingham Junior and Infant School	1,000	2,500
Rushton CE Primary School	1,000	-
Rustington Community Primary School	(1,000)	10,000
Ryders Hayes Primary School	5,500	-
Sandfield Close Primary School	2,500	2,500
Sandon Primary Academy	-	2,500
Saxmundham Primary School	6,954	-
Saxon Way Primary School	2,500	-
Silver Springs Primary Academy	-	150

Primary schools (continued)	2025 £	2024 £
Skelton Primary School	12,042	-
Somerleyton Primary School	(250)	250
St Agnes Academy	1,000	-
St Agnes Church of England Primary School	-	1,000
St Bernadette's Catholic Primary School	2,500	-
St Catherine's Prep School	-	720
St Charles' Catholic Voluntary Academy	5,500	-
St Christopher's Catholic Primary School	-	250
St Clements Church of England Primary	-	(1,500)
St Edward's Catholic Academy	-	1,000
St George's Catholic Voluntary Academy	8,000	-
St George's Church of England Primary School	-	150
St George's Primary School	2,400	2,200
St John's Primary and Nursery School	-	1,000
St Joseph's Catholic Primary School	1,000	7,500
St Joseph's RC Primary School	4,000	-
St Laurence's Catholic Primary School	1,000	2,500
St Leonard's Primary School	-	600
St Matthew's Catholic Primary School	250	600
St Patrick and St Edmund's Catholic Primary School	2,500	-
St Pauls Church of England Primary School	-	300
St Peter and St Paul CE Primary School	11,000	-
St Peter in Thanet CE Junior School	250	-
St Peters and St Pauls Burgh Le Marsh	5,500	-
St Peter's Elwick Church of England Primary School	100	650
St Peters Junior School	2,150	5,000
St Stephen and All Martyrs CofE Primary School	5,500	-
St Stephen Churchtown Academy	250	-
Storrington Primary School	8,000	-
Streatham Wells Primary School	-	1,000
Summerfields Primary	5,000	5,500
Summerhill Academy	9,000	7,000
Summerhill Primary Academy	-	4,000
Sutton in Craven CP School	-	1,000
Sylvester Primary Academy	11,764	10,000
The Prince of Wales School	8,000	-
The Redstart Primary School	-	5,000
Treloweth School	5,000	-
Trinity Primary Academy	-	(250)
Trumpington Park Primary School	-	2,500

Primary schools (continued)	2025 £	2024 £
Walford Nursary and Primary School	250	250
Walsden St Peter's Primary School	5,500	-
Walton Priory Middle School	1,000	1,870
Warren Road Primary Academy	5,500	-
Waterside Primary School	1,000	300
Westminster Primary Academy	-	723
Whitecote Primary School	-	1,000
Whitehouse Common Primary School	250	-
Whoberley Hall Primary School	8,000	-
Willow Brook Primary School Academy	(4,375)	8,400
Woodham Academy	2,500	2,500
Woodton Primary School	6,500	5,000
Wybourn Community Primary School	-	1,000
Wyndcliffe Primary School	2,500	-
Wyvil Primary School	1,000	-
Yew Tree Primary School	-	150
Total	**351,776**	**269,497**

Secondary schools	2025	2024
Ada Lovelace Church of England High School	1,000	-
Alder Community High school	3,950	4,250
Alexandra Park School	(1,773)	-
Alperton Community school	-	400
Alsop High School	1,800	5,500
Arrow Vale Academy	-	1,000
Ashlyns School	-	157
Ashton Community Science College	(1,652)	(751)
Bede Academy	750	-
Bedlington Academy	-	2,500
Beechen Cliff School	-	200
Benfield School	1,500	-
Bexleyheath Academy	1,000	-
Bishop Barrington School	(1,060)	(1,396)
Bishop Fox's School	-	1,000
Blackpool Aspire Academy	-	(1,000)
Blessed Edward Oldcorne Catholic College	750	-
Bonus Pastor Catholic College	17,550	1,000
Boston Endeavour Academy	(500)	500
Bridgemary School	2,500	-

Secondary schools (continued)	2025 £	2024 £
Burlington Danes Academy	-	-
Burnley College	-	1,785
Cambourne Village College	(1,836)	12,933
Castle Rock School	-	2,000
Central Foundation Boys' School	2,200	-
Cheltenham Bournside School	5,350	2,500
Chiltern Learning Trust	-	1,000
Chilton Academy	(250)	6,965
Chipping Campden School	6,855	4,570
Church Hill Middle School	7,000	-
Churchill Community College	(2,000)	-
Churchmead School	1,000	-
City of London Academy Highgate Hill	-	3,500
Cleeve School	1,000	2,500
Consett Academy	-	500
Co-op Academy Manchester	-	320
Dane Court Grammar School	(1,269)	-
Dawlish College	998	-
Deer Park School	4,665	5,100
Devonport High School for Boys	14,456	-
Didsbury High School	7,399	1,000
Diss High School	(500)	500
Dormers Wells High School	5,500	-
Durham School	2,500	-
Durham Sixth Form Centre	-	3,000
East Norfolk Sixth Form College	-	2,000
Eastbury Community School	-	600
Elizabeth Garrett Anderson School	-	1,050
Elton High School	(7,118)	7,118
Enfield County School for Girls	-	1,500
Exeter School	(250)	250
Fairfax Academy	2,500	-
Finham Park 2	2,500	-
Fleetwood High School	6,148	-
Fortsimere School	-	1,000
Fowey River Academy	1,000	-
Framingham Earl High School	4,150	5,500
Framwellgate School Durham	100	-
Goodwin Academy	2,000	-
Gosforth Academy	1,500	-

Secondary schools (continued)	2025 £	2024 £
GUST Independent School	750	-
Hadley Learning Community	1,000	2,500
Helston Community College	-	1,000
Highbury Fields School	2,000	-
Hill Park School, The Hive Centre	2,000	-
Hill View School	2,000	-
Hills Road Sixth Form College	(2,000)	5,907
Hillside High School	1,000	-
Hodgson Academy	6,615	12,236
Hove Park School	7,500	5,500
Impington Village College	230	-
Island Academy, Antigua	(254)	35
Ivybridge Community College	11,296	12,236
Jesmond Park Academy	(250)	250
John Masefield High School and Sixth Form Centre	1,000	-
Kents Hill Park Secondary	-	2,400
King Edward VI Five Ways School	-	13,220
King Edward VI Grammar School, Louth	(102)	-
King Edward VII Academy	-	1,000
Kings Norton Girls School	-	750
Kingsbridge Community College	250	1,250
Kingsbury High School	2,500	-
Kingsley Academy	-	2,000
Landau Forte College Derby	2,000	-
Lift Clacton	1,500	-
LIFT Sir Herbert Leon	2,000	-
Longridge Towers School	-	1,000
Longsands Academy	-	1,000
Lyndon School	2,000	5,000
Maiden Erlegh School	1,900	5,000
Maple Medical PRU	-	450
Marlwood School	274	-
Matthew Moss High School	-	1,000
Moor End Academy	2,000	-
Mounts Bay Academy	1,000	-
Noel-Baker Academy	1,700	5,500
Norham High School	2,000	-
North Halifax Grammar School	2,500	-
Northampton International Academy	-	2,000
Northgate High School	250	-

Secondary schools (continued)	2025 £	2024 £
Oasis Academy Sholing	1,500	-
Oasis Academy South Bank	2,745	-
Ormiston Sir Stanley Matthews Academy	-	5,000
Ormiston Victory Academy	2,000	-
Our Lady's Roman Catholic High School	2,100	1,450
Oxford Spires Academy	1,200	1,750
Paignton Academy	3,000	-
Pakefield High School	2,500	-
Parmiter's School	(750)	-
Pate's Grammar School	3,500	-
Pegasus Academy (Holly Hall School)	-	4,756
Presdales School Academy Trust	2,500	2,500
Prince William School	800	-
Queen Elizabeth's High School	1,900	2,500
Queen Katharine Academy	2,600	5,500
Redruth School	4,800	8,000
Reigate School	-	850
Richmond School	900	-
Rockwood Academy	5,000	-
Rosebery School	-	151
Roundwood Park School	2,500	-
Settlebeck School	5,500	-
Sir Robert Pattinson Academy	2,000	-
Somercotes Academy	500	-
South Bromsgrove High	403	-
St Bernadette Catholic Secondary School	250	-
St John Fisher Catholic College	(1,710)	625
St Michael's Catholic Grammar School	7,939	-
St Robert of Newminster	2,000	-
Stoke Park School	2,000	-
Stokesley School	2,500	5,500
Stratton Upper School	-	12,000
Tapton School	-	1,000
Tendring Technology College	1,000	-
The Academy at Shotton Hall	-	(3,000)
The Arnewood School	13,230	12,236
The Aspire Academy	2,450	5,500
The Chantry School	2,500	-
The Charter School East Dulwich	-	1,000
The Cotswold School	2,400	2,500

Secondary schools (continued)	2025 £	2024 £
The Jo Richardson Community School		100
The Kingfisher Church of England Academy	-	463
The King's School (Grantham)	-	1,000
The Kingsbrook School	-	2,500
The Mountbatten School	19,609	8,000
The North Halifax Grammar School	-	5,500
The Oldershaw School	-	2,500
The Priory Academy LSST (Lincoln)	2,000	3,670
The Priory School Hitchin	16,055	8,661
The School of Science and Technology (Prep Room)	2,000	-
The Spires College	2,000	-
The Thetford Academy	-	2,970
The Unicorn School	2,000	-
The University of Birmingham School	(2,000)	7,053
The Victory Academy	-	5,000
The Whitby High School	-	1,000
Torquay Boys' Grammar School	1,000	-
Tring School	1	81
Trinity High School and Sixth Form College	(41)	1,000
Trinity School	29,240	-
Varndean School	8,000	-
Vista Academy Littleport	-	1,200
Wallington High School for Girls	2,000	-
Walton High School	2,400	-
Wellington School Academy	311	100
Wellington School Timperley	(1,633)	-
West Kirby Grammar School	630	-
Wildern School	-	4,645
William Farr School	-	7,472
Workington Academy	750	-
Wyedean School and Sixth Form Centre	1,000	-
Wyvern Academy	-	2,000
Total	**313,151**	**296,518**

School trusts	2025 £	2024 £
Altus Education Partnership	5,950	-
Bath and Wells Multi Academy Trust	-	7,500
Better Futures Multi Academy Trust	-	1,300
Cabot Learning Federation	-	7,000
Community Academies Trust	-	158
Co-op Academies Trust	2,000	-
Enfield Town Schools' Partnership (ETSP)	4,000	-
Excalibur Academies Trust	-	100
Maiden Erlegh Trust	-	2,500
Meridian Trust	9,000	-
North East Learning Trust	-	1,000
North Tyneside Learning Trust	(4,000)	20,000
Reach South Multi Academy Trust	(3,065)	-
Red Balloon Educational Trust	500	-
The Kemnal Academies Trust (TKAT)	3,000	-
Total	**17,385**	**39,558**

Universities	2025	2024
Birmingham City University	(546)	-
Institute of Cosmology and Gravitation, University of Portsmouth	(20)	-
King's College London	1,562	4,830
Manchester Metropolitan University	(2,834)	18,000
Sheffield Hallam University	-	250
The Open University	-	(290)
University of Birmingham	-	250
University of Bristol	-	2,500
University of Cambridge	26,200	3,389
University of Edinburgh	980	-
University of Leeds	21,751	-
University of York	2,625	-
Total	**49,718**	**28,929**

Organisations	2025 £	2024 £
47F Grantham RAFAC	-	535
4wardFutures	-	3,640
Action Against Cancer	25,000	25,000
ARC and You	-	4,923
Artichoke Trust	5,000	-
Association for Science and Discovery Centres	-	2,500
Avondale Extra	7,000	-
Cambridge Hands-on Science	5,000	4,000
Dale Futures CIC	230,000	-
Energy Central Campus	7,200	-
Institute of Physics	-	15,000
KCL Womxn in Physics	-	375
Learning Resources Hub	250	-
Lightyear Foundation	-	5,000
Links to a Life	-	(4,900)
Our Future	76,000	-
Physics Partners	-	3,250
Real Photography Company	4,860	-
Rochdale AFC Community Trust	-	18,984
Rochdale Science Initiative C.I.C	10,000	10,000
SATRO	-	3,950
Science and Industry Museum	-	2,500
Sidmouth Science Festival	1,000	-
Soundart Radio	5,000	-
South of Tyne and Wearside Deaf Children's Society	-	3,362
Special Boat Service Association	-	15,000
Sports 4 Change CIC	-	5,000
St Mary's Ukrainian School Limited	-	4,820
Starlight Children's Foundation	25,000	25,000
The Blackett Lab Family	5,000	5,000
The Bolton Science and Technology Centre	5,000	-
The Clement James Centre	-	5,000
The de Ferrers Trust	165	-
The Living Paintings Trust	3,500	3,500
The Maternity Teacher Paternity Teacher Project	2,250	-
The Social Mobility Foundation	-	2,500
Wiltshire Music Centre	-	2,500
Total	**417,225**	**166,439**
Grants to individuals	140,348	114,535
Grand total	**1,289,603**	**915,476**

A reconciliation of the grants payable and grant commitments figures shown in these accounts is as follows:

	2025 £	2024 £
Grant commitments at 1 September 2024	506,160	459,797
Commitments made in the period net of grants released	1,289,603	915,476
Grants paid during the period	(1,160,291)	(869,113)
Total	**635,472**	**506,160**

Grant commitments at 31 August 2025 are payable as follows:

	2025 £	2024 £
Within one year (included with note 15)	580,696	418,950
After more than one year (included with note 16)	54,776	87,210
Total	**635,472**	**506,160**

9. Support costs

	Total 2025 £	Total 2024 £
Staffing costs		
Wages, salaries and medical insurance	684,100	676,179
National insurance	70,986	66,897
Pension costs	36,697	35,863
Recruitment costs	2,024	2,104
Staff training and development	20,444	16,580
Consultancy costs	9,911	20,357
Subtotal	**824,162**	**817,980**
Office costs		
Costs of moving office	21,543	-
Office rental and costs	189,770	154,806
Printing, postage and stationery	928	885
Web and digital	2,160	1,842
Publications and promotional materials	8,058	19,130
Travel expenses	19,139	11,997
Depreciation and loss on disposal of assets	9,093	8,591
Payroll and other fees	2,074	1,876
Accountancy fees	26,217	22,654
Bad debt write-off	750	-
Subtotal	**279,732**	**221,781**
Governance costs		
Legal fees	4,674	960
Audit fees	7,500	7,500
Subtotal	**12,174**	**8,460**
Total	**1,116,068**	**1,048,221**

These costs have been apportioned to the charitable activities according to the amount of staff time spent on them.

10. Net expenditure

This is stated after charging:

	2025 £	2024 £
Depreciation of tangible fixed assets: owned by the Trust	9,093	8,591
Auditor's remuneration – audit	6,250	6,250
Auditor's remuneration – non audit	-	-
Pension costs	36,697	35,863
Operating lease costs	115,983	78,786

11. Trustee remuneration and expenses and the cost of key management personnel

The average number of persons employed by the Trust during the year was as follows:

	2025	2024
Charitable activities	21	21

The numbers of employees whose emoluments during the year fell within each band of £10,000 from £60,000 upwards were as follows:

	2025	2024
In the band £60,001 - £69,999	1	-
In the band £80,001 - £89,999	1	1

As at 31 August 2025, no balance was owed by the Trust in relation to the pension scheme (2024: £nil).

No trustees received reimbursement of expenses or benefits in the year (2024: £nil).

The key management personnel of the Trust comprise the Trustees, the Chief Executive and the Director of Education. (2024: Trustees and the Chief Executive). The Trustees all give their time and expertise without any kind of remuneration or other benefit in kind (2024: £Nil). The total employment benefits, including employers NI, of key management personnel was £170,046 (2024: £97,255).

12. Tangible fixed assets

	Office equipment £	Computer equipment £	Total £
Cost			
At 1 September 2024	-	48,144	48,144
Additions	2,410	1,212	3,622
At 31 August 2025	**2,410**	**49,356**	**51,766**
Depreciation			
At 1 September 2024	-	27,228	27,228
Charge for the year	440	8,653	9,093
At 31 August 2025	**440**	**35,881**	**36,321**
Net book value			
At 31 August 2025	**1,970**	**13,475**	**15,445**
At 31 August 2024	-	20,916	20,916

13. Fixed asset investments

	Listed securities £	Cash held for investment purposes £	Total £
Market value			
At 1 September 2024	70,144,098	2,718,382	72,862,480
Disposals (proceeds £1,726,908, realised loss £371)	(1,727,279)	-	(1,727,279)
Other cash movements	-	(707,798)	(707,798)
Revaluations / currency gains	5,768,008	(46,689)	5,721,319
Investment management fees	**(558,539)**	-	(558,539)
At 31 August 2025	**73,626,288**	**1,963,895**	**75,590,183**
Historical cost	**22,265,773**	**1,963,895**	**24,229,668**

All the fixed asset investments are held in the UK.

All investments are carried at their fair value. Investment in equities and fixed interest securities are all traded in quoted public markets, primarily the London Stock Exchange. Holdings in common investment funds, unit trusts and open ended investment companies are at the bid price or the NAV of the fund. The basis of fair value for quoted investments is equivalent to the market value, using the bid price. Asset sales and purchases are recognised at the date of trade at cost (that is their transaction value).

The Trust manages the investment portfolio themselves and regularly consults with market professionals on its investment strategy. The Trust is operating an investment policy that provides for a degree of diversification of holdings within different unit trust investments. The sole purpose of the investment strategy is to fund the annual expenditure of the Trust. The Trust has invested in a number of unit trusts in order to protect the Trust's exposure to volatility in the market and seek low risk investments wherever possible. The Investment Strategy is designed to seek absolute returns on its investments and does not differentiate between income arising from Interest and dividends or capital growth on its investments in its funding decisions.

All funds have monthly liquidity and the Trust regularly liquidates part of its Fund investments at the monthly NAV value to meet the expenditure of the Trust. The Trust makes investments both in Sterling and US dollars and from time to time hedges its foreign currency exposure.

The Trust does not make use of derivatives and similar complex financial instruments as it takes the view that investments are held for their longer-term growth and annual income.

The Trust has no material investment holdings in markets subject to exchange controls or trading restrictions.

14. Debtors

	2025 £	2024 £
Amounts due in more than 1 year:		
Rent deposit	19,410	19,410
Amounts due in less than 1 year:		
Trade debtors	82,353	13,818
Rebate of external management fees	16,000	16,000
Other debtors	25,391	23,890
Prepayments and accrued income	50,523	58,026
Total	**193,677**	**131,144**

15. Creditors: amounts falling due within one year

	2025 £	2024 £
Trade creditors	39,132	52,745
Other taxation and social security	23,922	20,337
Grants payable (note 8)	580,696	418,950
Other creditors	12,335	1,971
Accruals	62,339	77,185
Total	**718,424**	**571,188**

16. Creditors: amounts falling due after more than one year

	2025 £	2024 £
Grants payable (note 8)	54,776	87,210
Total	**54,776**	**87,210**

17. Reconciliation of cash

Reconciliation of net movement in funds to net cash flow from operating activities

	2025 £	2024 £
Net income/(expenditure) for the year (as per Statement of Financial Activities)	2,711,134	8,030,776
Adjustments for:		
Gains on investments	(4,454,611)	(11,592,570)
Dividends and interest from investments	(604,657)	(570,782)
Depreciation	9,093	8,591
Profit on disposal of fixed assets	-	(550)
Increase/(decrease) in debtors	(62,533)	40,809
Increase in creditors	114,802	71,880
Net cash used in operating activities	**(2,286,772)**	**(4,011,846)**

18. Analysis of cash and cash equivalents

	2025 £	2024 £
Cash in hand	87,786	46,615
Total cash and cash equivalents	**87,786**	**46,615**

19. Analysis of changes in net debt

	At 1 September 2024 £	Cash flows £	At 31 August 2025 £
Cash at bank and in hand	46,615	41,171	87,786

20. Statement of funds

Statement of funds: current year

	Balance at 1 September 2024 £	Income £	Expenditure £	Gains/ (Losses) £	Transfers £	Balance at 31 August 2025 £
General funds						
General fund	72,387,557	1,147,836	(4,142,450)	5,720,948	-	75,113,891
Restricted funds						
Energy Internships	-	22,750	(22,750)	-	-	-
British Science Association Student Ambassadors	15,200	(8,533)	(6,667)	-	-	-
Total restricted funds	**15,200**	**14,217**	**(29,417)**	-	-	**-**
Total funds	**72,402,757**	**1,162,053**	**(4,171,867)**	**5,720,948**	**-**	**75,113,891**

Statement of funds: prior year

	Balance at 1 September 2023 £	Income £	Expenditure £	Gains/ (Losses) £	Transfers £	Balance at 31 August 2024 £
General funds						
General fund	64,359,861	762,958	(3,747,190)	11,011,928	-	72,387,557
Total unrestricted funds	**64,359,861**	**762,958**	**(3,747,190)**	**11,011,928**	**-**	**72,387,557**
Restricted funds						
Energy Internships	-	10,425	(10,425)	-	-	-
STEM Enrichment Partnership	5,453	-	(5,453)	-	-	-
British Science Association Student Ambassadors	6,667	13,333	(4,800)	-	-	15,200
Total restricted funds	**12,120**	**23,758**	**(20,678)**	-	-	**15,200**
Total funds	**64,371,981**	**786,716**	**(3,767,868)**	**11,011,928**	**-**	**72,402,757**

Purpose of funds

Energy Internships – The Energy Internships restricted fund is for donations towards the cost of the internships programme from host industries. The funding will be spent on student's bursaries.

STEM Enrichment Partnership – this fund supports science, technology, engineering and mathematics (STEM) Clubs and space activities within UK schools, improving the quality of teaching and inspiring young people to pursue a STEM-related career.

British Science Association Student Ambassadors – this fund is to support a project in the Northeast, including mentoring of younger students, running of CREST clubs and achievement of CREST awards.

21. Analysis of net assets between funds

Analysis of net assets between funds: current year

	Unrestricted £	Restricted £	Total £
Tangible fixed assets	15,445	-	15,445
Investments	75,590,183	-	75,590,183
Net current liabilities	(436,961)	-	(436,961)
Long-term liabilities	(54,776)	-	(54,776)
Total funds	**75,113,891**	**-**	**75,113,891**

Analysis of net assets between funds: prior periods

	Unrestricted £	Restricted £	Total £
Tangible fixed assets	20,916	-	20,916
Investments	72,862,480	-	72,862,480
Net current liabilities	(408,629)	15,200	(393,429)
Long-term liabilities	(87,210)	-	(87,210)
Total funds	**72,387,557**	**15,200**	**72,402,757**

22. Commitments

On 31 August 2025, the charity had the following minimum lease commitments:

Buildings	£
Rent payable within 1 year	**140,154**
Rent payable 1-2 years	**140,154**
Rent payable 2-5 years	**302,579**

23. Related party transactions

Clare Harvey (Chief Executive) and Cameron Ogden (Trustee) are directors of Dale Futures CIC. During the year, the charity granted £230,000 to fund the start-up of Dale Futures CIC. At the year end, £150,000 in grant funding is due to Dale Futures CIC and will be paid in the 2025/26 financial year.

Reference and administrative details

Trustees
Cameron Ogden (Chair)
Sir Peter Ogden
Lady Ogden
Tiffany Chawner
Edward Ogden
Tim Simmons

Chief Executive
Clare Harvey

Principal office
(from 4 November 2024)
1EdCity
EdCity Walk
London
W12 7TF

(until 3 November 2024)
The Phoenix Brewery
13 Bramley Road
London
W10 6SP

Charity registered number
1037570

Accountants
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CB1 2LA

Independent auditors
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NW6 2EG

Bankers
Lloyds Bank plc
University of Cambridge
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CB2 3HX

Coutts & Co
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The Ogden Trust

making physics matter

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Registered charity: 1037570

THE OGDEN TRUST

England & Wales - Charity number 1037570

Accounts

The Ogden Trust

making physics matter

Trustees' report and financial statements

for the year ended 31 August 2024

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Cover photograph: Pupils investigate with a Phizzi Forces enquiry. Phizzi CPD is part of our School Partnerships programme.

Back cover photograph: Guests seated for our gala dinner celebrating 25 years of The Ogden Trust.

Welcome from Chair and Chief Executive

In 2024, we celebrated 25 years of The Ogden Trust – a significant milestone for our family charitable trust. We have taken time to reflect on some of our achievements, but we continue to look ahead to what still needs to be done as we work to make broader, deeper and more sustainable changes in physics education.

It was a joy to gather with so many of our teachers and education friends for our 25th anniversary conference this year. As well as a time to celebrate, the event provided a forum to build connections and share ideas, with valuable discussions and insight that will contribute to our plans and provisions for the future.

Looking to the future, this year we have started the process of reviewing and evaluating our five-year strategy so we will be ready to move into a new phase of programme development and delivery in 2026. We have been gathering feedback from across the sector and will continue with focus groups and workshops over the coming year as we progress and consolidate our thoughts.

We remain committed to enhancing the teaching and learning of physics, and we will continue to develop our programmes to make them accessible to those who find themselves most disenfranchised from physics and the opportunities it can bring.

We are looking forward to refining and evolving our strategic objectives so we can best deliver the practical actions most needed in a challenging physics education landscape.

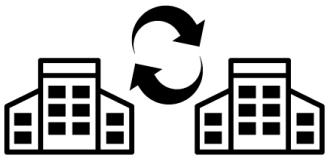
Cameron Ogden
Chair of Trustees

Clare Harvey
Chief Executive

Our strategy

The Ogden Trust is a family charitable trust which supports the teaching and learning of physics. The Trust delivers programmes primarily for schools and teachers, as well as working with universities, community groups and employers.

Increase the uptake of physics post-16 by supporting physics education and engagement for all young people (4–18), particularly those in under-represented groups



School-led partnerships to build

- supportive, collaborative teaching communities
- improvement in physics education and engagement
- enrichment opportunities
- strong environments for physics learning

Support for teachers of physics to provide

- ongoing professional development
- understanding, knowledge and teaching tools
- inspiration, skills and resources for practical physics
- a sense of appreciation and value

Physics opportunities for all through

- leadership, action and ideas
- working with universities, employers and community groups
- equitable access to physics-related enrichment
- understanding and experiencing career pathways from physics

The Trust's strategy for 2021–26 has focused on enhancing the teaching and learning of physics, and consolidates our commitment to challenging stereotypes, expanding access and opportunities, and making physics matter to more people – especially those in areas that are most in need. Over the past year, we have been reflecting on the effectiveness of our current programmes to prepare for our upcoming strategic review.

Teaching and learning

Our current programmes of teacher support and continuing professional development (CPD) are growing, with provision and opportunities for teachers throughout their careers and across the key stages. In September 2023, as part of our strategic commitment to teacher development, the Trust officially established an in-house teaching and learning team to ensure the quality of the increasing portfolio of CPD programmes across the organisation.

A new advisory panel for professional development provides further strategic direction and guidance to inform and progress our CPD portfolio. The panel comprises experts in the teaching and learning of physics in primary and secondary

Principles of practice

Design

- Intended impact of the training / CPD is clear
- Target audience is defined and informs design
- The programme design and content are underpinned by robust evidence and expertise
- Programme activities, sequencing and narrative are deliberately designed to facilitate sustained changes to practice – activities may include opportunities for application, practice, reflection, collaboration and expert challenge
- Programmes are inclusive and accessible

Evaluation

- Secure, inclusive and non-threatening environment
- Supportive yet challenging
- Meaningful and relevant to classroom practice
- Opportunities to think like a teacher, rehearse, be actively engaged, adopt metacognitive approaches and explore misconceptions
- Time for professional reflection and collaboration
- Trainers make their pedagogical reasoning clear
- Contextualised

Implementation

- Effective processes are in place to ensure the CPD programme is delivered to a high standard
- Internal and external evaluation processes are used to review impact and inform ongoing improvements to the programme
- Consideration is given to addressing broader factors that may impede the effectiveness of the programmes and broader CPD offer – participant experience; value for money; staff time

education and in teacher education and professional development. They are informed by current thinking and research and bring valuable insights from the wider education community to the Ogden teaching and learning team.

The Ogden CPD programmes are developed around research-informed principles of practice. All our CPD provision follows established guiding frameworks to ensure that the programmes meet the needs of schools and teachers, and we use trusted sources to inform our content. This year we have formalised our core principles to ensure that our training is always delivered to the same standards with a clear purpose and structure. Our principles of practice were formally adopted as Trust policy in December 2023.

The Trust was named as a source of CPD in the EEF report **Improving Primary Science** (2023) which recommends that schools 'strengthen science teaching through effective professional development' and in June 2024, we were one of just four organisations selected (from 78 applicants) to work with the Education Endowment Foundation (EEF) on their intensive Working Through Others programme.

Executive leadership panel

In September 2023, we established and launched an executive leadership panel of experienced school leaders to advise on the challenges and demands faced by the key decision makers in schools, and to advocate for the Trust across their education networks. By collaborating with school leaders in this way we hope to further develop, communicate, and effectively deliver our range of programmes in schools.

As the headteacher of a large comprehensive school for over a decade, my staff and I were expertly guided through a range of Ogden Trust programmes which enabled us to become resilient in delivering high-quality physics learning experiences. Now, as part of the Trust's executive leadership advisory panel, I can join other senior colleagues in support of the drive to help school leaders address the ongoing challenge to recruit, train and retain teachers of physics. As the range of Ogden programmes on offer develops, we can help provide senior school and trust leaders with a relevant roadmap with which to navigate the difficult educational terrain. The Trust's team of dedicated and experienced professionals remains a reassuring constant, and I feel privileged to be associated with, and able to offer advice to, an organisation that continues to make such a difference.

John Sanderson
Former Headteacher, Chipping Campden School
Chair, The Ogden Trust Executive Leadership Panel

The executive leadership panel met with the Trustees and senior management of the Trust in July 2024.

Priority actions
We will review our strategy, launching an updated document in Autumn term 2025. As part of this process, we will gather feedback from across the sector and explore how we can maximise our impact.

As part of the EEF a Working Through Others programme, we will be leading and developing a project looking at the design of professional development programmes that support physics teaching, with a view to improving teaching and learning for those facing barriers in physics.

Securing engagement with school senior leadership and departmental leads will strengthen our communications and underpin our programme development; teacher advocates will help us to grow effectively and ensure the work of the Trust resonates with school communities.

Public benefit
The Trustees have assessed the disclosures made in the Trustees' report and consider that these sufficiently detail the significant activities undertaken in order to carry out the charity's aims for the public benefit. When planning the charity's activities, the Trustees have given regard to the Charity Commission's guidance on public benefit. The Trust's programmes in physics education are beneficial as they are for the advancement of science and education. Most of the programmes are open application and are available to many schools and teachers in England, meeting the criteria that they must benefit a sufficient section of the public.

Our achievements: 2023–24

121
partnerships

817
partnership events/activities

1,157
partnership schools (925 primary, 232 secondary)

Partnership events
207,505
participants

Science Talk
221
early years practitioners

Phizzi Electricity CPD
939
teachers from 804 schools

KS3 Physics CPD
199
teachers

Early career support
105
teachers

36
Teach Physics interns at 31 schools

608
SKPT module completions

55
Coastal Energy interns at 40 companies

32
outreach officers in our network

£158,763
awarded in 51 physics education grants

25th anniversary

Education has always been at the heart of the Trust and we have evolved from providing opportunities for individuals to our current physics focus which is centred around schools and teachers.

We have supported hundreds of young people with scholarships and bursaries in our 25-year history and have gone on to support many thousands more through our university outreach, teacher support and school partnership programmes. Our physics support for teachers continues to amplify our impact as we empower and enable them to best educate the next generation.

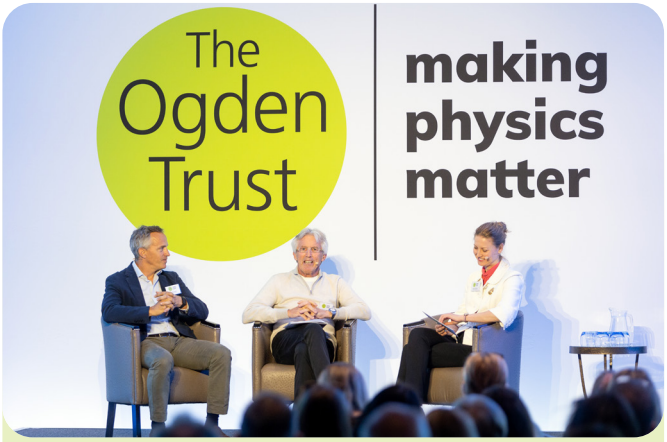
This year, we welcomed almost 300 teachers and education friends to our 25th anniversary physics forum and conference at The Belfry. We reflected on what has been achieved in the first 25 years of the Trust but also looked forward to what still needs to be done.

In our opening keynote, Evelyn Forde shared her journey into headship: "What an amazing gift it is to be a teacher. What a profound difference we can make on pupils' lives."

Celebrating 25 years of The Ogden Trust.

Delegates explore science and drama as part of our workshop series on creativity, community and family engagement.

Delegates chat and network during the conference.



Cameron and Sir Peter Ogden in conversation with fusion physicist Dr Melanie Windridge.

Guests are seated for the gala dinner celebrating 25 years of The Ogden Trust.

Delegates gather for the keynote sessions.

James de Winter shares his insight and expertise in the research strand of the workshop sessions.

Keynote speaker Professor Anu Ojha chats to delegates after sharing his insight into the importance of space science.

Sir Peter talks to delegates.

School partnerships

The Ogden School Partnerships programme works with schools from Early Years Foundation Stage (EYFS) through to the end of secondary education, working across the phases and addressing the transitions at each key stage. The overarching vision and ambition of the programme is to create sustainable improvement in physics education, making it more accessible and inspiring the next generation. Partnerships receive four years of funding with a further year of transition support to foster sustained partnership activity.

The partnership programme works with groups of local schools and with established networks through multi-academy trusts and federations. We currently support one regional partnership in Tameside which starts its fourth (and final full year) of Ogden funding in September 2024. We are continuing to evolve this place-based approach, with a view to applying the model in another area of significant need.

The partnerships collectively reported a total spend for 2023–24 of £172,258 across 121 partnerships, comprising 96 local clusters and 25 established collaborations, and including 1,219 schools. The place-based project in Tameside supported 79 schools (62 primary and 17 secondary provision) this year, meaning that more than three-quarters of schools in the Tameside Local Authority region are now actively involved in the partnership.

Targeted recruitment and assessment of applications has increased the number of schools in the partnership programme with at or above national free school meal percentage, based on the forever6 measure by Gov.uk from forty-seven per cent in 2022–23 to sixty percent in 2023–24.

We know that time can be a limiting factor in establishing and maintaining a successful partnership and a time buy-out (limited funding for half a day a week off timetable

> The culture of physics for schools in our partnership has improved drastically. This year we hosted our second family learning event as a partnership, which was really successful. The event was fully booked – over 15 feeder schools were involved, and 60 families attended, with feedback asking for more! Community engagement has also been a real strength of our partnership. Attendance at this year's community stargazing was up fifty per cent and we would love to offer a community event each term to really build connections and momentum. Our masterclasses for secondary students are being refined as we go, but they have already proved to be really useful for mapping pathways and learning about opportunities. Our partnership CPD sessions for primary and secondary have been fantastic. The resources are being used across the Trust and the CPD has instilled more confidence in physics teaching.
>
> **Natasha Peachey**
> **Science Teacher, Lyndon School Summit Partnership (2022–)**

Everton McClymont, lead co-ordinator for the Lewisham Partnership since 2020 received an Institute of Physics Teachers of Physics award for 2024. The award acknowledged his outstanding teaching style, exceptional work with supporting local primary schools, exemplary work with pupils through extracurricular activities, and promotion of under-represented groups.

to lead the partnership) is offered to co-ordinators to help give them the capacity to build effective and sustainable partnerships. Twenty-five new partnerships started in September 2023 and 96 per cent (24/25) took the time buy out (91 per cent, 2023–2024; 82 per cent 2022–2023). An additional three time buy-outs were awarded for large partnerships which were arranged into smaller clusters.

Professional development

Continuing professional partnership development (CPD) is an important component of the partnership programme with CPD opportunities available for teachers from EYFS through to KS3. In the past year, primary and secondary CPD events reached 1,544 teachers.

EYFS Science Talk
Support communication and language through understanding the world

Phizzi CPD
A four-year cycle of primary science CPD

Electricity

Forces

Light & Sound

Earth & Space

KS3 Physics CPD
Physics input, collaborative planning and reflection

Forces

Waves

Electricity

Matter

Energy

Space

Two hundred and twenty-one early years practitioners in our first-year partnerships took part in their online **Science Talk** session in 2023–24. The programme supports practical hands-on activities in early year settings, developing communication and language skills through science enquiry. Science Talk is aligned to the EYFS framework, and embeds ideas and resources to support inclusion, accessibility, and diversity; ideas for continuous provision and links to careers are designed to inspire the youngest of learners. Each activity is linked to a picture book, with a book pack provided after completion of the training.

In the academic year 2023–24, 115 Phizzi Electricity CPD sessions were held for primary schools in our partnership programme, reaching 1,159 teachers from 753 schools. This means that 84 per cent of our eligible primary partnership schools took part. As part of our regional support, a Tameside CPD conference was also held, reaching a further 74 teachers from 51 schools. Overall, on a 1-10 scale, the evaluation for Phizzi this year showed a 3.15 point increase in confidence and subject knowledge and a 2.93 point rise in their working scientifically knowledge.

> Wonderful delivery and very knowledgeable and professional presentation... There are lots of immediate changes we can make at school as an impact of this training which will improve the breadth and depth of our curriculum offer.
>
> **Phizzi Electricity CPD**

This year, our accredited trainers have been piloting our Primary Science Capital Teaching Approach (PSCTA) CPD offer with 16 partnerships; 22 teachers from 21 schools have taken part in the first year of the programme, PSCTA Developing, and

our Teaching and Learning team have been finalising the content and structure for the second year of the programme, PSCTA Securing – the extension for schools who want to implement the approach more widely across their schools or multi-academy trusts.

The PSCTA programme is available through the Ogden Trust to partnerships in their third year. It equips teachers with the skills to critically reflect on their teaching practices and to deliver a social justice approach to teaching science. Some examples include tweaking teaching to personalise and localise lessons so that they reflect the experiences of the students in their classroom and learning how to better support student voice and agency. In 2024–25, we will be piloting the second year of the programme with a cohort of schools keen to roll out this approach across their schools.

Primary schools in Year 5 partnerships can take part in Phizzi Forward which provides an opportunity for schools to consolidate and review how their Phizzi CPD resources are being used and how teaching and learning has improved. This new Phizzi component is still in pilot phase and being refined on an ongoing basis.

To ensure that progression continues from primary into secondary, partnerships can take part in KS3 Physics. This is now open to teachers and leaders of KS3 physics in the first and second year of an Ogden partnership. One hundred and seventeen schools took part in our KS3 CPD, with more than 200 teachers in year one partnerships completing sessions on the topics of forces, waves and electricity and more than 70 in year two partnerships completing sessions on matter, space and energy.

Partnership activities

Partnership funding helps to facilitate and enable physics-focused activities that support teacher development and build science capital and engagement. It was reported that a total of 817 partnership activities/events took place in 2023–24, with a total partnership spend of £172,258. These events reached 207,505 participants. The events include all partnership teacher development activities and enrichment. The main enrichment activities reported, include: ambassador schemes, extra-curricular clubs, physics fairs and inter-school competitions; trips to science centres and universities to engage students with physics in real-world contexts; and transition projects to encourage progression and build continuity in learning.

This year, following a review and teacher consultation, reporting was streamlined. To improve efficiency and the accuracy of the information provided, partnerships were asked to define their events as either enrichment or teaching and learning (CPD), with an additional category for family engagement. The Trust encourages family learning events as research has shown that parental (or primary caregiver) involvement has a positive impact on student engagement and performance in physics. Of all the reported activities, 38 per cent were categorised as enrichment, 31 per cent as family engagement and 30 per cent as teaching and learning.

Secondary schools in current or legacy partnerships are eligible to apply for funding to support students to attend trips to CERN. The funds are directed

> I can already see the children more engaged, and it has definitely enhanced the lessons.
>
> **PSCTA Securing participant**

to support those students who would otherwise be least able to participate due to their financial circumstances.

As well as giving students (and their accompanying teachers) a greater understanding of the particle physics involved in world-class research, trips to CERN showcase a range of careers connected to physics and students can use their experience to inform future education and career choices. In 2023–24, nine CERN trips took place with funding from the Trust; the funding supported approximately 93 pupil premium students to make the trip.

> The School Partnerships programme provides an amazing opportunity for schools to work together and collaborate in holding activities to inspire students in the field of physics. The funding has made this possible, especially in the current financial climate where school budgets are very tight. The students in our partnership have certainly benefitted this past year and we are very much looking forward to the next year.
>
> **Sally Chin**
> **Teacher of Science**
> **Queen Katharine Academy**
> **Peterborough Partnership (2023–)**

School culture

Building a culture of science within schools, with positive environments for physics learning and supportive and collaborative teaching communities is important to developing the physics learning landscape. The wider learning environment and investment in physics learning spaces and resources are integral parts of our partnership programme.

All second-year partnerships with more than one primary school can apply for funding to open a **Phiz Lab**, creating a primary science environment to support teachers and engage pupils. The Phiz Lab programme is part of our ongoing strategy to help raise the profile of science, enhance pupil science capital and develop working scientifically skills.

Seven Phiz Labs opened this year, and 19 new grants were awarded for schools preparing to create their lab space. The total number of active Phiz Labs (in current partnerships) is 27. Recommendations from Ogden-funded PhD research looking to understand the impact of science laboratories in English primary schools will inform the development of this programme.

Our partnership with CLEAPSS has evolved this year and we now offer funding to secondary school physics technicians to cover the cost of CLEAPSS **technician** CPD and the associated travel costs – seventeen technicians successfully applied for funding in the past year.

Our pilot programme for **primary teaching assistants** in our southwest partnership schools concluded this year; in total, 47 teaching assistants from 18 different schools in the region took part in one or more of the six webinars. The project demonstrated that professional development support for teaching assistants is invaluable and can make a positive difference to removing barriers for pupils in the classroom. However, it also highlighted the challenges of trying to provide CPD for classroom assistants and the approach will be reviewed.

Stronger together

With leadership from local Ogden-funded secondary and primary leads, the **Tameside Regional Partnership** has evolved and strengthened, and more than three-quarters of schools in the Tameside Local Authority region are now actively involved.

The regional approach has had wide-reaching impact with resources and CPD available to schools from early years through to secondary; the partnership funding has created a funnel of active, engaged learners that are reaching secondary school with a higher level of science capital, physics engagement and fewer misconceptions. The formal training days and continuing peer-support at cluster meetings has helped to consolidate teacher professional development and build enthusiasm and confidence in the classroom from EYFS through to secondary.

> By including early years from the day they walk in, we're building those strong foundations, raising the profile of science and the love of it as well.
>
> **Primary Project Lead**

Professional development

Three rounds of KS2 Phizzi CPD have taken place, plus one EYFS Science Talk session and one KS3 Physics session, involving around 250 teachers representing almost all of the 80 schools actively involved in the partnership. A conservative estimate indicates that these ideas, learning and resources will have reached more than 15,600 individual learners across the schools, roughly half of the total KS1–4 state school population in Tameside.

Teachers' knowledge and understanding of the primary science curriculum has grown thanks to Phizzi CPD, which provides subject knowledge, teaching approaches, and resources and guidance for practical enquiries. Having the right equipment, knowing how to use it, and having enough kit so a whole class can participate in practical activities has been a key part of building confidence, enthusiasm and delivery across all year groups.

> What we've got out of the Phizzi training has been absolutely remarkable. Those resources are second to none.
>
> **Teacher, Hollingworth Primary School**

Secondary teachers have noticed that more incoming students are using similar, age-appropriate terminology and seem to have fewer misconceptions. Less time is required for recapping prior learning and quicker progress can be made through the KS3 curriculum; because such a large proportion of the primary schools in Tameside have taken part in the Ogden Phizzi CPD, there is now a continuity of teaching.

> Pretty much every single primary school in the whole authority is getting the same CPD, they're doing the same experiments, with the same equipment. With almost every single child through my door in Year 7, I know what they've done. The big ideas at KS3 follow on perfectly from those in primary and if the students are covering them correctly in KS1 and 2 then the KS3 curriculum can be made more ambitious for the students.
>
> **Secondary Project Lead**

Resources

Participating schools have benefitted from significant investment in their teaching resources with the primary schools all receiving Phizzi resources and some successfully applying for additional resource funding too; one-off partnership grants have enabled secondary schools to replace broken and outdated equipment, helping schools to reinforce the primary learning by ensuring practical physics can be delivered with more hands-on investigations in smaller groups and allowing students to continue to develop their skills as active learners.

Building on the Ogden partnership momentum and enthusiasm, the Tameside Partnership has also successfully applied to external organisations for funding to buy equipment such as telescopes and binoculars for use at enrichment events and to fund an additional programme of student STEM ambassadors.

Enrichment

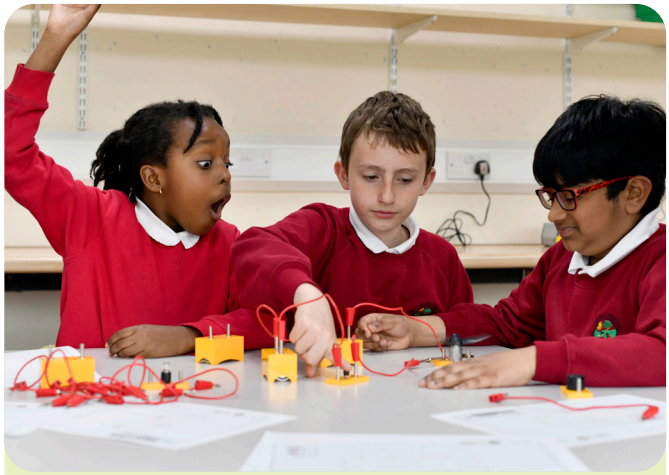
A comprehensive partnership programme of primary pupil enrichment has been developed, including STEM Space Clubs, Ogden science celebrations, Astro Camps, science ambassadors and Wow! assemblies delivered by the secondary partnership lead. Supported by Ogden bursaries, several schools have achieved the Primary Science Quality Mark accreditation, whilst others have completed the Space Education Quality Mark.

Tameside Phizzi CPD conference.

Family and community engagement events have taken place regularly, including stargazing nights, and science shows with high-profile presenters. Since 2022, these enrichment activities have reached over 14,000 children and their families. Additional funding has supported the set-up and delivery of a STEM Ambassadors scheme involving older students working with primary pupils within the partnership.

Evaluating and understanding our partnerships and their local impact is important. This case study has been produced by Dr Alison Rivett, Evaluation Consultant, who has been working with the Tameside Regional Partnership to better understand impact of the Ogden investment.

> [Partnership schools] are all saying pupils are a lot more excited, they are a lot more engaged. The Wow assemblies really stirred up the biggest excitement around the subject. [When I set up my primary school science ambassador scheme] I was expecting three applications and I had seventeen!
>
> **Teacher, Our Lady of Carmel RC Primary School**



Pupils investigate circuits with the Phizzi electricity resources.

> I was always determined to give the children from my local area the greatest chance to go on to have a career in sectors that I knew would change their lives and the community for the better – the Ogden Trust was a perfect partner to help develop our existing offer and make this vision a reality.
>
> Our students now genuinely view themselves as scientists and want others to join them in their passion for the subject, regularly sharing science research and home projects at a class and whole school level... It is deeply satisfying, knowing that we are making a tangible difference in the lives of our students and the wider community.
>
> **David Gregory**
> **Year 5 Teacher, Newsham Primary**
> **Blyth Valley Partnership (2019–)**

Legacy partnerships

Schools are encouraged to work towards a sustainable partnership, developing activities, resources and ideas that can be continued once the full partnership funding has ended. The Trust encourages and supports activities that develop students' science capital, increase careers awareness, and enhance engagement with families and the local community.

At the end of their fifth year of funding, partnerships now transition into our Teacher Network which gives them access to additional support and opportunities. They receive reduced partnership funding to help support ongoing activities and shared events. In September 2023, 23 partnerships were still active in their legacy phase.

Priority actions

Significant activity in raising the Trust profile increased partnership expression of interest applications for September 2024, to around double the expected quota. More robust and clearly defined criteria will be introduced to make the selection process more transparent and fully accountable.

Priority areas for partnerships will be established each year using the government opportunity areas cross-referenced with IDACI and ONS data for levels of deprivation. The current level of physics and STEM engagement will also be factored in. This approach will help to ensure that funding can reach the areas with the most need.

Our partnership work with large multi-academy trusts will be formally evaluated to ensure the funding and support is most effective.

Teachers get involved with the workshop sessions at the physics forum and conference.

Teacher support

Our teacher support programme is helping us build meaningful relationships with teachers throughout their careers; starting with Teach Physics internships for undergraduates who might be considering a career in teaching and continuing through to the Teacher Network which offers career-long support for all teachers of physics and primary science leads.

We are working hard to ensure teachers feel secure in their physics knowledge and valued in their role – whether they are starting their teaching journey, find themselves teaching physics when it is not their specialism or are long-standing physics teachers with years of classroom experience.

Helping teachers to improve their physics subject knowledge and confidence is a central component of our teacher support; empowering teachers to deliver engaging physics lessons helps to positively change the physics learning landscape for students and will hopefully encourage teachers to remain in the profession. Our Subject Knowledge for Physics Teaching (SKPT) CPD and our early career provision are continuing to build momentum and are reaching more teachers each term.

An online collection of resources is also freely available to support the delivery of physics in the classroom, these resources are mainly aimed at primary physics but also offer ideas and resources throughout the key stages.

Teaching internships

Thirty-six **Teach Physics** interns completed placements at 31 schools in summer 2024: 8 per cent of these participants will be starting a PCGE in 2024 and a further 11 per cent indicated that they would definitely now do teacher training when they graduated. More than 40 per cent said that following their Teach Physics experience they were now more likely to enter teaching in the future, while all of the interns said they would recommend the programme.

Undergraduate university student	Teach Physics internships	4-5 week teaching placements in schools for university students
Pre-teacher training	Subject Knowledge Foundations for Teaching Physics	Six online sessions delivered in the summer term, for teachers about to start their training
Initial teacher education	IOP Scholar mentoring	12 online sessions of mentoring and support delivered to teachers over 2 years
Early career teacher year 1-2	Teaching Core Physics	Half termly online subject knowledge CPD and mentoring sessions
Early career teacher year 2-5	Developing Physics Specialism	Bespoke one-to-one mentoring for teachers teaching physics GCSE and/or A-level

I am now in my third year of teaching post-PGCE and I am teaching at the school where I did my Teach Physics placement. Although they don't remember me, some of the Year 7s that I observed and taught during my placement I now teach in my Year 11 classes!

Although teaching is definitely not without its challenges, especially as one of a very small number of physics teachers, I can still say I am very much enjoying helping people on a daily basis. One of the highlights has been hosting my own Teach Physics intern and providing them with the opportunities that I was afforded, in addition to helping them explore their own interests and how they relate to scientific communication, education and pedagogical theory.

Kara Morris
Head of Physics
The Henrietta Barnett School

Pre-teacher training

Subject Knowledge Foundations for Teaching Physics is the next step in our support programme for aspiring teachers. This online CPD supports non-physicists who are preparing to start their science teacher training; six sessions take place in the summer and cover the foundation knowledge needed to teach physics, helping students to embed and secure their physics understanding. There was a significant uplift in interest and participation in this year's programme: more than 130 people signed up (48: 2023) with an average of 62 attending each session (26: 2023); 47 of the students attended four or more sessions (21: 2023).

I think the most useful thing will turn out to have been the general wisdom about teaching that was shared throughout the course. It's been quite inspiring. It's also useful that the course gave us good strategies for teaching each topic, and resources to use … It's been nice to feel part of a community of aspiring physics teachers …

Subject Knowledge Foundations

Initial teacher training

Following feedback on the Foundations programme, a new series of webinars will be launched to offer more support for trainee science teachers. Underpinning Principles for Teaching Physics will provide a one-hour online session each half term and 50 participants from the Subject Knowledge Foundation sessions have already signed up.

In 2024, the Trust begun working with the Institute of Physics (IOP) to support the delivery of mentoring and CPD to the **IOP scholars** – trainee physics teachers who have been awarded funded having shown that they are passionate about physics and

In May 2024, the Trust held a celebration event for the IOP scholars. The day included a keynote speech from Richard Brock, King's College London, on critical reflection and when (or if) to use stories in physics teaching.

have the potential to become inspirational teachers. One hundred and twenty-three scholarships were awarded but engagement in the online mentoring sessions plateaued at about thirty-eight per cent, although a higher number utilised the resources and presentations that were available to them. Going forward, the Trust will be responsible for delivering all of the IOP scholar mentoring, and our approach will be revised to better facilitate participation.

> I signed up for the Ogden Early Career programme for two reasons: firstly, for the subject knowledge and secondly for the confidence, and it has without doubt helped me with both... I went from a point of properly hating the subject and now just have no fear about teaching physics; I really enjoy it! I find it fascinating and interesting and that comes through when I am teaching.
>
> My mentor made me feel like I was just scooped up – he was very accessible and open and available, and made it very easy for me to tap into the programme. He was so generous with his time and with his expert knowledge and he was really patient, which was fantastic for someone like me who struggled with some of the physics concepts.
>
> **Jo Beswick**
> **Science Teacher**
> **Great Marlow School**

Early career support

Thirty-nine teachers in their first or second year of teaching signed up for our **Teaching Core Physics** programme in September 2023; a further 16 joined the programme in January 2024. Teaching Core Physics provides online coaching/mentoring sessions each half term – although feedback is positive, maintaining participation levels is always challenging. Engagement peaked at 63 per cent for session one; across the six sessions, participation levels averaged out at 39 per cent. For teachers in their second to fifth year of teaching, with a significant physics timetable, we offer **Developing Physics Specialism**. Fifty teachers signed up for the programme this year, and 68 per cent demonstrated a medium to high level of engagement (medium 2–4 sessions during the year and high 5 or more sessions).

Our annual early career festival offers our programme participants the chance to meet in person with their peers and mentors. Sixty-three early career and trainee teachers attended the two-day event in Oxford in August 2024 – enjoying inspirational professional development sessions, keynote presentations and a tour of the world-class Rutherford Appleton Laboratory.

"Very helpful tips and ideas during the sessions on how to develop my teaching in the classroom."

We continue to work with the Primary Science Teaching Trust (PSTT) to deliver the **Primary Science Enhancement Award** (PSEA) to early career teachers in primary schools in our networks. The award was developed by PSTT for student teachers to increase their experience and understanding of teaching and learning in primary science during their initial teacher training, but the

Trust is now delivering it as part of our early career support, helping teachers to consolidate and build on their science leadership potential. Although we only have a small cohort each year, the impact is positive.

> The PSEA has exposed me to a wealth of knowledge, industry best practices, and innovative approaches. This has enriched my understanding and broadened my perspective, making me more informed and adaptable in a dynamic work environment.
>
> **Samuel Taylor**
> **Early Career Primary Teacher**
> **St Mary's Catholic Primary School**

Subject knowledge

The Trust has been contracted to develop and deliver Subject Knowledge for Physics Teaching (SKPT) CPD since April 2022. The delivery is part of a national Science CPD Partnership which is funded by the Department for Education and led by STEM Learning. In 2023, the SKPT contract was extended to 31 August 2024 (and subsequently to April 2025).

With the ongoing challenges of teacher recruitment and retention, increasing numbers of teachers are having to teach KS3/4 physics without a physics specialism; SKPT is helping to support them, developing subject knowledge, pedagogy and addressing misconceptions. This blended learning CPD is an important part of our Teacher Support programme and our efforts to ensure that teachers have the knowledge, skills and confidence to deliver inspiring and engaging classroom physics.

Although recruitment to SKPT remains challenging, uptake this year has improved significantly and there have been nearly 1,000 (997) bookings made across the year. Our first residential SKPT programme was oversubscribed with additional capacity added to help meet demand. Out of the six modules available, electricity, energy and forces have attracted the most teachers. There has been overwhelmingly positive feedback for the programme and there have been 608 successful module completions this year; work pressures and release time from school are significant barriers to attendance and completion.

> I have loved doing SKPT – learning new practicals and new demonstrations that I can use to help improve students' understanding. I am more confident in identifying and tackling any misconceptions and my knowledge has improved so I can relate the subject to pupils' lives and interests helping to better engage them in lessons. In our recent pupil voice, the pupils said that they are loving physics and applying it to their lives. I now absolutely see myself as a physics teacher. I am loving teaching physics this year and the pupils are loving my enthusiasm for the subject.
>
> **Myron Clarke**
> **Teacher of Science**
> **High Tunstall College of Science**

SKPT

Teacher fellowships

Senior teacher fellowships (STF) are awarded to teachers who have demonstrated exceptional commitment to physics education and are designed to give more experienced teachers professional development opportunities outside of the classroom, that will reinvigorate their teaching and hopefully encourage them to stay in the profession.

As part of the fellowship, teachers plan and implement a physics education project. The teachers are offered guidance and mentoring throughout their fellowship and become part of a supportive community of practice. Fifteen teacher fellowship awards were made for 2023–24.

> Being a senior fellow has given me the time and flexibility to explore truly innovative and exciting projects. We rarely get this time as teachers and the opportunity for me to work internationally with the team at PhET is a highlight of my career so far. The balance of stellar professional development, independence, and autonomy, is a true highlight of the fellowship.
>
> **Jed Marshall**
> **Physics Teacher**
> **Alexandra Park School**

More than 60 workshops have been delivered as a result of this year's STF projects; 16 activity packs have been produced and downloaded more than 700 times. Our STF projects have reached more than 2,130 students and a further 50 families over the course of this past year; more than 400 teachers and trainee teachers have taken part in STF project-related activities and events.

Teacher network

Our teacher network currently has more than 1,450 members (including current partnership teachers) and offers regular professional development opportunities to people who have previously been involved in Ogden programmes.

In December 2023, 15 secondary physics teachers took part in a fully funded visit to the Culham Centre for Fusion Energy and we subsequently collaborated with UKAEA to run the first fusion teacher conference in Summer 2024. Both events enabled secondary teachers to gain insight into the groundbreaking field of fusion physics and how it can be brought to the classroom and the curriculum. The fusion conference was open to all teachers associated with Culham; 29 teachers took part in the event of which 18 were from our teacher network.

Fusion conference

> The fusion teacher conference was one of the best CPD events I've attended. It provided fascinating insights into fusion energy through expert presentations from UKAEA and industry professionals, paired with engaging classroom activities from The Ogden Trust. Since attending, I've gained confidence in teaching A-level and KS4 nuclear physics, using the UKAEA-provided equipment to enrich lessons and connect studies to real-world applications and career paths. This conference has greatly enhanced both my teaching and my students' engagement with the subject.
>
> **Diarmuid McGowan**
> **Head of Physics, St Mary's Catholic School**

This year, we held our first series of six teacher network webinars targeted at secondary and primary teachers. Sessions were held after school in an effort to improve attendance and accessibility with topics aimed at enhancing teaching and learning in physics. Overall, 59 people (31 primary and 28 secondary) attended across the six sessions, which were all very well-received; next year we plan to host more webinars and hope to reach a wider audience.

Teachers in the network can apply for a limited number of education research opportunities to help them build knowledge for themselves and the wider education sector. The Trust is currently funding two teachers to complete an education master's with a further two awards made for 2024.

> I love my job as a physics teacher, and I'm glad that the Ogden Trust teacher network has been supportive through this time. I have found the online webinars for professional development to be incredibly helpful, especially the webinar about PhET simulations which I have been able to implement into my own teaching.
>
> **Cameron Gilmour**
> **Head of Physics, The Boswells School**
> **(Teach Physics intern 2021)**

Resources

Ogden resources are freely available online and include a range of primary and secondary resources for physics teaching and learning, as well as guides to encourage and develop extra-curricular physics activities. Our collection of resources is being updated to better reflect the curriculum requirements, substantive and disciplinary knowledge and the latest education research. Collectively, our resources have been downloaded more than 10,000 times over the past 12 months (September 2023–August 2024). This is a significant uplift on last year (where downloads were estimated to be in the region of 8,000) and can be attributed to increased social media activity to promote them. The top five resource downloads are all from our working scientifically series which is consistently popular.

Priority actions

To ensure teachers have continued access to free subject specific CPD programmes we are working to establish subject knowledge provision for out of field teachers as a mainstay of our teacher support offering, building on the momentum we have been able to create since we first started our SKPT delivery.

We will continue to grow and evolve our teacher support programmes so that a larger proportion of early career teachers can access the subject specific physics support they need to secure and enhance their teaching journey.

Opportunities for all

The Trust is working to ensure that access to physics-related enrichment and future pathways are open to all regardless of socio-economic constraints or other barriers. We are supporting opportunities for universities and employers to engage with young people, taking physics beyond the classroom and giving an insight into the real-world application of science.

University engagement

Our outreach officer network is the central thread of our university engagement work. It is open to all physics outreach practitioners at universities in Great Britain. We currently have 32 members enrolled in the network, which meets regularly throughout the year; it provides access to training and funding opportunities, and shares practice and ideas. Leadership of the network is being devolved to a membership committee so that priorities can be determined and managed by the group.

The annual Ogden outreach meeting brings our network together to reflect on the challenges and achievements of the past year, and to share ideas and best practice. This year, the meeting dovetailed with our Ogden outreach awards. Four main awards were presented for 2024 in recognition of outstanding contributions to physics outreach.

The Moon Palace
© Charles Emerson, Heather Peak and Ivan Morison

Sustained Contribution
Professor Helen Mason, University of Cambridge

Partnering with Student Ambassadors
Safe Space (University of York and the Lightyear Foundation)

Partnering with Schools
Stargoal (Catchgate Primary School, Education Durham, Durham women's football team and Durham University)

Engaging with Communities
My Place, My Science (African Families in the UK and Oxford University)

A further 16 awards were made to individual undergraduate and postgraduate student ambassadors.

This year the Trust also announced a collaborative funding award for Moon Palace – a mobile observatory that merges art and science, and engages diverse audiences through celestial exploration, innovative outreach, and creative collisions. The programme, which is led by the University of Leeds, also empowers student ambassadors with interdisciplinary skills, fostering their growth as communicators and leaders. The Moon Palace project will be developing training resources looking at how to incorporate arts projects and methodologies into physics outreach, allowing the valuable lessons learnt from their project to be shared and replicated more widely in the future.

This year, the Trust has been part of the planning and delivery team for the Interact Symposium, which is run every two years and led by a consortium of the Science and Technology Facilities Council (STFC), the Institute of Physics, The Ogden Trust, the Royal Astronomical Society and SEPnet. Interact 2024 was attended by 180 people involved in public engagement from across the physical sciences in the UK. Twenty-six sessions were held throughout the day with more than 60 speakers contributing.

Recruitment for a third cohort of the Ogden/STFC funded programme in **Leadership for Outreach and Public Engagement** has also taken place this summer, with 16 people accepted onto the programme from a total of 28 applicants. The course continues to support our efforts to build a broader more sustainable engagement with university physics departments and physics outreach professionals, developing a collaborative and long-term commitment to projects that will have a more profound and lasting impact.

A report funded by The Ogden Trust and the STFC reviewing public engagement with physics and engineering in REF2021 has also been completed over the past year (reporting in September 2024)[i]. Almost half (77/169 or 46 per cent) of the physics impact case studies produced for REF 2021 mention public engagement activity although the role of evaluation is an area that could be developed, particularly with the increasing emphasis on rigour in REF 2029.

Employer engagement

Engaging with employers can provide a tangible connection between physics and future careers, highlighting the many and varied pathways that can emerge from studying physics and STEM subjects.

The Coastal Energy internship programme is one way that the Trust is engaging with employers and working in priority areas of deprivation – many coastal areas in England are facing socio-economic challenges. The internships provide bursaries for Year 12 and Year 13 students to undertake a 20-day summer placement with a local company in the energy sector. Internships provide a vital springboard into future possibilities, broadening access to career insights, providing meaningful work experience and engaging students in crucial conversations about renewable energy and the environment. The internships are run in partnership with local education providers in East Anglia, Barrow, Blyth and Ulverston, who each have a Coastal Energy College Champion. The internships are only available to students in partner colleges.

This year, 55 (48: 2023) students were placed at 40 (30: 2023) host organisations. Feedback indicates that the programme is having a positive impact on the sector and that the companies involved can see its value: each of the host companies agreed or strongly agreed that they would encourage other companies to take part in the Coastal Energy programme. Interns gain work-place experience with meaningful project work and over 80 per cent of this year's interns say that the placement helped them to improve their communication skills.

Priority actions

We want to increase member participation in the outreach officer network, embedding the devolved membership-led model so that meetings, content and support can be evolved to best meet the needs of the network.

We will be exploring opportunities to make the internship programmes more efficient and sustainable in our current partner regions.

> The past 20 days have been both challenging and rewarding. Our primary task was to create engaging activities to promote careers in schools, and it's been fantastic to see our project evolve into something that could truly make a difference for students in the region. Adapting and refining our plans along the way has been a valuable learning experience, pushing us to think creatively and work collaboratively.
>
> **2024 Coastal Energy intern**

Grants

In line with our strategy to increase the uptake of physics at post-16, particularly for under-represented groups, the Trust awards funding to projects outside of our core schemes which are aimed at improving the teaching and learning of physics.

There are three physics education grant application windows throughout the year for small grants to support the teaching and learning of physics; all applications and reports are completed online. The grants are wide-ranging and support new ideas as well as established good practice. Since September 2023, 51 grants have been awarded to the value of £158,763.

Although these grants are awarded for standalone projects, we encourage schools to use a funding award as a stepping-stone into a longer-term relationship with the Trust, sometimes as a gateway to the teacher network or to forming a school partnership.

In 2024, the Trust was the lead sponsor of the Rochdale Science Extravaganza, which reached more than 3,000 people. The event offered a spectacular showcase into the wonders of the universe and the crucial role of science and creativity in our everyday lives. It brought together education, research, business, community and faith groups in the planning and delivery of the festival, which reinforced the message that STEM can be for everyone.

> We are a school in a deprived area of Norfolk and our science budget does not extend to buying all the equipment the students need to successfully carry out practical work. With our grant we were able to buy more powerpacks which means more students can complete practicals at the same time, and a new ripple tank which has already been used at both GCSE and A-level and has greatly improved the students' understanding of waves.
>
> Other new equipment made possible by the grant has greatly improved the range of activities our A-level students can carry out and we have seen our highest uptake of A-level physics students this year.
>
> **Dr Lindsay Barrett**
> **Second in Science**
> **The Thetford Academy**

Further to our physics education grants, an additional eight grants were made to organisations supporting other charitable interests of the Trustees; these grants are not open for applications and are solicited directly.

Making Physics Matter

Research and communications

We are continuing our efforts to raise our profile in the physics education arena, although recent brand tracker surveys (Teacher Tapp) taken over the past 12 months suggest the Trust is still relatively unknown in the sector compared to other providers. However, programme applications and participation have increased which suggests that we are broadening our reach and impact.

This year, as part of our activities to mark the 25th anniversary of the Trust, we commissioned a small research project with current undergraduates to gather insight into their experiences of physics teaching at school. We wanted to understand how teachers influence student journeys into higher education and the subjects they chose to study, and why young people choose not to study physics after the age of 16.

Results summary

- Physics was rated as one of the best taught subjects at A-level, and one of those rated most likely to contribute to good career and academic prospects.
- 42 per cent of those who chose not to continuephysics at A-level cited a lack of enjoyment at GCSE as the main reason, followed by 24 per cent who said it was poor teaching.

The survey results offer a very specific snapshot of current undergraduates, and the results have been published in our **Insights and experiences of school physics** report[ii]. The findings resonate with our commitment to teacher support and professional development: if students are to continue studying physics beyond GCSE, teachers – especially the growing number having to teach the subject when it is not their main specialism – must be given up-to-date resources and the professional support that will allow them to deliver lessons that engage and inspire learners.

As school budget constraints and teacher shortages continue to impact education, we are working proactively to engage with school leaders so that they are well-informed about The Ogden Trust and the free programmes of support that we offer. We are focusing our participation – as presenters or exhibitors – at national education conferences that are best placed to help us reach our priority areas and target audiences; this year we attended 14 conferences.

This year we have expanded our social media presence to build our profile on two of the emerging channels, BlueSky and Threads, and our communities on these new spaces are slowly building. Despite continuing uncertainty over X, we are still gathering some new followers (who seem to be people and not bots); our numbers reached 5,700 this year and people are still active on the channel[iii]. Facebook numbers have stabilised in the region of 1,700. Over the past year, our followers on LinkedIn have more than doubled and at the end of August 2024 had reached 1,325.

Traffic to our website has increased; in the second half of the year (March–August) the number of users, sessions and page views had all increased on the same period in 2023.

Period	Users	Sessions	Page views
2023	14,737	22,967	53,435
2024	15,780	24,960	56,756

Priority actions

We will work to build our profile in education media and at events so than more teachers can benefit from accessing our programmes and resources.

We will continue to develop our use of social media to feed into a broader digital communications strategy and explore the effectiveness of new channels.

Governance, structure and management

Constitution

The organisation was registered as an unincorporated charity on 25 March 1994. The charity is governed by a trust deed, and a supplemental deed dated 18 May 1998. It is registered with the Charity Commission, Charity Registration Number 1037570.

The charitable objects of the Trust (updated in 2022) allow the Trustees to advance general charitable purposes, in particular, but not limited to:

(i) the advancement of education;
(ii) the advancement of science; and
(iii) the prevention or relief of poverty and the relief of those in need, by reason of youth, age, ill-health, disability, financial hardship or other disadvantage.

Appointment of Trustees

The Trustees are appointed by the existing Trustees. At any one time, there must be a minimum of three Trustees. There were no changes to the Trustee board this year.

Induction and training of Trustees

When new Trustees are appointed, there are procedures in place to ensure that they clearly understand their duties and responsibilities and can assess their own training needs. Most Trustees are long-standing and are able to support the development of new members of the Board.

The Trustees are briefed bi-annually by the Chief Executive about their responsibilities and liabilities as Trustees.

Organisational structure and decision making

The Trustees are responsible for the policies, activities and assets of the charity. They meet four times a year to review developments and activities, and to make any important decisions. When necessary, the Trustees seek advice and support from the charity's professional advisers, including investment managers and accountants. Expert advisers in physics education may also be consulted where appropriate. All trustees give their time voluntarily and receive no benefits from the charity. Any expenses reclaimed from the charity are set out in note 12 to the accounts.

The day-to-day management of the charity's activities, and the implementation of policies, is delegated to Clare Harvey, Chief Executive, in line with an agreed scheme of delegation. At their meetings, the Trustees will review the investment performance, strategic changes to programmes, the impact of programme activities and grant proposals. The Chief Executive's pay is determined by the Trustees who consider a range of factors.

Diversity and inclusion

Diversity and inclusion are core values of our organisation, and we are committed to providing an inclusive workplace for staff and consultants. Our equity, diversity and inclusion strategy was developed with guidance from our advisory panel who continue to help us monitor development and delivery of our approach. Time is prioritised across our teams to reinforce learning, awareness and understanding in this area.

A staff wellbeing committee continues to inform office policy and procedures and a trained mental health first aider is available within the team; staff can also access an employee assistance programme which provides a range of free, confidential support for any issues staff may be experiencing at work or in their personal life.

Financial summary

Key financial performance indicators

The Trust makes a significant financial investment in direct programme support each year, primarily professional development activities for teachers, with a number of programmes including funding. In addition, smaller grants (typically less than £5,000) are awarded each year outside of our programmes to support schools, colleges and other organisations who wish to carry out projects or activities that support the teaching and learning of physics. Total charitable expenditure in 2023–24 was £3,767,868, a moderate increase from £3,266,970 in 2023-24. Of this expenditure, £2,762,652 was spent directly on physics education activities. Spend has increased across all of the programme areas with the exception of SKPT; the School Partnerships programme still constitutes the biggest single area of spend.

The investment gain in this period has maintained the portfolio within the higher end of our reserves target, in line with investment objectives. However, the Trustees are always aware that there are external factors which could affect the achievements of their objectives as all of the Charity's assets are made up of investments and cash, the result of which are dependent on the general performance of the UK and overseas stock markets. In order to minimise this risk, the Trustees set prudent investment

Expenditure by programme

September 2023 – August 2024

- School Partnerships
- Teacher Support
- Ogden Outreach Officers
- Teach Physics internships
- Grants and bursaries
- Other physics activities
- Subject Knowledge for Physics Teaching

Expenditure by type

September 2023 – August 2024

- Direct costs
- Grant funding
- Support and governance

policies and place reliance on the investment managers to monitor and advise on necessary investment changes and suitable asset allocation.

Investment policy and performance

There are no restrictions on the charity's power to invest. The investment strategy is set by the Trustees and takes into account income requirements, the risk profile and the investment manager's view of the market prospects in the medium term. The overall investment policy is to maximise total return with a target of 5 per cent; and this year we have seen good growth on investment.

Reserves policy

As explained above, the charity carries out a range of activities, some of which comprise projects requiring significant ongoing financial commitment and investment. The Trustees have examined the requirements for free reserves, ie, those unrestricted funds not designated for specific purposes or otherwise committed. As the majority of the investments are liquid, the majority of the Trust's funds are free reserves.

The Trustees' policy is to manage financial resources in such a way as to provide in full for the grant and bursary commitments made, and to ensure similar levels of commitment in the future. The free reserves must therefore be sufficient to generate sufficient return to allow this to happen. In the current financial climate, the Trustees estimate this amount to be £50,000,000–£70,000,000.

The balance sheet shows free reserves (unrestricted funds less tangible fixed assets) of £72,366,641 (2023: £64,335,730), which exceeds the target parameters and therefore provides room for growth in our programmes.

Risk management

In line with the requirement for Trustees to undertake a risk assessment exercise and report on the same in their annual report, the Trustees have looked at the risks The Ogden Trust currently faces and have reviewed the measures in place, or needing to be put in place, to deal with them. The Trustees have identified seven main areas where risks may occur, and a comprehensive risk register has been produced.

Having assessed the major risks to which the charity is exposed, in particular those relating to its investments and its finances, the Trustees believe that by monitoring reserve levels, ensuring controls exist over key financial systems, and by examining the grant management processes carried out by the charity they have established effective systems to mitigate those risks.

Threats to cyber security are an ongoing consideration and remain on our register of risk, with measures in place to mitigate against loss of funds or data caused by a cyber security breach.

Risk	Mitigation
Poor investment returns	These are monitored in quarterly Trustees' meetings and if poor returns are expected grant making can be reduced or halted.
Cyber security breach	The Trust has achieved Cyber Essentials Plus accreditation, meaning systems are in place to help counter any cyber breaches or fraud; in addition, the Trust has cyber security insurance in place.
Programme participants behaving in an inappropriate fashion	Programme participants are in contact with the Trust throughout the duration of their programme and such behaviour can be addressed when required.
Grant holders misspending funds	Grant holders are required to account for their spending in their reporting and misspent funds can be reclaimed.
Safeguarding	The Trust has a safeguarding children policy as well as staff behaviour policies. All staff have undertaken child protection and safeguarding training.
Sickness affecting staff	Processes and procedures are now in place for a hybrid working model. When staff are in the office, it is well spaced, ventilated and regularly cleaned. Staff are encouraged to work from home if appropriate to prevent the spread of illnesses.
Data protection	The Trust has a data protection policy and a retention and disposal policy. The Chief Executive is the Data Protection Officer. All staff have had training on data protection.

[i] www.publicengagement.ac.uk/resources/reports-and-reviews/reviewing-public-engagement-physics-and-engineering-ref2021

[ii] www.ogdentrust.com/about-us/publications-and-research/insights-and-experiences-of-school-physics/

[iii] A report from Teacher Tapp this year revealed that although there has been a significant decline in the number of teachers using X in relation to their work, more than a third of secondary teachers were still on X when the report data was gathered. https://teachertapp.co.uk/app/uploads/2024/07/7-Types-Of-Teachers-On-Social Media-2024.pdf

Trustees' responsibility statement

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

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity 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 judgments and accounting estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation;
- 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.

The Trustees are responsible for keeping proper accounting records that are sufficient to show and explain the charity's transactions and disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity 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 charity's auditor is unaware;
- they 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 charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

This report was approved by the Trustees, on 17 February 2025 and signed on their behalf by:

Cameron Ogden

Independent auditor's report to the Trustees of The Ogden Trust

Opinion

We have audited the financial statements of The Ogden Trust (the charity) for the year ended 31 August 2024 which comprise the statement of financial activities, balance sheet, statement of cash flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- Give a true and fair view of the state of the charity's affairs as at 31 August 2024 and of its incoming resources and application of resources for the year then ended.
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice.
- Have been prepared in accordance with the requirements of the Charities Act 2011.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charity's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees' annual report other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit, or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charity and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' annual report.

We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 requires us to report to you if, in our opinion:

- sufficient accounting records have not been kept;
- the financial statements are not in agreement with the accounting records and returns; or
- we have not obtained all the information and explanations necessary for the purposes of our audit.

Responsibilities of trustees

As explained more fully in the statement of trustees' responsibilities set out in the trustees' annual report, the trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charity or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic deci-sions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud are set out below.

In identifying and assessing risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, our procedures included the following:

- We enquired of management, which included obtaining and reviewing supporting documentation, concerning the charity's policies and procedures relating to:
  - Identifying, evaluating, and complying with laws and regulations and whether they were aware of any instances of non-compliance;

  - Detecting and responding to the risks of fraud and whether they have knowledge of any actual, suspected, or alleged fraud;
  - The internal controls established to mitigate risks related to fraud or non-compliance with laws and regulations.
- We inspected the minutes of meetings of those charged with governance.
- We reviewed the financial statement disclosures and tested these to supporting documentation to assess compliance with applicable laws and regulations.
- We performed analytical procedures to identify any unusual or unexpected relationships that may indicate risks of material misstatement due to fraud.
- In addressing the risk of fraud through management override of controls, we tested the ap-propriateness of journal entries and other adjustments, assessed whether the judgements made in making accounting estimates are indicative of a potential bias and tested significant transactions that are unusual or those outside the normal course of business.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the Charity's trustees, as a body, in accordance with section 144 of the Charities Act 2011 and the regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the Charity's trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charity's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Goldwins

Goldwins Limited
Chartered Accountants
Statutory Auditor
75 Maygrove Road
West Hampstead
London NW6 2EG

Date: 17 February 2025

Goldwins Limited is eligible for appointment as auditor of the charity by virtue of its eligibility for appointment as auditor of a company under section 1212 of the Companies Act 2006

Statement of financial activities for the year ended 31 August 2024

	Note	Unrestricted funds 2024 £	Restricted funds 2024 £	Total funds 2024 £	Total funds 2023 £
Income from:					
Donations	2	-	23,758	23,758	58,651
Charitable activities	3	191,599	-	191,599	212,588
Investments	4	570,782	-	570,782	525,189
Other income	5	577	-	577	-
Total income		**762,958**	**23,758**	**786,716**	**796,428**
Expenditure on:					
Raising funds	6	374,571	-	374,571	372,709
Charitable activities	7	3,372,619	20,678	3,393,297	2,894,261
Total expenditure		**3,747,190**	**20,678**	**3,767,868**	**3,266,970**
Net (expenditure)/ income before investment gains		**(2,984,232)**	**3,080**	**(2,981,152)**	**(2,470,542)**
Net gains on investments	13	11,011,928	-	11,011,928	1,541,074
Net income/ (expenditure)		**8,027,696**	**3,080**	**8,030,776**	**(929,468)**
Net movement in funds		**8,027,696**	**3,080**	**8,030,776**	**(929,468)**
Reconciliation of funds:					
Total funds brought forward		64,359,861	12,120	64,371,981	65,301,449
Total funds carried forward	20	72,387,557	15,200	72,402,757	64,371,981

The notes on pages 36 to 60 form part of these financial statements.

Balance sheet as at 31 August 2024

	Note	31 August 2024 £	31 August 2023 £
Fixed assets			
Tangible assets	12	20,916	24,131
Investments	13	72,862,480	64,567,182
Total fixed assets		**72,883,396**	**64,591,313**
Current assets			
Debtors	14	131,144	171,953
Cash at bank and in hand		46,615	195,233
		177,759	**367,186**
Creditors: amounts falling due within one year	15	(571,188)	(478,313)
Net current liabilities		**(393,429)**	**(111,127)**
Total assets less current liabilities		**72,489,967**	**64,480,186**
Creditors: amounts falling due after more than one year	16	(87,210)	(108,205)
Net assets		**72,402,757**	**64,371,981**
Charity funds			
Unrestricted funds	20	**72,387,557**	**64,359,861**
Restricted funds	20	**15,200**	**12,120**
Total funds		**72,402,757**	**64,371,981**

The notes on pages 36 to 60 form part of these financial statements.

The financial statements were approved by the Trustees on 17 February 2025 and signed on their behalf, by:

Cameron Ogden
Trustee

Statement of cash flows for the year ended 31 August 2024

	Note	2024 £	2023 £
Cash flows from operating activities			
Net cash used in operating activities	17	**(4,011,846)**	**(3,397,771)**
Cash flows from investing activities			
Dividends, interests and rents from investments		570,782	525,189
Purchase of property, plant and equipment		(5,376)	(19,481)
Proceeds from sale of investments		3,297,272	3,198,423
Proceeds from sale of property, plant and equipment		550	-
Purchase of investments		-	(177,285)
Net cash provided by investing activities		**3,863,228**	**3,526,846**
Change in cash and cash equivalents in the year		**(148,618)**	**129,075**
Cash and cash equivalents at the beginning of the year		195,233	66,158
Cash and cash equivalents at the end of the year		**46,615**	**195,233**

The notes on pages 36 to 60 form part of these financial statements.

Notes to the financial statements for the year ended 31 August 2024

1. Accounting policies

1.1 Basis of preparation of financial statements

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant notes to these accounts. The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (second edition – October 2019) (Charities SORP (FRS 102)) the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The financial statements have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair view'. This departure has involved following Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 rather than the Accounting and Reporting by Charities: Statement of Recommended Practice from 1 April 2005 which has since been withdrawn.

No significant estimates or judgements have been made by management in preparing these financial statements.

The Ogden Trust constitutes a public benefit entity as defined by FRS 102.

1.2 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the Trust and which have not been designated for other purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the Trust for particular purposes. The costs of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

1.3 Going concern

The Trustees have reviewed the financial position of the Trust and have a reasonable expectation that the Trust has adequate resources to continue in operational existence for the foreseeable future. Accordingly, the financial statements continue to be prepared on the going concern basis.

1.4 Income

All income is recognised once the Trust has entitlement to the income, it is probable that the income will be received and the amount of income receivable can be measured reliably.

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the Trust; this is normally upon notification of the interest paid or payable by the Bank.

Dividends are recognised once the dividend has been declared and notification has been received of the dividend due.

Income tax recoverable in relation to investment income is recognised at the time the investment income is receivable.

Donation income is recognised when received.

Other income is recognised in the period in which it is receivable and to the extent the goods have been provided or on completion of the service.

1.5 Expenditure

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

Support costs, including governance costs are those costs incurred directly in support of expenditure on the objects of the Trust and include management carried out at the principal office. Governance costs are those incurred in connection with administration of the Trust and compliance with constitutional and statutory requirements. Support and governance costs have been allocated to activities based on staff time spent.

Grants payable are charged in the year when the offer is made except in those cases where the offer is conditional, such grants being recognised as expenditure when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the period end are noted as a commitment, but not accrued as expenditure.

Expenditure on raising funds represents the fees paid to investment managers in connection with the management of the Trust's listed investments.

All resources expended are inclusive of irrecoverable VAT.

1.6 Financial instruments

The Trust only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

1.7 Tangible fixed assets and depreciation

Tangible fixed assets are carried at cost, net of depreciation and any provision for impairment. Depreciation is provided at rates calculated to write off the cost of fixed assets, less their estimated residual value, over their expected useful lives on the following bases:

Fixtures & fittings	20% per annum based on cost
Computer equipment	25% per annum based on cost

1.8 Investments

Fixed asset investments are a form of financial instrument and are initially recognised at their transaction cost and subsequently measured at fair value at the Balance Sheet date, unless fair value cannot be measured reliably in which case it is measured at cost less impairment.

All gains and losses are taken to the Statement of Financial Activities as they arise. Realised gains and losses on investments are calculated as the difference between sales proceeds and their opening carrying value or their purchase value if acquired subsequent to the first day of the financial year. Unrealised gains and losses are calculated as the difference between the fair value at the year end and their carrying value.

Investment gains and losses, whether realised or unrealised, are combined and shown in the heading 'Gains/(losses) on investments' in the Statement of Financial Activities.

1.9 Foreign currencies
Monetary assets and liabilities denominated in foreign currencies are translated into sterling at rates of exchange ruling at the balance sheet date.

Transactions in foreign currencies are translated into sterling at the relevant monthly average exchange rate.

Exchange gains and losses are recognised in the Statement of Financial Activities.

Foreign exchange gains and losses arising on investments are disclosed within gains/(losses) on revaluations of fixed assets on the Statement of Financial Activities.

1.10 Debtors
Trade and other debtors are recognised at the settlement amount 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 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.

1.12 Creditors and provisions
Liabilities are recognised when there is an obligation at the Balance Sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably. Liabilities are recognised at the amount that the Trust anticipates it will pay to settle the debt or the amount it has received as advanced payments for the goods or services it must provide. Provisions are measured at the best estimate of the amounts required to settle the obligation. Where the effect of the time value of money is material, the provision is based on the present value of those amounts, discounted at the pre tax discount rate that reflects the risks specific to the liability. The unwinding of the discount is recognised within interest payable and similar charges.

1.13 Pensions
The Trust operates a defined contribution pension scheme, and the pension charge represents the amounts payable by the Trust to the fund in respect of the year.

1.14 Critical accounting estimates and areas of judgement
Preparation of the financial statements requires management to make significant judgements and estimates. The key areas in the financial statements where these judgements and estimates have been made are as follows

- depreciation on fixed assets;
- fair value of investments, and;
- grants accrued payable in more than one year.

2. Income from donations

	Unrestricted funds 2024 £	Restricted funds 2024 £	Total funds 2024 £	Total funds 2023 £
Donations	-	10,425	**10,425**	41,568
Grants	-	13,333	**13,333**	17,083
	-	**23,758**	**23,758**	**58,651**

In 2023, £720 was unrestricted and £57,931 was restricted.

3. Income from charitable activities

	Unrestricted funds 2024 £	Restricted funds 2024 £	Total funds 2024 £	Total funds 2023 £
Science CPD programme (STEM Learning Ltd)	182,070	-	**182,070**	**212,588**
IOP scholarships support	9,529	-	**9,529**	-
	191,599	-	**191,599**	**212,588**

4. Investment income

	Unrestricted funds 2024 £	Restricted funds 2024 £	Total funds 2024 £	Total funds 2023 £
Income from listed investments	555,921	-	555,921	519,878
Interest on bank fixed deposits	14,861	-	14,861	5,311
	570,782	**-**	**570,782**	**525,189**

In 2023, all investment income was unrestricted.

5. Other income

	Unrestricted funds 2024 £	Restricted funds 2024 £	Total funds 2024 £	Total funds 2023 £
Sale of furniture and IT equipment	550	**-**	550	-
Cashback	27	**-**	27	-
	577	-	**577**	-

6. Investment management costs

	Unrestricted funds 2024 £	Total funds 2024 £	Total funds 2023 £
Investment manager's fees	562,488	562,488	553,859
Investment management fee rebate	(187,917)	(187,917)	(181,150)
	374,571	**374,571**	**372,709**

The rebate was negotiated by the trustees and is equivalent to a third of their 1.5% management fee charged to the Omnia Fund L.P. for dealing with the Fund's affairs. In 2023 all expenditure on investment management costs was unrestricted.

7. Analysis of expenditure

Analysis of expenditure: current year

	Direct costs 2024 £	Grant funding of activities (note 8) 2024 £	Support & governance costs (note 9) 2024 £	Total 2024 £	Total 2023 £
School Partnerships	764,904	441,029	586,688	1,792,621	1,592,331
Teacher Support	124,985	138,869	203,774	467,628	413,378
Ogden Outreach Officers	57,433	19,924	99,791	177,148	124,145
Teach Physics internships	2,371	54,290	33,229	89,890	79,001
Grants	14,845	153,191	16,667	184,703	155,720
Bursaries and scholarships	-	-	-	-	(30,389)
Other physics activities	286,548	43,138	99,791	429,477	199,560
Subject Knowledge for Physics Teaching (SKPT)	176,264	-	-	176,264	228,906
	1,427,350	**850,441**	**1,039,940**	**3,317,731**	**2,762,652**
Other charitable purposes	2,250	65,035	8,281	75,566	131,609
All charitable activities	**1,429,600**	**915,476**	**1,048,221**	**3,393,297**	**2,894,261**
2023	1,263,871	824,297	806,093	2,894,261	

In 2023, charitable activities expenditure amounting to £42,379 was restricted.

The support and governance costs have been allocated to direct and grant making activities based on staff time spent. Total support costs allocated to grant activities is £415,606.

8. Grants payable

	2024 £	2023 £
Grants to institutions:		
Primary schools	279,497	231,270
Secondary schools	325,468	335,320
Universities	28,929	71,459
Organisations	167,047	78,575
Subtotal	**800,941**	**716,624**
Grants to individuals	114,535	107,673
Total	**915,476**	**824,297**

337 grants were awarded in 2024, compared with 275 grants in 2023.

Grants payable to institutions, net of write backs are as follows:

Primary schools	2024 £	2023 £
Abbey Village Primary School	3,550	5,500
Aldwyn Primary School	-	425
Ashton Gate Primary School	500	-
Avonmore Primary School	(1,000)	1,000
Bath and Wells Multi Academy Trust	7,500	6,000
Belgrave St Bartholomew's Academy	2,500	-
Bignold Primary School	250	325
Blowers Green Primary	1,070	-
Bramford Primary School	2,500	-
Briar Hill Infant School	5,290	250
Brook Lodge Primary School	1,900	5,500
Chard Preparatory School	2,500	5,500
Charlton Primary School	2,500	5,000
Chestnuts Primary School	1,930	1,980
City of London Academy	2,000	-
Cleveland Coast	3,400	-
Combe St Nicholas Church of England Primary School	2,500	-
Copley Primary School	1,000	2,000
Court de Wyck Church School	9,727	-
Cutcombe Church of England First School	250	-
Daven Primary School	250	250
De Beauvoir Primary School	5,000	-
Denbigh Primary School	2,500	2,500
Ditchingham Primary Academy	1,900	-
DRET Quay Academy	1,000	4,500

Primary schools (continued)	2024 £	2023 £
Durham Gilesgate Primary School	1,000	800
Easton Church of England Academy	463	-
Errington Primary School	-	5,500
Essex Primary School	4,770	2,500
Falmouth Primary Academy	2,500	5,000
Ferndale Primary and Nursery School	830	2,230
Gayton Primary School	-	1,000
Great Hollands Primary School	2,500	-
Greenmount Primary School	2,000	-
Greenway Primary School	6,904	6,770
Greet Primary School	5,500	-
Greswell Primary School and Nursery	-	150
Grimley & Holt Primary School	2,500	5,000
Gurnard Primary School	250	-
Hazeldene School	2,500	2,500
Hempshill Hall Primary School	2,500	5,500
Hertford St Andrew Church of England Primary School	-	250
Higher Lane Primary School	5,000	-
Hollingworth Primary School	5,150	425
Holy Family RC School	(2,500)	2,500
Holy Trinity Primary School	4,500	-
Holycroft Primary School	7,500	-
Hopwood Primary School	250	250
Hurst Knoll St James Primary School	150	-
Kates Hill Primary School	-	5,500
Kernow Learning	1,000	2,500
Kessingland Church of England Primary Academy	2,500	5,500
Kings Ash Academy	1,000	2,500
Kingsland Church of England Primary School	-	250
Ledbury Primary School	250	250
Lickhill Primary School	5,500	-
Little Sutton Primary School	250	250
Livingstone Primary And Nursery School	150	-
Lunt's Heath Primary School	-	1,000
Maiden Erlegh Trust	2,500	-
Medina Primary School	-	2,500
Millbrook Primary And Nursery School	150	-
Milnrow Parish Church of England Primary School	250	-
Milton St John's Church of England Primary School	-	150
Monk Fryston Church of England Primary School	5,000	-

Primary schools (continued)	2024 £	2023 £
Montem Primary School	-	3,747
Morgans Primary School	2,500	-
Mount Pleasant Junior School	-	3,150
Mylor Bridge School	-	200
New York Primary School	1,000	-
Okehampton Primary School	-	1,000
Ormiston Cliff Park Primary Academy	2,500	-
Oundle Church of England Primary School	-	2,230
Our Lady and Saint Kenelm Primary School	250	500
Our Lady of Mount Carmel First School	250	-
Our Lady of Mount Carmel Roman Catholic Primary School	3,500	150
Our Lady of Walsingham Roman Catholic Primary School	250	250
Outwood Primary Academy Lofthouse Gate	14,000	-
Oval Learning Cluster	2,500	2,500
Parochial CE Primary School	-	150
Pearl Hyde Primary School	2,500	-
Pluckley Church of England Primary School	16,000	16,000
Princes Risborough Primary School	2,500	-
Red Oak Primary School	1,000	2,500
Richard Taylor Church of England Primary School	600	1,950
Rivers MAT	-	4,985
Rockingham Junior and Infant School	2,500	2,500
Rushton Church of England Primary School	-	(1,000)
Rustington Community Primary School	10,000	-
Sandfield Close Primary School	2,500	5,500
Sandon Primary Academy	2,500	5,500
Sherford Vale Primary School	-	(649)
Silver Springs Primary Academy	150	6,000
Somerleyton Primary School	250	250
Springbank Primary School	-	(1,800)
St Agnes Church of England Primary School	1,000	500
St Alphege Junior School	-	250
St Andrew's and St Mark's Junior School	-	102
St Augustine's Catholic High School and Sixth Form Centre	-	4,450
St Catherine's Prep School	720	-
St Christopher's Catholic Primary School	250	2,500
St Clare's Catholic Primary School	-	2,500
St Clements Church of England Primary	(1,500)	-
St Edward's Catholic Academy	1,000	2,500
St George's Church of England Primary School	150	150

Primary schools (continued)	2024 £	2023 £
St George's Primary School	2,200	5,500
St John and St James Church of England Primary School	-	5,000
St John's Primary and Nursery School	1,000	-
St Joseph's Catholic Primary School	7,500	6,150
St Laurence's Catholic Primary School	2,500	2,500
St Leonard's Primary School	600	-
St Maria Goretti Catholic Academy	-	(2,000)
St Matthew's Catholic Primary School	600	1,650
St Pauls Church of England Primary School	300	1,505
St Peter's Church of England Primary School	-	425
St Peters Catholic Primary School	-	150
St Peter's Elwick Church of England Primary School	650	1,170
St Peters Junior School	5,000	5,500
St Stephen Churchtown Academy	-	1,000
Stella Maris Catholic Primary School	-	2,500
Streatham Wells Primary School	1,000	2,500
Summerfields Primary	5,500	-
Summerhill Academy	7,000	-
Summerhill Primary Academy	4,000	-
Sutton in Craven CP School	1,000	2,150
Sylvester Primary Academy	10,000	-
The Redstart Primary School	5,000	5,000
Trinity Primary Academy	(250)	250
Trumpington Park Primary School	2,500	-
Walford Nursery and Primary School	250	250
Walton Priory Middle School	1,870	1,750
Waterside Primary School	300	(1,500)
Westminster Primary Academy	723	-
Whitecote Primary School	1,000	-
Willenhall Community Primary School	-	5,000
Willow Brook Primary Academy	8,400	6,750
Woodham Academy	2,500	5,500
Woodton Primary School	5,000	-
Wybourn Community Primary School	1,000	2,500
Yew Tree Primary School	150	-
Total	**279,497**	**231,270**

Secondary schools	2024 £	2023 £
Abraham Moss Community School	-	2,500
Alder Community High school	4,250	2,200
Alexandra Park School	-	8,493
Alperton Community school	400	-
Alsop High School	5,500	-
Ark Schools	-	2,000
Arrow Vale Academy	1,000	-
Ashlyns School	157	-
Ashton Community Science College	(751)	9,614
Bedlington Academy	2,500	-
Beechen Cliff School	200	-
Benenden School	-	2,500
Better Futures Multi Academy Trust	1,300	-
Bideford College	-	(706)
Bishop Barrington Academy	(1,396)	11,831
Bishop Fox's School	1,000	-
Blackpool Aspire Academy	(1,000)	1,000
Blackpool Sixth Form College	-	1,000
Bonus Pastor Catholic College	1,000	2,500
Boston Endeavour Academy	500	-
Brighouse High School	-	1,150
Brixton Learning Collaborative	-	184
Burlington Danes Academy	-	13,005
Burnley College	1,785	-
Cabot Learning Federation	7,000	-
Cambourne Village College	12,933	16,581
Castle Rock School	2,000	-
Castle View Academy	-	(231)
Central Foundation Boys School	-	1,800
Chelsea Academy	-	1,700
Cheltenham Bournside	2,500	-
Chiltern Learning Trust	1,000	-
Chilton Academy	6,965	12,000
Chipping Campden School	4,570	-
Christopher Whitehead Language College and Sixth Form	-	3,000
Churchill Community College	-	6,805
City of London Academy Highbury Grove	-	1,450
City of London Academy Highgate Hill	3,500	-
Cleeve School	2,500	1,000
Consett Academy	500	2,750

Secondary schools (continued)	2024 £	2023 £
Co-op Academy Manchester	320	-
Dagenham Park Church of England School	-	500
Dane Court Grammar School	-	13,729
Deer Park Secondary	5,100	-
Didsbury High School	1,000	1,750
Diss High School	500	-
Durham Sixth Form Centre	3,000	-
East Norfolk Sixth Form College	2,000	-
Eastbury Community School	600	-
Egglescliffe School	-	1,128
Elizabeth Garrett Anderson School	1,050	-
Elton High School	7,118	-
Enfield County School for Girls	1,500	-
Excalibur Academies Trust	100	-
Exeter School	250	-
Fortsimere School	1,000	500
Framingham Earl High School	5,500	-
Great Western Academy	-	5,500
Hadley Learning Community	2,500	2,500
Haggerston School	-	750
Helston Community College	1,000	1,750
Hills Road Sixth Form College	5,907	5,230
Hodgson Academy	12,236	11,611
Hove Park School	5,500	-
Island Academy, Antigua	35	25,000
Ivybridge Community College	12,236	-
Jesmond Park Academy	250	(1,671)
Kents Hill Park Secondary	2,400	-
King Edward VI Five Ways School	13,220	-
King Edward VI Grammar School, Louth	-	10,432
King Edward VII Academy	1,000	2,500
Kings Norton Girls School	750	-
Kingsbridge Community College	1,250	4,496
Kingsley Academy	2,000	-
Liverpool College Independent School	-	100
Longridge Towers School	1,000	2,500
Longsands Academy	1,000	1,465
Lyndon School	5,000	5,000
Maiden Erlegh School	5,000	5,000
Malcolm Arnold Academy	-	3,900

Secondary schools (continued)	2024 £	2023 £
MAT	-	500
Matthew Moss High School	1,000	-
Merchant's Academy	-	2,002
Minsthorpe Community College	-	2,258
Newquay Tretherras	-	6,802
Noel-Baker Academy	5,500	-
North East Futures UTC	-	4,970
North East Learning Trust	1,000	1,000
North Tyneside Learning Trust	20,000	16,000
Northampton International Academy	2,000	2,000
Nunnery Wood High School	-	(1,400)
Ormiston Academies Trust	-	2,500
Ormiston Sir Stanley Matthews Academy	5,000	3,500
Our Lady's Roman Catholic High School	1,450	5,500
Oxford Spires Academy	1,750	-
Parmiter's School	-	750
Pegasus Academy (Holly Hall School)	4,756	-
Pendleton Sixth Form College	-	1,000
Presdales School Academy Trust	2,500	5,500
Queen Elizabeth's High School	2,500	5,500
Queen Katharine Academy	5,500	-
Redruth School	8,000	-
Reigate School	850	-
Rosebery School	151	-
Sharples School	-	(400)
Skipton Girls' High School	-	5,000
Spires Academy	-	1,000
St John Fisher Catholic College	625	11,611
St Marylebone Church of England School	-	(440)
Stokesley School	5,500	-
Stratton Upper School	12,000	10,000
Tapton School	1,000	2,000
The Academy at Shotton Hall	(3,000)	-
The Arnewood School	12,236	-
The Aspire Academy, Worcester	5,500	-
The Charter School East Dulwich	1,000	-
The Cotswold School	2,500	5,500
The Grangefield Academy	-	1,500
The Jo Richardson Community School	100	-
The Kingfisher Church of England Academy	463	-

Secondary schools (continued)	2024 £	2023 £
The King's School (Grantham)	1,000	2,500
The Kingsbrook School	2,500	5,500
The Mountbatten School	8,000	-
The North Halifax Grammar School	5,500	-
The Oldershaw School	2,500	-
The Priory Academy LSST (Lincoln)	3,670	5,000
The Priory School Hitchin	8,661	-
The Thetford Academy	2,970	-
The University of Birmingham School	7,053	6,631
The Victory Academy	5,000	-
The Whitby High School	1,000	2,450
Tring School	81	-
Trinity High School and 6th Form College	1,000	-
Truro School	-	(2,149)
Urmston Grammar School	-	(205)
Vista Academy Littleport	1,200	-
Wardle Academy	-	1,700
Wellington School	100	11,269
West Kirby Grammar School	-	675
Wildern School	4,645	-
William Farr School	7,472	-
Wyvern Academy	2,000	-
Total	**325,468**	**335,320**

Universities	2024 £	2023 £
Durham University	-	20,275
Harvard Business School	-	28,664
Keele University	-	(2,678)
King's College London	4,830	1,460
Manchester Metropolitan University	18,000	-
Newcastle University	-	(3,000)
Royal Holloway University of London	-	25
Sheffield Hallam University	250	250
The Open University	(290)	290
University of Birmingham	250	-
University of Bristol	2,500	2,400
University of Cambridge	3,389	9,584
University of Chester	-	2,250
University of Leeds	-	5,000

Universities (continued)	2024 £	2023 £
University of Lincoln	-	(87)
University of Liverpool	-	5,000
University of Manchester	-	7,550
University of Sheffield	-	(5,123)
University of York	-	(401)
Total	**28,929**	**71,459**

Organisations	2024 £	2023 £
47F Grantham RAFAC	535	-
4wardFutures	3,640	-
Action Against Cancer	25,000	-
ARC and You	4,923	4,495
Association for Science and Discovery Centres	2,500	-
Bolton Playing for Success	-	5,000
Cambridge Hands-On Science (CHaOS)	4,000	-
Cambridge Science Centre	-	5,000
Community Academies Trust	158	-
Discovering42 CIC	-	9,764
Founders4Schools	-	4,000
HMDT Music	-	4,500
Institute of Physics	15,000	-
KCL Womxn in Physics	375	-
Lightyear Foundation	5,000	-
Links to a Life	(4,900)	-
Living Paintings Trust	3,500	3,500
Maple Medical PRU	450	-
National Science and Media Museum	-	5,000
Physics Partners	3,250	-
Real Photography CIC	-	5,000
Rochdale Rockets	18,984	-
Rochdale Science Initiative C.I.C	10,000	10,000
Royal Trinity Hospice	-	(5,000)
SATRO	3,950	-
Science and Industry Museum	2,500	-
South of Tyne and Wearside Deaf Children's Society	3,362	-
Special Boat Service Association	15,000	-
Sports 4 Change CIC	5,000	-
St Mary's Ukrainian School Limited	4,820	-

Organisations	2024 £	2023 £
Starlight Children's Foundation	25,000	-
Success4All CIO	-	5,000
Teachometer	-	(1,624)
The Blackett Lab Family	5,000	5,000
The Clement James Centre	5,000	5,000
The Maternity Teacher Paternity Teacher Project	-	1,970
The Social Mobility Foundation	2,500	-
Toranj Tuition	-	5,000
Turtle Key Arts	-	4,970
Wiltshire Music Centre	2,500	2,000
Total	**167,047**	**78,575**
Grants to individuals	114,535	107,673
Grand total	**915,476**	**824,297**

A reconciliation of the grants payable and grant commitments figures shown in these accounts is as follows:

	2024 £	2023 £
Grant commitments at 1 September 2023	459,797	566,634
Commitments made in the period net of grants released	915,476	858,797
Grants paid during the period	(869,113)	(965,634)
Total	**506,160**	**459,797**

Grant commitments at 31 August 2024 are payable as follows:

	2024 £	2023 £
Within one year (included with note 15)	418,950	351,592
After more than one year (included with note 16)	87,210	108,205
Total	**506,160**	**459,797**

9. Support costs

	Total 2024 £	Total 2023 £
Staffing costs		
Wages, salaries and medical insurance	676,179	485,923
National insurance	66,897	44,154
Pension costs	35,863	24,917
Recruitment costs	2,104	4,601
Staff training and development	16,580	11,945
Consultancy costs	20,357	39,683
Subtotal	**817,980**	**611,223**
Office costs		
Office rental and costs	154,806	125,113
Printing, postage and stationery	885	1,611
Web and digital	1,842	6,379
Publications and promotional materials	19,130	9,701
Travel expenses	11,997	7,363
Depreciation and loss on disposal of assets	8,591	5,912
Payroll and other fees	1,876	1,297
Accountancy fees	22,654	26,483
Subtotal	**221,781**	**183,859**
Governance costs		
Legal fees	960	2,636
Audit fees	7,500	7,500
Trustee expenses		875
Subtotal	**8,460**	**11,011**
Total	**1,048,221**	**806,093**

These costs have been apportioned to the charitable activities according to the amount of staff time spent on them.

10. Net expenditure

This is stated after charging:

	2024 £	2023 £
Depreciation of tangible fixed assets: owned by the Trust	8,591	5,912
Auditor's remuneration – audit	6,250	6,250
Pension costs	35,863	24,917
Operating lease costs	78,786	76,523

11. Trustee remuneration and expenses and the cost of key management personnel

Staff costs were as follows:

The average number of persons employed by the Trust during the year was as follows:

	2024	2023
Charitable activities	21	16

The numbers of employees whose emoluments during the year fell within each band of £10,000 from £60,000 upwards were as follows:

	2024	2023
In the band £70,000 – £80,000	-	1
In the band £80,000 – £90,000	1	-

As at 31 August 2024, no balance was owed by the Trust in relation to the pension scheme (2023: £1,195).

No trustees received reimbursement of expenses or benefits in the year (2023: £nil).

The key management personnel of the Trust comprise the Trustees and Chief Executive. The Trustees all give their time and expertise without any kind of remuneration or other benefit in kind (2023: £nil). The total employment benefits, including employers NI of key management personnel over the year was £97,255 (2023: £93,793).

12. Tangible fixed assets

	Computer equipment £	Total £
Cost		
At 1 September 2023	42,768	42,768
Additions	5,376	5,376
At 31 August 2024	**48,144**	**48,144**
Depreciation		
At 1 September 2023	18,637	18,637
Charge for the year	8,591	8,591
At 31 August 2024	**27,228**	**27,228**
Net book value		
At 31 August 2024	**20,916**	**20,916**
At 31 August 2023	24,131	24,131

13. Fixed asset investments

	Listed securities £	Cash held for investment purposes £	Total £
Market value			
At 1 September 2023	62,902,024	1,665,158	64,567,182
Disposals (proceeds £3,297,272, realised gain £362,520)	(2,934,752)	-	(2,934,752)
Other cash movements	-	1,139,829	1,139,829
Revaluations / currency gains	10,736,013	(86,605)	10,649,408
Investment management fees	(559,187)	-	(559,187)
At 31 August 2024	**70,144,098**	**2,718,382**	**72,862,480**
Historical cost	**23,072,901**	**2,718,382**	**25,791,283**

All the fixed asset investments are held in the UK.

All investments are carried at their fair value. Investment in equities and fixed interest securities are all traded in quoted public markets, primarily the London Stock Exchange. Holdings in common investment funds, unit trusts and open ended investment companies are at the bid price or the NAV of the fund. The basis of fair value for quoted investments is equivalent to the market value, using the bid price. Asset sales and purchases are recognised at the date of trade at cost (that is their transaction value).

The Trust manages the investment portfolio themselves and regularly consults with market professionals on its investment strategy. The Trust is operating an investment policy that provides for a degree of diversification of holdings within different unit trust investments. The sole purpose of the investment strategy is to fund the annual expenditure of the Trust. The Trust has invested in a number of unit trusts in order to protect the Trust's exposure to volatility in the market and seek low risk investments wherever possible. The Investment Strategy is designed to seek absolute returns on its investments and does not differentiate between income arising from Interest and dividends or capital growth on its investments in its funding decisions.

All funds have monthly liquidity and the Trust regularly liquidates part of its Fund investments at the monthly NAV value to meet the expenditure of the Trust. The Trust makes investments both in Sterling and US dollars and from time to time hedges its foreign currency exposure.

The Trust does not make use of derivatives and similar complex financial instruments as it takes the view that investments are held for their longer-term growth and annual income.

The Trust has no material investment holdings in markets subject to exchange controls or trading restrictions.

14. Debtors

	2024 £	2023 £
Amounts due in more than 1 year:		
Rent deposit	19,410	19,410
Amounts due in less than 1 year:		
Trade debtors	13,818	12,000
Rebate of external management fees	16,000	13,000
Other debtors	23,890	29,891
Prepayments and accrued income	58,026	97,652
Total	**131,144**	**171,953**

15. Creditors: amounts falling due within one year

	2024 £	2023 £
Trade creditors	52,745	19,506
Other taxation and social security	20,337	17,252
Grants payable (note 8)	418,950	351,592
Other creditors	1,971	7,129
Accruals	77,185	82,834
Total	**571,188**	**478,313**

16. Creditors: amounts falling due after more than one year

	2024 £	2023 £
Grants payable (note 8)	87,210	108,205
Total	**87,210**	**108,205**

17. Reconciliation of cash

Reconciliation of net movement in funds to net cash flow from operating activities

	2024 £	2023 £
Net income/(expenditure) for the year (as per Statement of Financial Activities)	8,030,776	(929,468)
Adjustments for:		
Gains on investments	(11,592,570)	(1,800,912)
Dividends and interest from investments	(570,782)	(525,189)
Depreciation	8,591	5,912
Profit on disposal of fixed assets	(550)	-
Decrease lincrease) in debtors	40,809	(40,921)
Increase/(decrease) in creditors	71,880	(107,193)
Net cash used in operating activities	**(4,011,846)**	**(3,397,771)**

18. Analysis of cash and cash equivalents

	2024 £	2023 £
Cash in hand	46,615	195,233
Total cash and cash equivalents	**46,615**	**195,233**

19. Analysis of changes in net debt

	At 1 September 2023 £	Cash flows £	At 31 August 2024 £
Cash at bank and in hand	195,233	(148,618)	46,615

20. Statement of funds

Statement of funds: current year

	Balance at 1 September 2023 £	Income £	Expenditure £	Gains/ (Losses) £	Transfers £	Balance at 31 August 2024 £
General funds						
General fund	64,359,861	762,958	(3,747,190)	11,011,928	-	72,387,557
Restricted funds						
Energy Internships	-	10,425	(10,425)	-	-	-
STEM Enrichment Partnership	5,453	-	(5,453)	-	-	-
British Science Association Student Ambassadors	6,667	13,333	(4,800)	-	-	15,200
Total restricted funds	**12,120**	**23,758**	**(20,678)**	-	-	**15,200**
Total funds	**64,371,981**	**786,716**	**(3,767,868)**	**11,011,928**	**-**	**72,402,757**

Statement of funds: prior year

	Balance at 1 September 2022 £	Income £	Expenditure £	Gains/ (Losses) £	Transfers £	Balance at 31 August 2023 £
General funds						
General fund	65,304,881	738,497	(3,224,591)	1,541,074	-	64,359,861
Total unrestricted funds	**65,304,881**	**738,497**	**(3,224,591)**	**1,541,074**	**-**	**64,359,861**
Restricted funds						
Energy Internships	(3,750)	30,470	(26,720)	-	-	-
STEM Enrichment Partnership	318	10,416	(5,281)	-	-	5,453
Spacelink Learning Foundation	-	10,378	(10,378)	-	-	-
British Science Association Student Ambassadors	-	6,667	-	-	-	6,667
Total restricted funds	**(3,432)**	**57,931**	**(42,379)**	-	-	**12,120**
Total funds	**65,301,449**	**796,428**	**(3,266,970)**	**1,541,074**	**-**	**64,371,981**

Purpose of funds

Energy Internships – The Energy Internships restricted fund is for donations towards the cost of the internships programme from host industries. The funding will be spent on student's bursaries.

STEM Enrichment Partnership – this fund supports science, technology, engineering and mathematics (STEM) Clubs and space activities within UK schools, improving the quality of teaching and inspiring young people to pursue a STEM-related career.

Spacelink Learning Foundation – this fund is to be spent on space education activities in the Northeast.

British Science Association Student Ambassadors – this fund is to support a project in the Northeast, including mentoring of younger students, running of CREST clubs and achievement of CREST awards.

21. Analysis of net assets between funds

Analysis of net assets between funds: current year

	Unrestricted £	Restricted £	Total £
Tangible fixed assets	20,916	-	20,916
Investments	72,862,480	-	72,862,480
Net current liabilities	(408,629)	15,200	(393,429)
Long-term liabilities	(87,210)	-	(87,210)
Total funds	**72,387,557**	**15,200**	**72,402,757**

Analysis of net assets between funds: prior periods

	Unrestricted £	Restricted £	Total £
Tangible fixed assets	24,131	-	24,131
Investments	64,567,182	-	64,567,182
Net current liabilities	(123,247)	12,120	(111,127)
Long-term liabilities	(108,205)	-	(108,205)
Total funds	**64,359,861**	**12,120**	**64,371,981**

22. Commitments

The charity did not have any operating lease or capital commitments at the year end.

23. Related party transactions

There were no related party transactions during the financial year (2023: £nil).

Reference and administrative details

Trustees
Cameron Ogden (Chair)
Sir Peter Ogden
Lady Ogden
Tiffany Chawner
Edward Ogden
Tim Simmons

Charity registered number
1037570

Principal office
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From 4 November 2024
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Independent auditors
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The Ogden Trust

making physics matter

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Registered charity: 1037570

THE OGDEN TRUST

England & Wales - Charity number 1037570

Accounts

The Ogden Trust

making physics matter

Trustees' report and financial statements

for the year ended 31 August 2023

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Cover photograph: teachers from Tameside take part in the Ogden Phizzi CPD conference day.

Back cover photograph: teachers take part in the forces module of the Subject Knowledge for Physics Teaching CPD, Birmingham 2023.

Welcome from Chair and Chief Executive

This year we have continued to expand our programmes and our teams to better support the network of teachers and schools that we work with. Our Director of Education now works with the Chief Executive to focus on external stakeholders, relationship building with school leadership and growth in awareness of the Trust. A new Head of Operations is focusing on policies and procedures.

We remain committed to our strategy for 2021–26, reiterating our mission to enhance the teaching and learning of physics, and we continue to develop our programmes to make them accessible to those who find themselves most disenfranchised from physics and the opportunities it can bring.

We have refined and consolidated the support that we offer so we can best deliver what is needed within a physics teaching environment that is often challenging. We believe that confident, engaging delivery of physics in the classroom will help to enable young learners to better understand how the world works and how they can contribute to it and as such, teacher professional development and support is embedded throughout our central programmes.

We are working hard to ensure teachers feel secure in their physics knowledge and valued in their role – whether they are starting their teaching journey, find themselves teaching physics when it is not their specialism or are long-standing physics teachers with years of classroom experience.

As we head into the 25th year of the Trust we are looking forward to celebrating successes with our networks, advocates and physics friends, but perhaps more importantly we are excited to continue to grow and build our programmes so we can deliver our strategic objectives in practical action which will continue to make physics matter to more people.

Cameron Ogden
Chair of Trustees

Clare Harvey
Chief Executive

Our strategy

The Ogden Trust is a family charitable trust which supports the teaching and learning of physics. The Trust delivers programmes primarily for schools and teachers, as well as working with universities, community groups and employers.

Increase the uptake of physics post-16 by supporting physics education and engagement for all young people (4-18), particularly those in under-represented groups.

School-led partnerships to build

- supportive, collaborative teaching communities
- improvement in physics education and engagement
- enrichment opportunities
- strong environments for physics learning

Support for teachers of physics to provide

- ongoing professional development
- understanding, knowledge and teaching tools
- inspiration, skills and resources for practical physics
- a sense of appreciation and value

Physics opportunities for all through

- leadership, action and ideas
- working with universities, employers and community groups
- equitable access to physics-related enrichment
- understanding and experiencing career pathways from physics

The Trust's strategy for 2021–26, is firmly embedded within our programmes and the operations of the Trust. It reiterates our determination to enhance the teaching and learning of physics, and consolidates our commitment to challenging stereotypes, expanding access and opportunities, and making physics matter to more people – especially those who are most disenfranchised.

Our programme of teacher support and our continuing professional development (CPD) portfolio is now well-established to deliver support to teachers throughout their careers and across the key stages. A Head of Teaching and Learning now leads the development and delivery of our professional development programmes to ensure that all CPD is of a high quality and delivered consistently.

We are building links with senior leadership in schools and education trusts to ensure that we can communicate and reinforce the value of partnership working and CPD for teachers; and we remain committed to supporting areas that are most in need.

> Working with The Ogden Trust has opened up a rich new world of opportunities, resources, ideas, contacts and inspiration. Being part of a partnership has provided invaluable support and CPD. It has connected our schools so that we can share good practice, ideas, resources and opportunities. It has, without a doubt, enhanced and improved the teaching of physics-based science in all of the schools involved.
>
> Going into [an Ofsted science] deep dive with my experience of working as part of an Ogden partnership and completing PSQM gave me confidence and plenty to share. The Ofsted inspectors commented that: science was as strong as they'd ever seen it; principles and pedagogy were impressive; the science at our school was beyond the breadth required; and there was sophisticated evidence to show science is well led with a strong oversight.
>
> **Anna Perry**
> Teacher
> Ledbury Primary School
> East Herefordshire Partnership

Fundamental to our strategy and to our programmes and provision is equity, diversity and inclusion (EDI). Following an accessibility review and update we have launched an EDI strategy and we will continue to address systemic barriers in our programmes and events. Ongoing care and increased awareness and understanding is helping us to mitigate obstacles that may prevent participation, and ensures we take a proactive, strategic approach to inclusion, equity and accessibility. Our accessibility and inclusion advisory panel, which includes people with expertise and lived experience, continues to meet regularly; it is advising the Trust on how to make our programmes more inclusive and monitoring how we deliver our EDI strategy.

Priority actions

We will be working to grow The Ogden Trust profile and the reach of our programmes to enable more teachers to benefit from the support and opportunities that we provide.

We will be developing the evidence-base for our programmes and aiming to share our findings, practice and expertise more widely.

We are looking at ways to embed and progress inclusion and diversity across the organisation, dismantling any barriers that may exist and ensuring we provide an open and welcoming space both within the Trust and across our programmes and events.

Public benefit

The Trustees have assessed the disclosures made in the Trustees' report and consider that these sufficiently detail the significant activities undertaken in order to carry out the charity's aims for the public benefit. When planning the charity's activities, the Trustees have given regard to the Charity Commission's guidance on public benefit. The Trust's programmes in physics education are beneficial as they are for the advancement of science and education. Most of the programmes are open application and are available to many schools and teachers in England, meeting the criteria that they must benefit a sufficient section of the public.

Our achievements: 2022–23

105
partnerships

1,245
partnership events

1,146
partnership schools
(846 primary, 300 secondary)

Partnership events reached
236,578
people

Science Talk
338
early years practitioners

Phizzi Earth and Space CPD
939
teachers

KS3 Physics CPD
115
teachers from 85 schools

66
early career teachers: teaching core physics programme

31
early career teachers: developing physics specialism programme

48
coastal energy interns at 33 companies

32
Teach Physics interns at 25 schools

£136,522
awarded in 39 physics education grants

School partnerships

The School Partnerships programme operates from Early Years Foundation Stage (EYFS) through to the end of secondary education, addressing the transitions at each key stage. The programme works predominantly with local clusters of schools and established collaborations, such as multi-academy trusts. However, our Tameside Regional Partnership is now well-established, with more than 60 primary schools regularly involved, and we will continue to evaluate and evolve this place-based partnership approach.

Our partnerships work across the phases to encourage sharing of ideas, resources and expertise. The Trust encourages and facilitates schools to focus on:

- teacher professional development to help improve the teaching of physics; inspiring and committed teachers, secure in their subject knowledge, can inspire their students to take physics further.
- the wider learning environment, including support for technicians and teaching assistants, and investment in physics learning spaces and resources, all of which help to develop and embed a culture of science.
- enrichment through family and community group engagement, and networking with local employers to provide a range of broader physics experiences for pupils and enhance science capital.

Partnerships receive four years of funding with a further year of transition support to foster sustained partnership activity. A time buy-out (limited funding for half a day a week off timetable to lead the partnership) facilitates the initial set-up, co-ordination and reporting, ensuring a firm foundation from which partnerships can build.

In October 2022, 28 new partnership co-ordinators gathered for a partnership induction conference to meet the Ogden team and counterparts from other school partnerships.

There were 105 funded partnerships in the programme in 2022–23, involving 1,146 schools (846 primary, 300 secondary). Thirty-two of these partnerships officially launched at the start of the 2022 academic year: 12 were established collaboration partnerships and 20 were local clusters. In 2022–23, schools received more than £186,500 to support their programmes of partnership activity.

Partnerships recruited for 2022–23 were assessed and considered under various indicators of disadvantage. Forty-seven per cent of our year one partnership schools reported an above average free school meal registration (FSM6). In 2021–22, this figure was 35 per cent. Partnership applications from rural and coastal schools were up four per cent on the previous year.

We know that time is a limiting factor in establishing and maintaining a successful partnership and that the time buy-out offered to co-ordinators is an important ingredient in building effective and sustainable partnerships.

More than 90 per cent (29/32) of our new partnerships took a time buy-out; in our previous partnership cohort we had an 82 per cent up take (19/23) so we are on a welcome positive trajectory.

> Meridian Trust, a partnership of 14 secondary schools, 14 primary schools and three special schools has greatly benefited from the partnership time buy-out. As you can imagine, leading projects across the Trust is challenging given the number of schools. The time buy-out enables dedicated staff to organise the projects and communicate with staff and external agencies. Without the time buy-out, we would struggle to arrange the partnership projects.
>
> **James Brown**
> Curriculum Director of Science
> Ogden Meridian Partnership

Our network of regional representatives has increased in number over the past year to ensure we are able to better support our partnerships. Our regional reps have also been actively recruiting for new partnerships in rural and coastal areas, and in areas of social deprivation. In these areas, young people may face one or more barriers to participation in science including lack of local opportunity, lack of local jobs and lack of role models in science and scientific careers.

One hundred and seventeen teachers attended one of three regional partnership conferences for north, south and central England.

A regional approach to our partnership conference was introduced to encourage partnership participation and numbers did increase on the previous year. Attendance from partnerships in our northern region reached 79 per cent (2022: 75 per cent), for the midlands 87 per cent (2022: 84 per cent), and in the south we jumped to 96 per cent attendance (2022: 78 per cent). The programmes for each event included inspirational keynote speakers and expert practitioners, but also featured local opportunities to help build networks and share ideas. A celebration event for the Trust's 25th anniversary will replace the regional conferences next year but a more local approach will return for 2025.

£186,500
in grants for partnership activities

Co-ordinator time buy-out Year 1 partnerships
> 90%
(29/32)

> The conference was an incredible opportunity for science leads to come together to share ideas, experiences and most of all, feel immensely valued! I loved being able to learn from others and share my own knowledge to support others. The conference was, and always is, a celebration of science (physics in particular) and the people who are driving this subject forward across the nation – something The Ogden Trust should be very, very proud of.
>
> **Partnership conference attendee**

Professional development

Ogden partnership continuing professional development (CPD) is an important component of the programme with opportunities available for teachers from EYFS through to KS4 (Year 11).

More than 80 teachers and teaching assistants from 59 Tameside primary schools (representing 60 per cent of the eligible schools) gathered for an Earth and Space Phizzi CPD conference – following this CPD we estimate that the ideas, learning and resources will reach more than 11,000 children across those schools.

EYFS Science Talk
A half-day online CPD session to support communication and language through understanding the world

Phizzi CPD
A four-year cycle of primary science CPD

2022–23	2023–24	2024–25	2025–26
Earth & Space	Electricity	Forces	Light & Sound

KS3 Physics CPD
Physics input, collaborative planning and reflection, resources

Forces	Waves	Electricity

Three hundred and thirty-eight early years practitioners took part in one of six Science Talk sessions in 2022–23. The programme has been relaunched in the past 12 months and an online training session and resources are available to all primary schools in first year partnerships. The updated provision has been designed to meet the new EYFS framework; it embeds ideas and resources to support inclusion, accessibility, and diversity, with ideas for continuous provision and links to careers designed to inspire the youngest of learners. Science Talk now includes 20 science activities to support practical hands-on activities in early years settings, developing communication and language skills through science enquiry. Each activity is linked to a picture book, with a book pack provided after completion of the training.

Science Talk

In the academic year 2022–23, 102 Phizzi Earth and Space CPD sessions were held for primary schools in our partnerships. The events reached 939 teachers from 781 schools, meaning that more than 92 per cent of our eligible primary partnership schools took part. In 2021–22, this figure stood at 88 per cent. Overall, on a 1–10 scale, teachers attending the sessions showed a 3.24 point increase in confidence in working scientifically and a 2.8 point rise in their knowledge of Earth and Space.

> Following our partnership EYFS Science Talk CPD last year, our early years lead has taken the books, resources and activities and mapped them into the curriculum for the early years at our schools. Communication and language are always an early years' priority and we have been able to weave the Science Talk activities into our provision – enabling and supporting teachers to do a few things differently, but not adding any additional burdens.
>
> **Sandra Gaudan**
> Learning, Development and Partnerships Manager
> Primary Advantage Federation
> Ogden Primary Advantage Partnership

> Phizzi CPD is giving teachers the confidence, the support and the resources to inspire the scientists of tomorrow. But it is about more than just delivering the curriculum, the teachers are inspiring pupils to think like scientists; through our partnership, we are now showing pupils and their families what a scientist really looks like, and we are building real-world science links to climate and pollution, for example. The Ogden Trust partnership has helped our teachers to capture young minds and give them understanding and enthusiasm for science.
>
> **Steve Marsland**
> Headteacher
> Russell Scott Primary School
> Tameside Regional Partnership

Phizzi earth and space CPD

92%

of eligible primary schools took part

Primary schools in Year 5 partnerships can take part in Phizzi Forward which provides an opportunity for schools to consolidate and review how their Phizzi CPD is being implemented, how the resources are being used and how teaching and learning has improved. This new Phizzi component was successfully trialled in 2022–23 and will be delivered by regional reps across the partnership programme from 2023–24.

To ensure that progression continues from primary into secondary, teachers in the first year of a partnership can take part in KS3 Physics – a CPD programme for non-specialist teachers of physics which focuses on the key physics concepts and pedagogical approaches. One hundred and fifteen secondary teachers from 46 schools signed up for CPD sessions which covered the topics of forces, waves and electricity. Encouraging participation in our KS3 CPD continues to be challenging but feedback is positive.

Twenty teachers from three schools in the Maiden Erlegh Partnership attended a KS3 Physics CPD day to build their confidence and skills in delivering classroom physics.

> Thank you so much for an informative and interesting day. The sessions showcased some simple but effective hooks that we will now aim to embed in our scheme of work.
>
> **KS3 participant**

North Tyneside Learning Trust CPD conference.

> We are very fortunate as a trust and a collaborative partnership of schools to be working with The Ogden Trust. I don't very often get the opportunity to witness first-hand the impact and excitement generated by some of the opportunities the Trust brokers for schools, so it was wonderful to be able to join teachers at our [partnership CPD] conference. Thinking about a trip to the moon will never be quite the same for me again – isn't science learning awesome when it's delivered well!
>
> **Kehri Ellis**
> Chief Executive
> North Tyneside Learning Trust
> NTLT Partnership

Enrichment

Partnership funding helps to facilitate and enable physics-focused activities which are reported across five categories: enrichment, CPD, working with families, attainment and careers awareness. Partnerships determine which activities are most appropriate for their school community.

A total of 1,245 partnership activities/ events took place in 2022–23, the highest ever reported, with a spend of £186,579. These events reached 236,578 participants including students, families, teachers, technicians, teaching assistants and the wider community.

This year, enrichment events comprised 43 per cent of partnership activities and included (amongst others) transition events (between primary and secondary schools), science fairs, science libraries, science ambassador schemes, stargazing nights and astro camps.

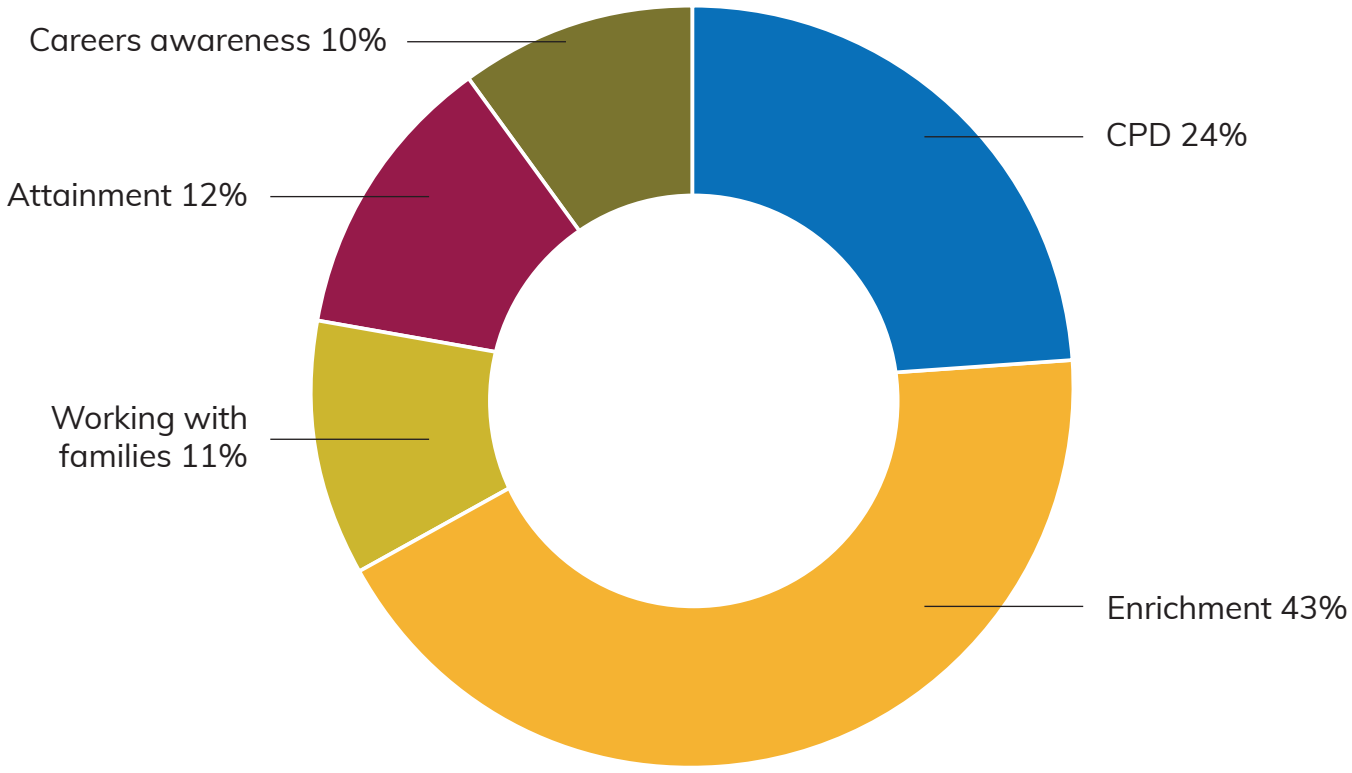
Tameside Partnership

60
primary schools

9,478
participants in partnership activities

Farnborough Partnership stargazing

2022–23



The Tameside Partnership activity reached nearly 9,500 participants. This included over 1,000 parents whose engagement was facilitated through a range of family activities, including 22 stargazing events hosted by individual schools. I have run science assemblies, which have been particularly effective at engaging pupils, and have reached nearly 2,500 KS1 and KS2 pupils across the borough.

Wayne Tabernor
Head of Physics
Alder Community High School
Tameside Partnership (secondary lead)

Wallasey Partnership book boxes

Science ambassador schemes are a fantastic way to develop, encourage and channel the science skills and enthusiasm of our young learners. We recruit and train new ambassadors each year and are always so impressed by our super scientists! This year our ambassadors helped us to celebrate the launch of our partnership Phiz Lab enjoying some hands-on science investigations, which included exploring forces with parachutes and experimenting with lemon batteries. They also took part in science communication training to help them share the science across their school communities. Ambassadors were on-hand to perform some science busking at our annual partnership summer science fair, practising some of the science and communication skills they had learnt at the Phiz Lab opening.

Mark Turner
Headteacher
Durham Gilesgate Primary School
Central Durham Partnership

Partnership activities (excluding Tameside)

Audience category	2022-23	2021-22
EYFS	11,956	9,013
KS1	39,394	30,933
KS2	101,161	80,292
KS3	41,981	17,027
KS4	12,887	6,602
KS5	2,567	546
Teachers	6,817	6,004
Technicians/teaching assistants	999	1,057
Parents/carers	17,564	20,980
Community/other	1,252	401
Total audience all activities	**236,578**	**172,855**

Secondary schools in current or legacy partnerships are eligible to apply for funding to support students to attend trips to **CERN.** The funds are directed to support those students who would otherwise be least able to participate due to their financial circumstances.

Trips to CERN are educational and inspirational. As well as giving students (and their accompanying teachers) a greater understanding of the particle physics involved in world-class research, CERN showcases a range of careers connected to physics and students can use their experience to inform future education and career choices. In 2022–23, eight CERN trips took place with funding support from the Trust (four of these grants were awarded in 2021–22). Trust funding supported approximately 47 pupil premium students to make the trip.

School culture

Building a culture of science within schools, with positive environments for physics learning and supportive and collaborative teaching communities, is important to developing the physics learning landscape. The wider learning environment, including new pilot programmes of support for technicians and teaching assistants, and investment in physics learning spaces and resources, is an integral part of our partnership programme.

All second-year partnerships with more than one primary school can apply for funding to open a **Phiz Lab**, creating a primary science environment to support teachers and engage pupils. The Phiz Lab programme is part of our ongoing strategy to help raise the profile of science, enhance pupil science capital and develop working scientifically skills.

There are currently 58 Phiz Labs in schools across England, three of which have been officially opened since September 2022; seven new Phiz Lab grants have been awarded in the past year. We have funded

Swadlincote Phiz Lab

> It's unusual for a primary school to have this kind of facility and this [Phiz Lab] has happened because we are part of The Ogden Trust. To have the funding and space to be able to do this is amazing. It is our vision for this to be a space allowing our children to become enthusiastic scientists, with pupils from other schools in the partnership taking advantage of this dedicated facility and for it to be a community hub.
>
> **Nashim Prabatani**
> Acting Assistant Headteacher
> St Edward's Catholic Voluntary Academy
> Swadlincote Partnership

PhD research which is looking to understand the impact of science laboratories in English primary school; the findings from this research should be published in 2023–24.

This year, we have worked in partnership with CLEAPSS to offer two fully funded training days to **technicians** in our secondary partnership schools; these small-scale highly focused, hands-on events were attended by 15 technicians. Ninety-four technicians signed up to our technician network and five received funding to attend the ASE technician conference.

We have also introduced a pilot programme for **primary teaching assistants** in our partnership schools; the new Primary Science Teaching Assistant Network has been opened to the schools in the south-west of England this year and includes six free online professional development sessions, which are still being delivered. The first two sessions were attended by an average of 20 people.

Legacy partnerships

Schools are encouraged to work towards a sustainable partnership, developing activities, resources and ideas that can be continued once the full partnership funding has ended. The Trust encourages and supports activities that develop students' science capital, increase careers awareness and enhance engagement with families and the local community.

At the end of their fifth year of funding, partnerships now transition into our Teacher Network which gives them access to additional support and opportunities. They receive reduced partnership funding to help support ongoing activities and shared events. In September 2022, 24 partnerships moved into their legacy phase.

Priority actions

Our partnership CPD will be reviewed by a newly restructured teaching and learning team with input from a CPD advisory panel; principles of practice will be launched to underpin our CPD programmes and ensure quality and consistency in content and delivery.

Effective, enthusiastic and high-quality physics teaching is crucial to our mission and we will work to increase teacher attendance at partnership professional development activities, both for primary and secondary.

Student ambassador programmes are a powerful tool for schools, utilising and developing student enthusiasm to perpetuate science engagement; we will produce resources to encourage and facilitate student ambassador programmes in partnership schools and will evaluate the impact.

We recognise the vital contribution that technicians make to secondary school science and will build our programme of support to encourage their professional development. In primary schools we will expand our support programme for teaching assistants so they can take an active role in supporting the delivery of primary science.

Five of the Trust's regional representatives are now accredited trainers for the Primary Science Capital Teaching Approach – a justice-oriented science teaching approach for primary schools developed following UCL-led research. We will be piloting this training with partnership primary schools.

Solihull Partnership

≈ 51,000
pupils have benefited from Phizzi CPD and resources

> 27,000
pupils have taken part in enrichment events or used the Phiz Lab

Sustainable partnerships

The **Solihull Partnership** was formed in 2015 and is now in its legacy phase, under the leadership of Emily Fryer.

The partnership has successfully continued as an active group by maximising the value of their funding and providing a supportive network for teachers. Importantly, they have the backing of senior leaders who understand that by supporting Emily and the Solihull Partnership "we strengthen science provision and help to inform our practice as a school, whilst also supporting the broader community development" (Headteacher, St Alphege).

The partnership still meets three times a year to network, exchange ideas, share good practice and plan activities. Legacy partnership funding continues to help support one or two activities, such as the annual science fair, a family learning evening or a hands-on workshop. These events involve families or are run online to remove the expense of transport.

As a result of the annual Phizzi CPD training sessions, teachers across the partnership are more confident and skilled in their science teaching; the Phizzi resources are still used across schools and year groups. Partnership teachers say the learning from the Phizzi CPD sessions has been shared with colleagues and is fully integrated into practice:

"Teachers regularly use Ogden Trust resources (the physical kit, booklets with investigations and website) to deliver science lessons. They are really useful resources which are used by all staff. The Science Talk cards that were created for the foundation stage and the associated training that went with them are excellent and loved by our early years team."

Over the years the partnership has developed into a mutually supportive network. The development and peer support aspects are valued by all teachers attending, but particularly by new or inexperienced subject leaders, with one commenting: "It is great to gain any new ideas and keep refreshing information. It's good to work together and know there are people to help and share ideas with."

Through the process of being partnership co-ordinator, Emily has developed personally and professionally. Her enthusiasm for sharing science, which was fuelled early on by an inspiring visit to CERN, has been complemented by an increased confidence in leading science. She has led on the development and piloting of a new Phizzi Curriculum at St Alphege and her headteacher observes that:

"Being part of the Ogden partnership has strengthened our Science Leader's understanding of science subject knowledge and has raised the profile of science across the whole school. It helps ensure that science is intrinsically built into the school's identity and has enabled us to keep abreast of current thinking and practice in this area of the curriculum."

Evaluating and understanding our partnerships and their local impact is important. This case study has been produced by Dr Alison Rivett, Evaluation Consultant, who has been working with the Solihull Partnership to better understand their long term, legacy partnership success.

Teacher support

Our teacher support programme is helping us build meaningful relationships with teachers throughout their careers; starting with Teach Physics internships for undergraduates who might be considering a career in teaching and continuing through to the Teacher Network which offers career-long support for all teachers of physics and primary science leads.

Helping teachers to improve their physics subject knowledge and confidence is a crucial component of our teacher support programmes; equipping teachers to deliver engaging physics lessons helps to positively change the physics learning landscape for students and will hopefully encourage teachers to remain in the profession. Our Subject Knowledge for Physics Teaching (SKPT) CPD programme is building momentum and reaching more teachers each term; we hope we can firmly establish the programme as a mainstay of our Teacher Support and CPD portfolio.

An online collection of resources is freely available to support the delivery of physics in the classroom, these resources are mainly aimed at primary physics but also offer ideas and resources throughout the key stages.

Early career

Teach Physics is the first step in the Trust's Early Career programme, facilitating school teaching placements for university undergraduates who might be considering a career in physics teaching. Thirty-two Teach Physics interns completed placements at 25 schools in summer 2023.

Subject Knowledge Foundations for Teaching Physics is an online CPD programme to support non-physicists who are preparing to start their science teacher training; six sessions cover the foundation knowledge needed to teach physics, helping students to embed and secure their physics understanding. Forty-eight students signed up for the programme with an average of 26 attending each session; twenty-one of the students attended four or more sessions. Twenty-six of the students completed the evaluation and they all said they would recommend the course.

Undergraduate university student	Teach Physics internships	4–5-week teaching placements in schools for university students
Pre-teacher training	Subject Knowledge Foundations for Teaching Physics	Six online sessions delivered in the summer term, for teachers about to start their training
Initial Teacher Education (ITE)	Foundations in Physics	Three online sessions delivered in partnership with NASBTT for teachers completing their ITE
Early career teacher year 1–2	Teaching Core Physics	Half-termly online subject knowledge CPD and mentoring sessions
Early career teacher year 3–5	Developing Physics Specialism	Bespoke one-to-one mentoring for teachers teaching physics GCSE and/or A-level

> It clearly demonstrated methods to improve understanding, as well as giving many common misconceptions and how to redirect students.
>
> **Subject Knowledge Foundations participant**

Sixty-six teachers signed up for our **Teaching Core Physics** programme, which provides half termly mentoring sessions in local peer groups for teachers in their first or second year of teaching. Thirty-one teachers in their third, fourth or fifth year of teaching were accepted onto **Developing Physics Specialism** which provides bespoke mentoring sessions and professional development support.

Teaching Core Physics and Developing Physics Specialism were both evaluated across seven measures of confidence

Thirty four early career and trainee teachers attended our Early Career Festival.

> The good vibes and conversations were absolutely amazing, I felt very important and valued.
>
> **Early Career Festival participant**

> I was a Teach Physics intern in 2016 and I now mentor our annual intake of Teach Physics interns at Alexandra Park School (APS).
>
> One of our interns from two years ago has now completed teacher training – they did their teaching placement at APS and have now been employed by our school as a full-time physics teacher. When they were an intern we could see that they had a spark in their eye when they were in front of a class and the drive to see students succeed; now as a physics teacher, they are passionate about the profession and their students, and have become an asset to our physics department.
>
> **Aston Dawsmith**
> Physics Teacher
> Alexandra Park School

(teaching, subject knowledge, lesson planning, supporting students, answering students' questions, making physics accessible and applying mathematical skills). Although evaluation response rates were low, the feedback was positive. Across the seven measures, 94 per cent of the 13 Teaching Core Physics respondents agreed they had increased in confidence in these areas; 100 per cent of the seven respondents on the Developing Physics Specialism programme agreed or strongly agreed that they had increased in confidence in these areas. Across two further measures of stress and anxiety when teaching physics, 96 per cent of the Teaching Core Physics responses and 93 per cent of the Developing Physics Specialism responses indicated that participants now felt less anxious when teaching physics.

We are also now working with the Primary Science Teaching Trust (PSTT) to trial the delivery of the **Primary Science Enhancement Award** to early career

teachers in our partnerships. The award was developed by PSTT for student teachers during their initial teacher training, but we are now offering the award to our early career primary teachers to consolidate and build on their science leadership potential. Also in the trainee teacher arena, the Trust continues to work with the National Association of School-Based Teacher Trainers (NASBTT) to provide physics CPD sessions. Three online webinars were held this year covering core physics topics and addressing areas such as pedagogy, misconceptions and formative assessment. Each session was attended by approximately 50 trainee teachers.

Subject Knowledge for Physics Teaching

In 2022, the Trust was contracted to deliver SKPT CPD as part of a national Science CPD Partnership which is funded by the Department for Education (DfE) and led by STEM Learning. During the past year, the contract has been extended to 31 August 2024.

With the ongoing challenges of teacher recruitment and retention, increasing numbers are having to teach KS3/4 physics without a physics specialism; SKPT is helping to develop subject knowledge and pedagogy, and to address misconceptions. SKPT is an important part of our Teacher Support programme and our efforts to ensure that teachers have the knowledge, skills and confidence to deliver inspiring and engaging classroom physics.

Across the first full year of SKPT and including the forces course that was delivered in the summer term of 2022, 403 SKPT modules have been successfully completed by 350 teachers. Recruitment to the programme remains challenging, with schools reluctant to release teachers for the face-to-face sessions, and teachers hard-pressed to find time for the independent learning and online tutorials; but momentum is building, and feedback is overwhelmingly positive. In the latest evaluation, conducted by STEM Learning, 97 per cent of participants rated the course good or very good and 99 per cent said it improved their subject knowledge and skills – 100 per cent of the teachers have reported improved confidence in teaching physics.

> The SKPT CPD has extended and deepened my physics subject knowledge and I am significantly more confident delivering physics content now than I was; without the support of the SKPT CPD I'm not sure I would have lasted on this journey.
>
> Without question I would recommend SKPT. It's a very important offer and the benefits are wide-ranging. The biggest selling point for me is that in key areas of the subject, SKPT has given me a conceptual understanding that wasn't there previously. Aside from making me more confident, it means that I am definitely better equipped to be in a classroom teaching physics.
>
> **Jules Becker**
> Teacher
> The Beacon School
> Jules has been a teacher for more than 20 years, teaching media studies, photography and film studies before deciding to add physics to his teaching portfolio.

Subject Knowledge for Physics Teaching CPD

Senior Teacher Fellowships

Senior Teacher Fellowships are awarded to teachers who have demonstrated exceptional commitment to physics education. As part of the fellowship, teachers plan and implement a physics education project, develop projects that deliver sustainable high-quality physics education to students, develop resources that can be made available to other teacher fellows or partnership schools and develop a plan for the sustainability of the project. Only three Senior Teacher Fellowships were awarded for 2022–23. The programme was then reviewed and revised in an effort to increase its reach and impact; 15 awards were subsequently made for 2023–24.

> Primary is the ideal age to capture children's imagination and give them a love for physics that will remain with them throughout their education and hopefully encourage more pupils into studying physics and onto physics careers.
>
> During the first year of my Senior Teacher Fellowship, I developed and delivered hands-on physics workshops, which inspired pupils and provided CPD and resources to the teachers. I delivered more than 35 sessions and assemblies and reached over 900 pupils and more than 60 teachers. It has been so rewarding to see an increase in science literacy, with pupils and staff more confident in science lessons and using scientific language. For me as a teacher, it has reinvigorated my long-standing passion for teaching and stimulated my drive to ensure that children can enjoy science both in an educational environment and their wider lives.
>
> I feel privileged to have witnessed the awe and wonder the pupils have shown. My fellowship will be continuing for 2023–24.
>
> **Charlotte Thompson**
> Teacher of Science
> Parkside Academy

Teacher Network

Our Teacher Network currently has more than 1,000 members (including current partnership teachers) and offers regular professional development opportunities to people who have previously been involved in Ogden programmes.

This year, ten secondary physics teachers took part in a visit to the STFC's Boulby Underground Laboratory to discover more about the ground-breaking research taking place and how it can be brought into the classroom. A further 19 secondary teachers of physics took part in EinsteinPlus UK, a three-day immersive professional development programme showcasing resources from the Perimeter Institute, hosted by Durham University and funded (and led) by The Ogden Trust. Sixteen teachers completed their evaluation, and all said they would recommend the course; 99 per cent of respondents stated that the course was good or excellent.

> I loved it! I'm buzzing with new ideas on how to deliver what I have learned and can't wait to show my fellow teachers too. Thank you very much to everyone involved. I've been to a lot of training events in my time, and I rate this as one of the best.
>
> **EinsteinPlus participant**

EinsteinPlus, Durham University

Teachers in the network are able to apply for a limited number of education research opportunities to help them build knowledge for themselves and the wider education sector. The Trust offers scholarships for suitable master's courses and part-time PhD programmes for practising teachers and two teachers are currently completing master's.

Resources

Ogden resources are freely available online and include a range of primary and secondary resources for physics teaching and learning, as well as guides to encourage and develop physics in school. Collectively, our resources have been downloaded over 8,000 times* over the past 12 months (September 2022–August 2023); our working scientifically resources remain the most popular.

Priority actions

The Trust is contracted to deliver SKPT until August 2024. To reach more teachers and achieve the DfE targets, alternative delivery models will be offered including bespoke sessions for entire science departments, and for multi-academy trusts and federations of schools, as well as options for residential SKPT sessions.

Efforts will continue to grow the early career programmes; amongst other revisions, this will include expanding Developing Physics Specialism to include teachers in their second year of teaching and a review of our provision for supporting initial teacher training.

The resources will be reviewed and refined to ensure they are providing the appropriate substantive and disciplinary knowledge.

Forty teachers attended the Ogden Physics Future conference – a free one-day professional development conference for teachers in our Teacher Network.

> It was really useful and I've already implemented some of the content in my A-level lessons.
>
> **Physics Futures conference participant**

*This figure has been estimated following the switch to GA4 during the past year.

Opportunities for all

The Trust is working to ensure that access to physics-related enrichment and future pathways are open to all regardless of socio-economic constraints. We are expanding and supporting opportunities for universities, employers and community groups to engage with young people, taking physics beyond the classroom and giving an insight into the real-world application of science.

University engagement

An external evaluation of the outreach officer programme has been concluded with the results published in 2023. The report confirmed that there have been a range of significant impacts as a result of the Ogden funding.

In the report, the authors (Laura Thomas and Charlotte Thorley) noted that without the seed funding provided by the Trust university outreach roles would not exist in such a widespread manner; and they report that departmental strategies have been influenced, particularly around working with underrepresented groups. The officers themselves have been part of a supportive community of practice, providing opportunities for professional development and sharing best practice.

The report concludes that over time, attitudes towards outreach have shifted because of the contributions of the outreach officers, especially with regards to the professionalisation of outreach within the departments with the quality of the activities increasing. The findings from this research are now informing our ongoing plans to support university physics outreach and the Trust continues to work with physics departments in universities across Great Britain.

> The Ogden funding and support enabled our [outreach] officer to take a leading role in developing our strategy and placing it on a firm footing with specific approaches to pair to our strategic goals. Ogden targets provided a useful basis which guided expectations and ambition.
>
> **Outreach Officer exit survey response, taken from the evaluation research**

Ogden Outreach Officer Network meeting, Cardiff 2022

> I am thrilled to be a part of the Ogden Trust Outreach Network! The Trust's facilitation of knowledge and resource sharing within an incredibly welcoming and talented community of physics outreach professionals has significantly enriched my outreach work.
>
> Insightful discussions at our network meeting and hearing about the impactful work of other outreach officers left me feeling inspired and ready to get stuck into a new academic year!
>
> **Dr Eliza Hunt**
> Outreach, Widening Participation and Public Engagement Officer
> School of Physical and Chemical Sciences
> Queen Mary University of London

Although the programme of funding for university physics outreach officers has now concluded, the Trust continues to fund and facilitate an Outreach Officer Network that is open to all outreach practitioners at

universities in Great Britain. We currently have 32 members enrolled in the network, which meets regularly throughout the year. Twenty-one people are actively engaged in the network, which provides access to training and funding opportunities, and shares practice and ideas.

Each year, members of our Outreach Officer Network are invited to nominate an undergraduate and postgraduate ambassador, to celebrate their contribution to physics outreach. This year there were 11 recipients of these awards.

> I've always wanted to make a positive impression through outreach and show children that studying physics is an option for them. I would never have chosen to study physics without the influence of my teacher at school, so I understand how important it can be to have a role model or encouragement...
>
> **Ambassador award recipient**

A second cohort has completed the Ogden/STFC funded programme in **Leadership for Outreach and Public Engagement** (OPE) – with thirteen participants from twelve institutions taking part. Feedback revealed that all participants agreed that the programme was worth the time they invested in it; participants felt more confident leading OPE, could apply what they had learned from the programme and felt that the programme improved both knowledge and skills in leading OPE.

Our **collaborative funding programme** – launched in 2022 to provide three years of funding to support a strategic outreach collaboration between university physics departments – is currently funding Orbyts. This funding has enabled Orbyts to open new hubs in Leicester, northeast England, UCL Medical Physics, and a trial in Kent.

These projects join established Orbyts hubs at Mullard Space Science Laboratory, the London Centre of Nanotechnology and UCL Department of Physics and Astronomy.

These initiatives support our efforts to build a broader more sustainable engagement with university physics departments and physics outreach professionals, developing a collaborative and long-term commitment to projects that will have a more profound and lasting impact.

Employer engagement

Engaging with employers can provide a tangible connection between physics and future careers, highlighting the many and varied pathways that can emerge from studying physics and other STEM subjects.

Coastal Energy interns, Malachi and Lily with their research poster.

The **Coastal Energy internship programme** is one way that the Trust is engaging with employers and working in priority areas of deprivation – many coastal areas in England are facing socio-economic challenges. The internships provide bursaries for Year 12 and Year 13 students to undertake a 20-day summer placement with a local company in the energy sector. Internships provide a vital springboard into future possibilities, broadening access to career insights, providing meaningful work experience and engaging students in crucial conversations about renewable energy and the environment. The internships are run in partnership with local education

providers in East Anglia, Barrow, Blyth and Ulverston, who each have Coastal Energy college champions. The internships are only available to students in partner institutions.

This year, 48 students were placed at 33 host organisations. Feedback indicates that the programme is having a positive impact on the sector: in 2023, 72 per cent of host companies surveyed said that the results of their interns' projects were extremely useful to the business; 86 per cent of the interns stated that their internship had impacted their plans and career aspirations.

> We know that these internship opportunities provide a wonderful way for young people to gain experience in the world of work through an applied and meaningful project. This year we have heard from two of our 2022 interns who have both now secured apprenticeships. Thomas White completed his internship with Vattenfall – an experience which helped him to secure his apprenticeship with National Grid. Domantas Baltaragis is now completing a degree apprenticeship at Coventry University, sponsored by his 2022 internship host company, TECOSIM, a global specialist in computer-aided engineering (CAE) and simulation.
>
> **John Best**
> Ogden Coastal Energy Consultant

Community engagement

Community engagement ideas are being explored and developed. This includes work with organisations close to the London head office and support for initiatives in Rochdale, which is where Sir Peter Ogden was born and raised.

Priority actions

The outreach officer network is the lynchpin of our university engagement; we want to increase member participation and develop the offering to include an annual conference, monthly meetings, more CPD funding and termly themed speakers.

The Coastal Energy internship programme in Barrow will be developed in line with the successful East Anglian model with continued investment in a local lead and college champions.

Pilot physics activities will be delivered with the ClementJames Centre in West London, as part of ongoing community engagement initiatives.

Rochdale Science Initiative

> An Ogden physics education grant helped us to deliver our annual Science Extravaganza which this year saw more than 1,400 people experiencing a huge range of science activities celebrating the world of STEM. Ogden regional rep, Melissa Lord contributed to the planning for the event and to the wider conversations about developing and growing the Rochdale Science Initiative – the community interest company that now leads this annual festival. Melissa also shared her own physics investigations at the festival. We believe that bringing science into the heart of our communities can engage minorities and the extravaganza was a prime example of what we can achieve; the audience was a celebration of diversity and multi-culturalism.
>
> **Mohammed Rahman**
> Founder CEO, Rochdale Science Initiative

Grants

In line with our strategy to increase the uptake of physics at post-16, particularly for under-represented students, the Trust awards funding to projects outside of our core schemes which are aimed at improving the teaching and learning of physics.

There are three physics education grant application windows throughout the year for small grants to support the teaching and learning of physics; all applications and reports are completed online. The grants are wide-ranging and support new ideas as well as established good practice. Since September 2022, 39 grants have been awarded to the value of £136,522.

Whilst these grants are awarded for standalone projects, we encourage schools to use a funding award as a stepping-stone into a longer-term relationship with the Trust, sometimes as a gateway to the Teacher Network or to forming a school partnership.

In the Institute of Physics Eureka awards, Avanti Field's Year 8 student Anika came in first place with her racing track board game exploring Newton's third law of motion.

> We really wanted to inspire our students to take physics further. We have a large cohort of Asian girls who are very underrepresented in the subject, so engaging them was especially important to us. Our Ogden grant, and the support we received, helped us to establish and improve our physics provision and develop our newly qualified teaching staff, many of whom had limited experience in teaching physics. In 2022 we had our first Year 11 cohort: 23 per cent took separate science and all 26 students achieved grade 9–5 in physics. We are a small school with only 115 Year 11 students, and we think about 10 per cent of the cohort continued with physics in further education.
>
> **Kalpana Patel**
> Head of Science
> Avanti Fields School, Leicester
> (opened in 2018)

> We received a physics education grant for a project to support our local schools with the delivery of electricity and forces in the primary science curriculum, this included teacher CPD, resource and primary workshops. The project reached over 400 primary pupils and strengthened our local network contributing to our successful partnership application.
>
> **Ellie Peacock**
> Science Teacher
> Mountbatten Science Academy
> Southampton Partnership

Further to our physics education grants, an additional three grants were made to organisations supporting other charitable interests of the Trustees; these grants are not open for applications and are solicited directly.

Research and communications

The Trust continues to raise its profile in the physics education arena, delivering our own programmes and initiatives, collaborating on wider research to inform the broader physics education community and commissioning independent research.

We have attended more national education conferences over the past year, and will continue to build our profile and presence in these important networks.

This year, with support from the Trust, the Science and Engineering Education Research and Innovation Hub (SEERIH) at the University of Manchester published **Being Focused: monitoring the 10 key issues**. This report provides practical guidance to the issues identified in previously published 10 Key Issues Report (SEERIH, 2021). Being Focused provides guidance to science teachers and senior leaders when monitoring teaching and learning in primary schools. The guidance informs the development of a range of approaches that form a cyclical process of evidence-informed and robust monitoring, towards improving children's learning experiences in primary science.

Our programmes and our research are giving us a more prominent and influential voice in physics education and our communication channels are increasingly active. Our engagement on social media, especially X, continues to increase despite the channel feeling increasingly unstable; over the past year, we have gathered nearly 500 new followers and at the end of August 2023, had reached a total of 5,540. Almost 400 'tweets' have been made, achieving nearly 500,000 impressions (the number of times a post is shown to people across the platform). Our followers on Facebook have increased to 1,700.

We have more recently started to actively use our LinkedIn page, which had largely been dormant; this now feels like a useful and relevant channel for communication. Our followers on LinkedIn have increased from just under 400 to more than 660 over the past few months.

Each of these platforms enable us to contribute to conversations and engage with a wider audience to share news, ideas and practice from across our programmes.

Priority actions

We will continue the process of delivering and maintaining accessibility standards and building representation, diversity and inclusion for our website, publications, and resources.

We will work to further raise our profile in education media and at events so we can contribute more fully to national conversations on physics education and share our expertise and research results more widely.

We will continue to develop our use of social media, more closely monitoring our analytics to feed into a broader digital communications strategy. A Digital Marketing Apprentice will be supporting this work.

Governance, structure and management

Constitution

The organisation was registered as an unincorporated charity on 25 March 1994. The charity is governed by a trust deed, and a supplemental deed dated 18 May 1998. It is registered with the Charity Commission, Charity Registration Number 1037570.

The charitable objects of the Trust (updated in 2022) allow the Trustees to advance general charitable purposes, in particular, but not limited to:

(i) the advancement of education;
(ii) the advancement of science; and
(iii) the prevention or relief of poverty and the relief of those in need, by reason of youth, age, ill-health, disability, financial hardship or other disadvantage.

Appointment of Trustees

The Trustees are appointed by the existing Trustees. At any one time, there must be a minimum of three Trustees. There were no changes to the Trustee board this year.

Induction and training of Trustees

When new Trustees are appointed, there are procedures in place to ensure that they clearly understand their duties and responsibilities and can assess their own training needs. Most Trustees are long-standing and are able to support the development of new members of the Board.

The Trustees are briefed bi-annually by the Chief Executive about their responsibilities and liabilities as Trustees.

Organisational structure and decision making

The Trustees are responsible for the policies, activities and assets of the charity. They meet four times a year to review developments and activities, and to make any important decisions. When necessary, the Trustees seek advice and support from the charity's professional advisers, including investment managers and accountants. Expert advisers in physics education may also be consulted where appropriate. All trustees give their time voluntarily and receive no benefits from the charity. Any expenses reclaimed from the charity are set out in note 12 to the accounts.

The day-to-day management of the charity's activities, and the implementation of policies, is delegated to Clare Harvey, Chief Executive, in line with an agreed scheme of delegation. At their meetings, the Trustees will review the investment performance, strategic changes to programmes, the impact of programme activities and grant proposals. The Chief Executive's pay is determined by the Trustees who consider a range of factors.

Diversity and inclusion

Diversity and inclusion are core values of our organisation, and we are committed to providing an inclusive workplace for staff and consultants. This year we launched an equity, diversity and inclusion policy which was developed with guidance from our advisory panel who will continue to help us monitor development and delivery of our approach. Termly training around equity, diversity and inclusion is ongoing, ensuring staff and consultants are continuing their learning journey and developing their understanding in this area.

This year, we completed a staff survey and following the results, we have renewed our focus on staff wellbeing and mental health. A staff wellbeing committee has been established and trained mental health first aiders are now available within the team; staff can also now access an employee assistance programme which provides a range of free, confidential support for any issues staff may be experiencing at work or in their personal life.

Financial summary

Key financial performance indicators

The Trust makes a significant financial investment in direct programme support each year, primarily professional development activities for teachers. In addition, smaller grants (typically less than £5,000) are awarded each year outside of our programmes to support schools, colleges and other organisations who wish to carry out projects or activities that support the teaching and learning of physics. Total charitable expenditure in 2022–23 was £3,266,970, a significant increase from £2,345,272 in 2021–22. Of this expenditure, £2,762,652 was spent directly on physics education activities. The School Partnerships programme still constitutes the biggest single area of spend. Teacher Support has seen a funding uplift of more than 50 per cent this year and our Subject Knowledge for Teaching (SKPT) CPD programme completed its first full year which also required significant investment.

The investment gain in this period has maintained the portfolio within the higher end of our reserves target, in line with investment objectives. However, the Trustees are always aware that there are external factors which could affect the achievements of their objectives as all of the Charity's assets are made up of investments and cash, the result of which are dependent on the general performance of the UK and overseas stock markets. In order to minimise this risk, the Trustees set prudent investment

Expenditure by programme

September 2022 – August 2023

- School Partnerships
- Teacher Support
- Teach Physics internships
- Subject Knowledge for Physics Teaching
- Ogden Outreach Officers
- Grants & bursaries
- Other physics activities
- Other charitable purposes

Expenditure by type

September 2022 – August 2023

- Direct costs
- Grant funding of activities
- Support & governance costs

policies and place reliance on the investment managers to monitor and advise on necessary investment changes and suitable asset allocation.

Investment policy and performance

There are no restrictions on the charity's power to invest. The investment strategy is set by the Trustees and takes into account income requirements, the risk profile and the investment manager's view of the market prospects in the medium term. The overall investment policy is to maximise total return with a target of 5 per cent; and this year we have maintained a satisfactory and steady growth on investment.

Reserves policy

As explained above, the charity carries out a range of activities, some of which comprise projects requiring significant ongoing financial commitment and investment. The Trustees have examined the requirements for free reserves, ie, those unrestricted funds not designated for specific purposes or otherwise committed. As the majority of the investments are liquid, the majority of the Trust's funds are free reserves.

The Trustees' policy is to manage financial resources in such a way as to provide in full for the grant and bursary commitments made, and to ensure similar levels of commitment in the future. The free reserves must therefore be sufficient to generate sufficient return to allow this to happen. In the current financial climate, the Trustees estimate this amount to be £50,000,000–£70,000,000.

The balance sheet shows free reserves (unrestricted funds less tangible fixed assets) of £64,335,730 (2022: £65,294,319), which is well within the acceptable parameters, and only just outside the top quartile of the target range.

Risk management

In line with the requirement for Trustees to undertake a risk assessment exercise and report on the same in their annual report, the Trustees have looked at the risks The Ogden Trust currently faces and have reviewed the measures in place, or needing to be put in place, to deal with them. The Trustees have identified seven main areas where risks may occur, and a comprehensive risk register has been produced.

Having assessed the major risks to which the charity is exposed, in particular those relating to its investments and its finances, the Trustees believe that by monitoring reserve levels, ensuring controls exist over key financial systems, and by examining the grant management processes carried out by the charity they have established effective systems to mitigate those risks.

This year, threats to cyber security have been added to our register of risk, with measures in place to mitigate against loss of funds or data caused by a cyber security breach.

Risk	Mitigation
Poor investment returns	These are monitored in quarterly Trustees' meetings and if poor returns are expected grant making can be reduced or halted.
Cyber security breach	The Trust has achieved Cyber Essentials Plus accreditation, meaning systems are in place to help counter any cyber breaches or fraud; in addition, the Trust has cyber security insurance in place.
Programme participants behaving in an inappropriate fashion	Programme participants are in contact with the Trust throughout the duration of their programme and such behaviour can be addressed when required.
Grant holders misspending funds	Grant holders are required to account for their spending in their reporting and misspent funds can be reclaimed.
Safeguarding	The Trust has a safeguarding children policy as well as staff behaviour policies. All staff have undertaken child protection and safeguarding training.
Sickness affecting staff	Processes and procedures are now in place for a hybrid working model. When staff are in the office, it is well spaced, ventilated and regularly cleaned. Staff are encouraged to work from home if appropriate to prevent the spread of illnesses.
Data protection	The Trust has a data protection policy and a retention and disposal policy. The Chief Executive is the Data Protection Officer. All staff have had training on data protection.

Trustees' responsibility statement

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

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity 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 judgments and accounting estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation;
- 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.

The Trustees are responsible for keeping proper accounting records that are sufficient to show and explain the charity's transactions and disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity 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 charity's auditor is unaware;
- they 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 charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

This report was approved by the Trustees, on 9 February 2024 and signed on their behalf by:

Cameron Ogden

Independent auditor's report to the Trustees of The Ogden Trust

Opinion

We have audited the financial statements of The Ogden Trust (the charity) for the year ended 31 August 2023 which comprise the statement of financial activities, balance sheet, statement of cash flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- Give a true and fair view of the state of the charity's affairs as at 31 August 2023 and of its incoming resources and application of resources for the year then ended.
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice.
- Have been prepared in accordance with the requirements of the Charities Act 2011.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's re-sponsibilities for the audit of the financial statements section of our report. We are independent of the charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charity's ability to continue as a going concern for a period of at least twelve months from when the financial state-ments are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are de-scribed in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees' annual report other than the financial statements and our auditor's report thereon. The trustees are responsible for the other in-formation contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not ex-press any form of assurance conclusion thereon.

Our responsibility is to read the other information and, in doing so, consider whether the other infor-mation is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit, or otherwise appears to be materially misstated. If we identify such material in-consistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are re-quired to report that fact.

We have nothing to report in this regard.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the charity and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' annual report.

We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 requires us to report to you if, in our opinion:

- sufficient accounting records have not been kept;
- the financial statements are not in agreement with the accounting records and returns; or
- we have not obtained all the information and explanations necessary for the purposes of our audit.

Responsibilities of trustees

As explained more fully in the statement of trustees' responsibilities set out in the trustees' annual report, the trustees are responsible for the preparation of the financial statements and for being satis-fied that they give a true and fair view, and for such internal control as the trustees determine is nec-essary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charity or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material mis-statement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic deci-sions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in re-spect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud are set out below.

In identifying and assessing risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, our procedures included the following:

- We enquired of management, which included obtaining and reviewing supporting documentation, concerning the charity's policies and procedures relating to:
  - Identifying, evaluating, and complying with laws and regulations and whether they were aware of any instances of non-compliance;

  - Detecting and responding to the risks of fraud and whether they have knowledge of any actual, suspected, or alleged fraud;
  - The internal controls established to mitigate risks related to fraud or non-compliance with laws and regulations.
- We inspected the minutes of meetings of those charged with governance.
- We reviewed the financial statement disclosures and tested these to supporting documenta-tion to assess compliance with applicable laws and regulations.
- We performed analytical procedures to identify any unusual or unexpected relationships that may indicate risks of material misstatement due to fraud.
- In addressing the risk of fraud through management override of controls, we tested the ap-propriateness of journal entries and other adjustments, assessed whether the judgements made in making accounting estimates are indicative of a potential bias and tested significant transactions that are unusual or those outside the normal course of business.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or mis-representation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the Charity's trustees, as a body, in accordance with section 144 of the Charities Act 2011 and the regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the Charity's trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charity's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Goldwins

Goldwins Limited
Chartered Accountants
Statutory Auditor
75 Maygrove Road
West Hampstead
London NW6 2EG
Date: 12 February 2024

Goldwins Limited is eligible for appointment as auditor of the charity by virtue of its eligibility for ap-pointment as auditor of a company under section 1212 of the Companies Act 2006

Statement of financial activities for the year ended 31 August 2023

	Note	Unrestricted funds 2023 £	Restricted funds 2023 £	Total funds 2023 £	Total funds 2022 £
Income from:					
Donations	2	720	57,931	58,651	23,622
Charitable activities	3	212,588	-	212,588	79,162
Investments	4	525,189	-	525,189	479,237
Other income	5	-	-	-	18,205
Total income		**738,497**	**57,931**	**796,428**	**600,226**
Expenditure on:					
Raising funds	6	372,709	-	372,709	303,170
Charitable activities	7	2,851,882	42,379	2,894,261	2,042,102
Total expenditure		**3,224,591**	**42,379**	**3,266,970**	**2,345,272**
Net expenditure / income before investment gains		**(2,486,094)**	**15,552**	**(2,470,542)**	**(1,745,046)**
Net gains on investments	14	1,541,074	-	1,541,074	7,566,400
Net (expenditure)/ income		**(945,020)**	**15,552**	**(929,468)**	**5,821,354**
Net movement in funds		**(945,020)**	**15,552**	**(929,468)**	**5,821,354**
Reconciliation of funds:					
Total funds brought forward		65,304,881	(3,432)	65,301,449	59,480,095
Total funds carried forward	21	64,359,861	12,120	64,371,981	65,301,449

The notes on pages 36 to 60 form part of these financial statements.

Balance sheet as at 31 August 2023

	Note	31 August 2023 £	31 August 2022 £
Fixed assets			
Tangible assets	13	24,131	10,562
Investments	14	64,567,182	65,787,408
Total fixed assets		**64,591,313**	**65,797,970**
Current assets			
Debtors	15	171,953	131,032
Cash at bank and in hand		195,233	66,158
		367,186	**197,190**
Creditors: amounts falling due within one year	16	(478,313)	(621,264)
Net current liabilities		**(111,127)**	**(424,074)**
Total assets less current liabilities		**64,480,186**	**65,373,896**
Creditors: amounts falling due after more than one year	17	(108,205)	(72,447)
Net assets		**64,371,981**	**65,301,449**
Charity funds			
Unrestricted funds	21	**64,359,861**	**65,304,881**
Restricted funds	21	**12,120**	**(3,432)**
Total funds		**64,371,981**	**65,301,449**

The notes on pages 36 to 60 form part of these financial statements.

The financial statements were approved by the Trustees on 9 February 2024 and signed on their behalf, by:

Cameron Ogden
Trustee

Statement of cash flows for the year ended 31 August 2023

	Note	2023 £	2022 £
Cash flows from operating activities			
Net cash used in operating activities	18	**(3,397,771)**	**(£1,953,781)**
Cash flows from investing activities			
Dividends, interests and rents from investments		525,189	£479,237
Purchase of property, plant and equipment		(19,481)	(9,654)
Proceeds from sale of investments		3,198,423	2,223,287
Purchase of investments		(177,285)	(800,800)
Net cash provided by investing activities		**3,526,846**	**1,892,070**
Change in cash and cash equivalents in the year		**129,075**	**(61,711)**
Cash and cash equivalents at the beginning of the year		66,158	127,869
Cash and cash equivalents at the end of the year		**195,233**	**66,158**

The notes on pages 36 to 60 form part of these financial statements.

Notes to the financial statements for the year ended 31 August 2023

1. Accounting policies

1.1 Basis of preparation of financial statements

The financial statements have been prepared in accordance with the Charities SORP (FRS 102) - Accounting and Reporting by Charities: Statement of Recommended Practice 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 January 2019), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The Ogden Trust meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant policy.

1.2 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the company for particular purposes. The costs of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

1.3 Going concern

The Trustees have reviewed the financial position of the charity and have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Accordingly, the financial statements continue to be prepared on the going concern basis.

1.4 Income

All income is recognised once the charity has entitlement to the income, it is probable that the income will be received and the amount of income receivable can be measured reliably.

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity; this is normally upon notification of the interest paid or payable by the Bank.

Dividends are recognised once the dividend has been declared and notification has been received of the dividend due.

Income tax recoverable in relation to investment income is recognised at the time the investment income is receivable.

Donation income is recognised when received. Performance-related grant income is recognised in line with the performance of tasks specified in the grant agreement.

Other income is recognised in the period in which it is receivable and to the extent the goods have been provided or on completion of the service.

1.5 Expenditure

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

Support costs, including governance costs, are those costs incurred directly in support of expenditure on the objects of the charity and include management carried out at the principal office. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements. Support and governance costs have been allocated to activities based on staff time spent.

Grants payable are charged in the year when the offer is made except in those cases where the offer is conditional, such grants being recognised as expenditure when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the period end are noted as a commitment, but not accrued as expenditure.

Expenditure on raising funds represents the fees paid to investment managers in connection with the management of the Charity's listed investments.

All resources expended are inclusive of irrecoverable VAT.

1.6 Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

1.7 Tangible fixed assets and depreciation

Tangible fixed assets are carried at cost, net of depreciation and any provision for impairment. Depreciation is provided at rates calculated to write off the cost of fixed assets, less their estimated residual value, over their expected useful lives on the following bases:

Fixtures & fittings	20% per annum based on cost
Computer equipment	25% per annum based on cost

1.8 Investments

Fixed asset investments are a form of financial instrument and are initially recognised at their transaction cost and subsequently measured at fair value at the Balance Sheet date, unless fair value cannot be measured reliably in which case it is measured at cost less impairment.

All gains and losses are taken to the Statement of Financial Activities as they arise. Realised gains and losses on investments are calculated as the difference between sales proceeds and their opening carrying value or their purchase value if acquired subsequent to the first day of the financial year. Unrealised gains and losses are calculated as the difference between the fair value at the year end and their carrying value.

Investment gains and losses, whether realised or unrealised, are combined and shown in the heading 'Net gains/(losses) on investments' in the Statement of Financial Activities.

1.9 Foreign currencies

Monetary assets and liabilities denominated in foreign currencies are translated into sterling at rates of exchange ruling at the balance sheet date.

Transactions in foreign currencies are translated into sterling at the relevant monthly average exchange rate.

Exchange gains and losses are recognised in the Statement of Financial Activities.

Foreign exchange gains and losses arising on investments are disclosed within 'Net gains/(losses) on investments' in the Statement of Financial Activities.

1.10 Debtors
Trade and other debtors are recognised at the settlement amount 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 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.

1.12 Creditors and provisions
Liabilities are recognised when there is an obligation at the Balance Sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably. Liabilities are recognised at the amount that the charity anticipates it will pay to settle the debt or the amount it has received as advanced payments for the goods or services it must provide. Provisions are measured at the best estimate of the amounts required to settle the obligation. Where the effect of the time value of money is material, the provision is based on the present value of those amounts, discounted at the pre tax discount rate that reflects the risks specific to the liability. The unwinding of the discount is recognised within interest payable and similar charges.

1.13 Pensions
The charity operates a defined contribution pension scheme, and the pension charge represents the amounts payable by the charity to the fund in respect of the year.

1.14 Critical accounting estimates and areas of judgement
Preparation of the financial statements requires management to make significant judgements and estimates. The key areas in the financial statements where these judgements and estimates have been made are as follows:

- depreciation on fixed assets;
- fair value of investments, and;
- grants accrued payable in more than one year.

2. Income from donations

	Unrestricted funds 2023 £	Restricted funds 2023 £	Total funds 2023 £	Total funds 2022 £
Donations	720	40,848	**41,568**	2,408
Grants	-	17,083	**17,083**	21,214
	720	**57,931**	**58,651**	**23,622**

In 2022, £720 was unrestricted and £22,902 was restricted.

3. Income from charitable activities

	Unrestricted funds 2023 £	Restricted funds 2023 £	Total funds 2023 £	Total funds 2022 £
Science CPD programme (STEM Learning Ltd)	212,588	-	**212,588**	**79,162**

4. Investment income

	Unrestricted funds 2023 £	Restricted funds 2023 £	Total funds 2023 £	Total funds 2022 £
Income from listed investments	519,878	-	519,878	479,143
Interest on bank fixed deposits	5,311	-	5,311	94
	525,189	**-**	**525,189**	**479,237**

In 2022, all investment income was unrestricted.

5. Other income

	Unrestricted funds 2023 £	Restricted funds 2023 £	Total funds 2023 £	Total funds 2022 £
Madoff Victims Fund Compensation	-	**-**	-	18,205

6. Investment management costs

	Unrestricted funds 2023 £	Total funds 2023 £	Total funds 2022 £
Investment manager's fees	553,859	553,859	447,225
Investment management fee rebate	(181,150)	(181,150)	(144,055)
	372,709	**372,709**	**303,170**

The rebate was negotiated by the trustees and is equivalent to a third of their 1.5% management fee charged to the Omnia Fund L.P. for dealing with the Fund's affairs. In 2022 all expenditure on investment management costs was unrestricted.

7. Analysis of expenditure

Analysis of expenditure: current year

	Direct costs 2023 £	Grant funding of activities (note 8) 2023 £	Support & governance costs (note 10) 2023 £	Total 2023 £	Total 2022 £
School Partnerships	786,225	353,887	452,219	1,592,331	1,171,783
Teacher Support	124,382	164,052	124,944	413,378	268,462
Teach Physics internships	1,324	44,385	33,292	79,001	85,133
Subject Knowledge for Physics Teaching (SKPT)	228,906	-	-	228,906	67,004
Ogden Outreach Officers	50,381	(9,505)	83,269	124,145	64,703
Grants	2,512	136,522	16,686	155,720	109,663
Bursaries and scholarships (note 9)	-	(34,500)	4,111	(30,389)	(8,215)
Other physics activities	70,141	46,150	83,269	199,560	176,118
Physics education activities	**1,263,871**	**700,991**	**797,790**	**2,762,652**	**1,934,651**
Other charitable purposes	-	123,306	8,303	131,609	107,451
All charitable activities	**1,263,871**	**824,297**	**806,093**	**2,894,261**	**2,042,102**
2022	839,062	582,578	620,462	2,042,102	

In 2022, charitable activities expenditure amounting to £26,334 was restricted.

The support and governance costs have been allocated to direct and grant making activities based on staff time spent. Total support costs allocated to grant activities is £301,492.

8. Grants payable

	2023 £	2022 £
Grants to institutions:		
Primary schools	231,270	194,612
Secondary schools	335,320	104,521
Universities	71,459	83,741
Organisations	78,575	142,774
Subtotal	**716,624**	**525,648**
Grants to individuals	107,673	56,930
Total	**824,297**	**582,578**

275 grants were awarded in 2023, compared with 215 grants in 2022.

Grants payable to institutions, net of write backs are as follows:

Primary schools	2023 £	2022 £
Abbey Village Primary School	5,500	-
Aldwyn Primary School	425	-
Ashton Gate Primary School	-	100
Avonmore Primary School	1,000	1,780
Bath & Wells Multi Academy Trust	6,000	-
Beacon Ace Academy	-	5,000
Bignold Primary School	325	-
Briar Hill Infant School	250	250
Brook Lodge Primary School	5,500	-
Chard Preparatory School	5,500	-
Charlton Primary School	5,000	5,500
Chestnuts Primary School	1,980	5,500
Christchurch Junior School	-	2,500
Cooper Perry Primary School	-	5,500
Copley Primary School	2,000	2,300
Daven Primary School	250	250
Denbigh Primary School	2,500	5,500
DRET Quay Academy	4,500	5,500
Dulverton Junior School	-	250
Durham Gilesgate Primary School	800	5,000
Errington Primary School	5,500	-
Essex Primary School	2,500	-
Falmouth Primary Academy	5,000	5,500
Ferndale Primary and Nursery School	2,230	2,480
Gaskell Community Primary School	-	250

Primary schools (continued)	2023 £	2022 £
Gayton Primary School	1,000	-
Gisburn Primary School	-	250
Greenway Primary School	6,770	-
Greswell Primary School and Nursery	150	-
Grimley & Holt Primary School	5,000	5,500
Gurnard Primary School	-	1,000
Hazeldene School	2,500	5,500
Hallam Primary School	-	2,500
Hartside Primary Academy	-	1,000
Hempshill Hall Primary School	5,500	-
Hertford St Andrew Church of England Primary School	250	-
Hollingworth Primary School	425	-
Holy Family RC School	2,500	-
Hopwood CP School	250	-
Kates Hill Primary School	5,500	-
Kernow Learning	2,500	-
Kessingland Church of England Primary Academy	5,500	-
Kings Ash Academy	2,500	3,870
Kingsland Church of England Primary School	250	-
Knowsley Lane Primary School	-	5,475
Ledbury Primary School	250	-
Little Sutton Primary School	250	-
Lunt's Heath Primary School	1,000	1,500
Medina Primary School	2,500	-
Middleton Church of England Primary School	-	2,500
Milton St John's Church of England Primary School	150	-
Montem Primary School	3,747	-
Moorpark Junior School	-	600
Mount Pleasant Junior School	3,150	-
Mylor Bridge School	200	-
Newby Primary School	-	400
Newsham Primary School	-	1,500
Okehampton Primary School	1,000	2,230
Oundle Church of England Primary School	2,230	2,105
Our Lady and Saint Kenelm Primary School	500	250
Our Lady of Mount Carmel Roman Catholic Primary School	150	250
Our Lady of Walsingham Catholic Primary	250	-
Oval Learning Cluster	2,500	-
Pakeman Primary School	-	972
Parochial CE Primary School	150	-

Primary schools (continued)	2023 £	2022 £
Pluckley Primary School	16,000	-
Red Oak Primary School	2,500	4,850
Richard Taylor Church of England Primary School	1,950	4,500
Rivers MAT	4,985	-
Rockingham Junior and Infant School	2,500	5,500
Rushton Church of England Primary School	(1,000)	5,500
Sandfield Close Primary School	5,500	-
Sandon Primary Academy	5,500	-
Sculthorpe Primary Academy	-	1,000
Sherford Vale Primary School	(649)	-
Sibsey Free Primary School	-	2,500
Silver Springs Primary Academy	6,000	12,000
Somerleyton Primary School	250	-
Springbank Primary School	(1,800)	250
St Agnes Church of England Primary School	500	2,300
St Alphege Junior School	250	250
St Andrew's and St Mark's Junior School	102	-
St Augustine's Catholic High School and Sixth Form Centre	4,450	-
St Christopher's Catholic Primary Academy	2,500	950
St Clare's Catholic Primary School	2,500	-
St Edward's Catholic Academy, Swadlincote	2,500	2,500
St Edward's Catholic Primary School, Sheerness	-	2,430
St George's Church of England Primary School	150	-
St George's Primary School	5,500	-
St John and St James Church of England Primary School	5,000	-
St Joseph's Catholic Primary School	6,150	-
St Laurence's Catholic Primary School	2,500	5,500
St Maria Goretti Catholic Academy	(2,000)	-
St Matthew's Catholic Primary School	1,650	5,000
St Pauls Church of England Primary School	1,505	5,000
St Peter’s Church of England Primary School	425	-
St Peters Catholic Primary School	150	-
St Peter's Elwick Church of England Primary School	1,170	5,500
St Peters Junior School	5,500	-
St Stephen Churchtown Academy	1,000	2,500
Stella Maris Catholic Primary School	2,500	2,500
Streatham Wells Primary	2,500	2,420
Sunnyhill Primary School	-	2,500
Sutton-in-Craven CP School	2,150	2,500
The Redstart Primary School	5,000	-

Primary schools (continued)	2023 £	2022 £
Trinity Primary Academy	250	-
Walford Nursery and Primary School	250	-
Walton Priory Middle School	1,750	4,500
Waterside Primary School	(1,500)	5,350
Whitehouse Common Primary School	-	250
Willenhall Community Primary School	5,000	5,500
Willow Brook Primary School Academy	6,750	-
Woodham Academy	5,500	-
Wybourn Community Primary School	2,500	5,000
Wyvil Primary School	-	5,500
Total	**231,270**	**194,612**

Secondary schools	2023 £	2022 £
Abraham Moss Community School	2,500	-
Alder Community High School	2,200	2,600
Alexandra Park School	8,493	-
Ark Schools	2,000	-
Ashton Community Science College	9,614	12,000
Beamont Collegiate Academy	-	1,460
Benenden School	2,500	1,860
Bideford College	(706)	2,160
Bishop Barrington Academy	11,831	12,000
Blackpool Aspire Academy	1,000	-
Blackpool Sixth Form College	1,000	2,500
Bonus Pastor Catholic College	2,500	6,000
Bridgwater College Academy	-	(1,120)
Brighouse High School	1,150	-
Brixton Learning Collaborative	184	2,450
Burlington Danes Academy	13,005	-
Cambourne Village College	16,581	-
Cardinal Newman Catholic School	500	-
Carre's Grammar School	-	117
Castle Manor Academy	-	1,500
Castle View Academy	(231)	1,510
Central Foundation Boys School	£1,800	-

Secondary schools (continued)	2023 £	2022 £
Chelsea Academy	1,700	-
Chilton Academy	12,000	-
Christopher Whitehead Language College and Sixth Form	3,000	-
Churchill Community College	6,805	-
City of London Academy Highbury Grove	1,450	-
Cleeve School	1,000	5,500
Consett Academy	2,750	1,850
Dagenham Park Church of England School	500	-
Dane Court Grammar School	13,729	-
Didsbury High School	1,750	1,200
Egglescliffe School	1,128	-
Elizabeth Garrett Anderson School	-	5,000
Energy Coast UTC	-	660
Exeter School	-	(250)
Fortsimere School	500	-
Fulneck School	-	(1,673)
Great Western Academy	5,500	-
Hadley Learning Community	2,500	2,500
Haggerston School	750	(3,242)
Helston Community College	1,750	-
Hills Road Sixth Form College	5,230	-
Hodgson Academy	11,611	-
Impington Village College	-	200
Island Academy, Antigua	25,000	-
Jesmond Park Academy	(1,671)	-
Kensington Aldridge Academy	-	1,000
King Edward VI Grammar School, Louth	10,432	-
King Edward VII Academy	2,500	4,500
Kingsbridge Community College	4,496	250
Liverpool College Independent School	100	-
Longridge Towers School	2,500	5,000
Longsands Academy	1,465	1,215
Lyndon School	5,000	-

Secondary schools (continued)	2023 £	2022 £
Maiden Erlegh School	5,000	-
Malcolm Arnold Academy	3,900	5,500
Marine Academy Plymouth	-	(117)
Merchant's Academy	2,002	-
Minsthorpe Community College	2,258	-
North East Learning Trust	1,000	-
Newquay Tretherras	6,802	-
North East Futures UTC	4,970	-
North Tyneside Learning Trust	16,000	-
Northampton International Academy	2,000	-
Nunnery Wood High School	(1,400)	1,400
Oldham Sixth Form College	-	250
Ormiston Academies Trust	2,500	-
Ormiston Sir Stanley Matthews Academy	3,500	-
Our Lady's RC High School	5,500	-
Parmiter's School	750	-
Pendleton Sixth Form College	1,000	-
Ponteland High School	-	500
Presdales School Academy Trust	5,500	-
Queen Elizabeth's High School	5,500	2,142
Sharples School	(400)	400
Sir John Leman High School	-	1,215
Skegness Grammar School	-	(167)
Skipton Girls' High School	5,000	-
Spires Academy	1,000	2,500
St Aidan's Church of England High School	-	(3,750)
St Edward's Catholic Academy	-	2,500
St John Fisher Catholic College	11,611	-
St Marylebone Church of England School	(440)	440
St Richard's Catholic College	-	1,000
Stewards Academy	-	1,000
Stratton Upper School	10,000	-

Secondary schools (continued)	2023 £	2022 £
Tapton School	2,000	-
The Academy at Shotton Hall	-	3,500
The Cotswold School	5,500	-
The Gatwick School	-	(864)
The Grangefield Academy	1,500	-
The King's School (Grantham)	2,500	2,500
The Kingsbrook School	5,500	-
The Mounbatten School	-	2,500
The Priory Academy LSST (Lincoln)	5,000	2,370
The University of Birmingham School	6,631	-
The Whitby High School	2,450	5,000
Truro School	(2,149)	-
Urmston Grammar School	(205)	705
Wardle Academy	1,700	4,900
Wellington School Timperley	11,269	-
West Kirby Grammar School	675	-
Workington Academy	-	350
Total	**335,320**	**104,521**

Universities	2023 £	2022 £
Cardiff University	-	(1,350)
Durham University	20,275	3,000
Harvard Business School	28,664	8,881
Keele University	(2,678)	3,000
King's College London	1,460	-
Lancaster University	-	1,020
Newcastle University	(3,000)	(1,217)
Northumbria University	-	(47)
Royal Holloway University of London	25	(4,549)
Sheffield Hallam University	250	12,660
The Open University	290	1,125
University College London	-	39,750
University of Bath	-	(9,306)
University of Birmingham	-	37,650
University of Bristol	2,400	2,400
University of Cambridge	9,584	10,000
University of Chester	2,250	-
University of Edinburgh	-	(6,308)
University of Hertfordshire	-	(4,557)
University of Kent	-	1,373
University of Leeds	5,000	(1,356)
University of Lincoln	(87)	(1,796)
University of Liverpool	5,000	-
University of Manchester	7,550	12,000
University of Nottingham	-	(21,667)
University of Sheffield	(5,123)	1,500
University of Surrey	-	(1,500)
University of Worcester	-	35
University of York	(401)	3,000
Total	**71,459**	**83,741**

Organisations	2023 £	2022 £
1851 Trust	-	10,000
ARC and You	4,495	-
BM Schools Out UK	-	1,000
Bolton Playing for Success	5,000	-
Cambridge Hands-On Science (CHaOS)	-	5,000
Cambridge Science Centre	5,000	-
Discovering42 CIC	9,764	-
Founders4Schools	4,000	5,000
HMDT Music	4,500	4,750
Institute of Physics	-	15,000
Links to a Life	-	4,900
Mahdlo (Oldham) Youth Zone	-	4,000
Mustaqbill (Future) Foundation	-	5,000
National Science and Media Museum	5,000	-
National Youth Agency	-	(2,000)
Real Photography CIC	5,000	-
Rochdale Science Initiative CIC	10,000	-
Royal Trinity Hospice	(5,000)	-
SATRO	-	3,500
SHINE	-	75,000
Success4All CIO	5,000	-
Teachometer	(1,624)	1,624
The Blackett Lab Family	5,000	-
The Clement James Centre	5,000	-
The Living Paintings Trust	3,500	-
The Maternity Teacher Paternity Teacher Project	1,970	-
The Spencer Steadman Trust	-	10,000
Toranj Tuition	5,000	-
Turtle Key Arts	4,970	-
Wiltshire Music Centre	2,000	-
Total	**78,575**	**142,774**
Grants to individuals	107,673	56,930
Total grants	**824,297**	**582,578**

A reconciliation of the grants payable and grant commitments figures shown in these accounts is as follows:

	2023 £	2022 £
Grant commitments at 1 September 2022	566,634	837,714
Commitments made in the period net of grants released	858,797	594,578
Grants paid during the period	(965,634)	(865,658)
Total	**459,797**	**566,634**

Grant commitments at 31 August 2023 are payable as follows:

	2023 £	2022 £
Within one year (included with note 16)	351,592	494,187
After more than one year (included with note 17)	108,205	72,447
Total	**459,797**	**566,634**

9. Bursaries and scholarships

During the year ended 31 August 2023, the Trustees did not commit any bursaries or scholarships and these programmes will not be offered in the future. The final scholarships have now been completed and so the remaining £34,500 brought forward bursaries and scholarships commitment has been written off.

A reconciliation of the bursaries and scholarships payable and commitments figures shown in these accounts is as follows:

	2023 £	2022 £
Bursaries and scholarships commitments at 1 September 2022	36,000	73,500
Bursaries and scholarships write-off (see above)	(34,500)	(12,000)
Total bursaries and scholarships payable:	1,500	61,500
Scholarships paid during the year	(1,500)	(25,500)
Bursaries and scholarships commitments at 31 August 2023	**-**	**36,000**

Bursaries and scholarships commitments at 31 August 2023 are payable as follows:

	2023 £	2022 £
Within one year (included with note 16)	-	36.000
Total	**-**	**36,000**

10. Support costs

	Total 2023 £	Total 2022 £
Staffing costs		
Wages, salaries and medical insurance	485,923	320,886
National insurance	44,154	28,325
Pension costs	24,917	17,181
Recruitment costs	4,601	3,995
Staff training and development	11,945	29,041
Consultancy costs	39,683	7,775
Subtotal	**611,223**	**407,203**
Office costs		
Office rental and costs	125,113	125,375
Printing, postage and stationery	1,611	4,087
Web and digital	6,379	19,175
Publications and promotional materials	9,701	3,499
Travel expenses	7,363	2,326
Depreciation and loss on disposal of assets	5,912	1,340
Payroll and other fees	1,297	1,379
Accountancy fees	26,483	27,613
Subtotal	**183,859**	**184,794**
Governance costs		
Legal fees	2,636	15,845
Audit fees	7,500	12,620
Trustee expenses	875	-
Subtotal	**11,011**	**28,465**
Total	**806,093**	**620,462**

These costs have been apportioned to the charitable activities according to the amount of staff time spent on them.

11. Net expenditure

This is stated after charging:

	2023 £	2022 £
Depreciation of tangible fixed assets – owned by the charity	5,912	1,340
Auditor's remuneration – audit	6,250	8,000
Pension costs	24,917	17,181
Operating lease costs	76,523	85,134

12. Trustee remuneration and expenses and the cost of key management personnel

Staff costs were as follows:

The average number of persons employed by the charity during the year was as follows:

	2023	2022
Charitable activities	16	11

The numbers of employees whose emoluments during the year fell within each band of £10,000 from £60,000 upwards were as follows:

	2023	2022
In the band £60,000 – £70,000	-	1
In the band £70,000 – £80,000	1	-

As at 31 August 2023, £1,195 was owed by the Trust in relation to the pension scheme (2022: £2,086).

No trustees received reimbursement of expenses or benefits in the year.

The key management personnel of the charity comprise the Trustees and Chief Executive. The Trustees all give their time and expertise without any kind of remuneration or other benefit in kind (2022: £Nil). The total employment benefits, including employers NI of key management personnel over the year was £93,793 (2022: £81,338).

13. Tangible fixed assets

	Computer equipment £	Total £
Cost		
At September 2022	23,287	23,287
Additions	19,481	19,481
At 31 August 2023	**42,768**	42,768
Depreciation		
At 1 September 2023	12,725	12,725
Charge for the year	5,912	5,912
At 31 August 2023	**18,637**	**18,637**
Net book value		
At 31 August 2023	**24,131**	**24,131**
At 31 August 2022	10,562	10,562

14. Fixed asset investments

	Listed securities £	Cash held for investment purposes £	Total £
Market value			
At 1 September 2022	64,751,554	1,035,854	65,787,408
Additions	177,285		177,285
Disposals (proceeds £3,198,423, realised gain £509,767)	(2,688,656)	-	(2,688,656)
Other cash movements	-	813,697	813,697
Revaluations / currency gains	1,215,700	(184,393)	1,031,307
Investment management fees	(553,859)	-	(553,859)
At 31 August 2023	**62,902,024**	**1,665,158**	**64,567,182**
Historical cost	**11,537,562**	**1,665,158**	**13,202,720**

All the fixed asset investments are held in the UK.

All investments are carried at their fair value. Investment in equities and fixed interest securities are all traded in quoted public markets, primarily the London Stock Exchange. Holdings in common investment funds, unit trusts and open ended investment companies are at the bid price or the NAV of the fund. The basis of fair value for quoted investments is equivalent to the market value, using the bid price. Asset sales and purchases are recognised at the date of trade at cost (that is their transaction value).

The Charity manages the investment portfolio themselves and regularly consults with market professionals on its investment strategy. The Charity is operating an investment policy that provides for a degree of diversification of holdings within different unit trust investments. The sole purpose of the investment strategy is to fund the annual expenditure of the Trust. The Charity has invested in a number of unit trusts in order to protect the Charity's exposure to volatility in the market and seek low risk investments wherever possible. The Investment Strategy is designed to seek absolute returns on its investments and does not differentiate between income arising from Interest and dividends or capital growth on its investments in its funding decisions.

All funds have monthly liquidity and the Trust regularly liquidates part of its Fund investments at the monthly NAV value to meet the expenditure of the Trust. The Trust makes investments both in Sterling and US dollars and from time to time hedges its foreign currency exposure.

The Charity does not make use of derivatives and similar complex financial instruments as it takes the view that investments are held for their longer-term growth and annual income.

The Charity has no material investment holdings in markets subject to exchange controls or trading restrictions.

15. Debtors

	2023 £	2022 £
Amounts due in more than 1 year:		
Rent deposit	19,410	19,410
Amounts due in less than 1 year:		
Trade debtors	12,000	32,260
Rebate of external management fees	13,000	11,000
Other debtors	29,891	31,007
Prepayments and accrued income	97,652	37,355
Total	**171,953**	**131,032**

16. Creditors: amounts falling due within one year

	2023 £	2022 £
Trade creditors	19,506	13,496
Other taxation and social security	17,252	12,606
Grants payable (note 8)	351,592	494,187
Bursaries and scholarships payable (note 9)	-	36,000
Other creditors	7,129	6,860
Accruals	82,834	58,115
Total	**478,313**	**621,264**

17. Creditors: amounts falling due after more than one year

	2023 £	2022 £
Grants payable (note 8)	108,205	72,447
Bursaries and scholarships payable (note 9)	-	-
Total	**108,205**	**72,447**

18. Reconciliation of cash

Reconciliation of net movement in funds to net cash flow from operating activities

	2023 £	2022 £
Net (expenditure)/income for the year (as per Statement of Financial Activities)	(929,468)	5,821,354
Adjustments for:		
Gains on investments	(1,800,912)	(6,977,323)
Dividends and interest from investments	(525,189)	(479,237)
Depreciation	5,912	1,340
Increase in debtors	(40,921)	(25,116)
Decrease in creditors	(107,193)	(294,799)
Net cash used in operating activities	**(3,397,771)**	**(1,953,781)**

19. Analysis of cash and cash equivalents

	2023 £	2022 £
Cash in hand	195,233	66,158
Total cash and cash equivalents	**195,233**	**66,158**

20. Analysis of changes in net debt

	At 1 September 2022 £	Cash flows £	At 31 August 2023 £
Cash at bank and in hand	66,158	129,075	195,233

21. Statement of funds

Statement of funds: current year

	Balance at 1 September 2022 £	Income £	Expenditure £	Gains/ (Losses) £	Transfers £	Balance at 31 August 2023 £
General funds						
General fund	65,304,881	738,497	(3,224,591)	1,541,074	-	64,359,861
Restricted funds						
Energy Internships	(3,750)	30,470	(26,720)	-	-	-
STEM Enrichment Partnership	318	10,416	(5,281)	-	-	5,453
Spacelink Learning Foundation	-	10,378	(10,378)	-	-	-
British Science Association Student Ambassadors	-	6,667	-	-	-	6,667
Total restricted funds	**(3,432)**	**57,931**	**(42,379)**	-	-	**12,120**
Total funds	**65,301,449**	**796,428**	**(3,266,970)**	**1,541,074**	**-**	**64,371,981**

Statement of funds: prior period

	Balance at 1 September 2021 £	Income £	Expenditure £	Gains/ (Losses) £	Transfers £	Balance at 31 August 2022 £
General funds						
General funds	59,480,095	577,324	(2,318,938)	7,566,400	-	65,304,881
Total Unrestricted funds	59,480,095	577,324	(2,318,938)	7,566,400	-	65,304,881
Restricted funds						
Energy Internships	-	1,688	(5,438)	-	-	(3,750)
Isle of Wight Primary Science	-	21,214	(20,896)	-	-	318
		22,902	(26,334)			(3,432)
Total funds	**59,480,095**	**600,226**	**(2,345,272)**	**7,566,400**	**-**	**65,301,449**

Purpose of funds

Energy Internships – The Energy Internships restricted fund is for donations towards the cost of the internships programme from host industries. The funding will be spent on student bursaries.

STEM Enrichment Partnership – this fund supports science, technology, engineering and mathematics (STEM) Clubs and space activities within UK schools, improving the quality of teaching and inspiring young people to pursue a STEM-related career.

Spacelink Learning Foundation – this fund is to be spent on space education activities in the Northeast.

British Science Association Student Ambassadors – this fund is to support a project in the Northeast, including mentoring of younger students, running of CREST clubs and achievement of CREST awards.

22. Analysis of net assets between funds

Analysis of net assets between funds: current year

	Unrestricted £	Restricted £	Total £
Tangible fixed assets	24,131	-	24,131
Investments	64,567,182	-	64,567,182
Net current liabilities	(123,247)	12,120	(111,127)
Long-term liabilities	(108,205)	-	(108,205)
Total funds	**64,359,861**	**12,120**	**64,371,981**

Analysis of net assets between funds: prior period

	Unrestricted £	Restricted £	Total £
Tangible fixed assets	10,562	-	10,562
Investments	65,787,408	-	65,787,408
Net current liabilities	(420,642)	(3,432)	(424,074)
Long-term liabilities	(72,447)	-	(72,447)
Total funds	**65,304,881**	**(3,432)**	**65,301,449**

23. Operating lease commitments

At 31 August 2023, the total of the charity's future minimum lease payments under non-cancellable operating leases was:

	2023 £	2022 £
Amounts payable		
Within 1 year	-	12,940
Between 1 and 5 years	-	-
Total	**-**	**12,940**

24. Related party transactions

During the year, grants totalling £Nil (2022: £75,000) were paid to SHINE: Support and Help in Education. Cameron Ogden is a Trustee of this organisation.

Reference and administrative details of the charity

Trustees
Cameron Ogden (Chair)
Sir Peter Ogden
Lady Ogden
Tiffany Chawner
Edward Ogden
Tim Simmons

Charity registered number
1037570

Principal office
The Phoenix Brewery
13 Bramley Road
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W10 6SP

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Independent auditors
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Bankers
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The Ogden Trust

making physics matter

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Registered charity: 1037570

THE OGDEN TRUST

England & Wales - Charity number 1037570

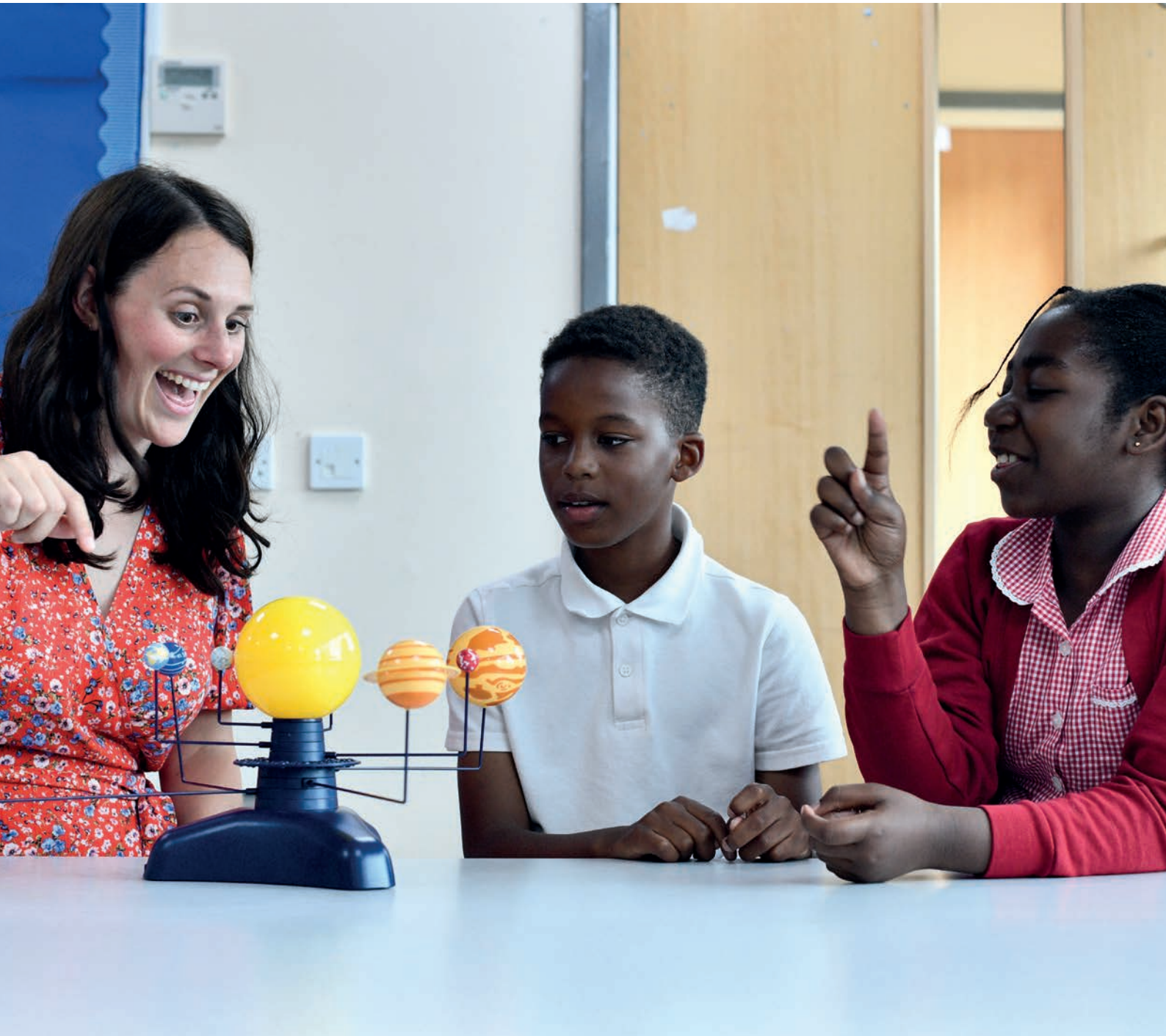
Accounts

The Ogden Trust

making physics matter

Trustees' report and financial statements

for the year ended 31 August 2022



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Reference and administrative details of the charity **inside back cover**

Cover photograph: Exploring the solar system with Phizzi Earth and Space CPD. Phizzi CPD covers the main areas of the primary science curriculum (physical processes) over a four year cycle. It is available to all primary schools in our partnership programme.

Back cover photograph: Teachers from the Ogden Partnership network gathered for the annual conference which was held at The Belfry in Birmingham in 2022. More than 120 teachers and colleagues joined us over the two days to learn from expert practitioners and to share ideas, enthusiasm and expertise.

Welcome from Chair and Chief Executive

The schools and teachers that we work with across our programmes always impress us with their dedication, enthusiasm and commitment to inspiring the next generation. Confident, engaging delivery of physics in the classroom will help to enable young learners to understand how the world works and how they can contribute to it.

This year we have joined forces with STEM Learning and the Association for Science Education in a new national Science CPD Partnership, funded by the Department for Education. The Partnership, led by STEM Learning, is bringing together our collective expertise to improve teachers' access to career-long, science-specific continuing professional development (CPD). As part of the partnership, we are delivering Subject Knowledge for Physics Teaching (SKPT) CPD to support non specialist teachers of physics. We are working with a fantastic network of physics coaches across England and have a SKPT team within Teacher Support to build this growing programme.

We remain committed to our strategy for 2021–26, reiterating our mission to enhance the teaching and learning of physics. To help us achieve this, we have expanded our network of staff, consultants and physics coaches. It seems inevitable that the coming year will present new challenges for many that we work with, but we will continue to develop our programmes to make them accessible to those who find themselves most disenfranchised from physics and the opportunities it can bring.

We are looking forward to the next year and will work hard to develop our programmes and put our strategic objectives into practical action.

Cameron Ogden
Chair of Trustees

Clare Harvey
Chief Executive

Our strategy

The Ogden Trust is a family charitable trust which supports the teaching and learning of physics. The Trust delivers programmes primarily for schools and teachers, as well as working with universities, community groups and employers.

Increase the uptake of physics post-16 by supporting physics education and engagement for all young people (4-18), particularly those in under-represented groups.

School-led partnerships to build

- supportive, collaborative teaching communities
- improvement in physics education & engagement
- enrichment opportunities
- strong environments for physics learning

Support for teachers of physics to provide

- ongoing ptofessional development
- understanding, knowledge & teaching tools
- inspiration, skills & resources for practical physics
- a sense of appreciation & value

Physics opportunities for all through

- leadership, action & ideas
- working with universities, employers & community groups
- equitable access to physics-related enrichment
- understanding & experiencing career pathways from physics

The Trust is working hard to deliver its strategy for 2021–26, which was officially launched last year. It reiterates our determination to enhance the teaching and learning of physics, and consolidates our commitment to challenging stereotypes, expanding access and opportunities, and making physics matter to more people – especially those who are most disenfranchised.

Our programme of teacher support and our continuing professional development (CPD) portfolio has expanded significantly this year and the Trust is now part of a national Science CPD Partnership which brings it into formal alliance with STEM Learning and the Association for Science Education. With funding from the Department for Education, the Science CPD Partnership is bringing together our collective expertise to improve teachers' access to career-long, science-specific CPD.

Within the CPD Partnership, the Trust is delivering a programme of Subject Knowledge for Physics Teaching (SKPT) for non-specialist teachers. Physics teacher recruitment and retention remains a national concern – supporting teachers to improve

their physics subject knowledge and confidence helps to positively change the physics learning landscape for students and will hopefully encourage teachers to remain in the profession. SKPT is an exciting addition to our Teacher Support programme and our CPD portfolio.

In our School Partnerships programme, we are building our efforts to work with more schools, established education collaborations and across regions to help bring about real and sustained change in physics education. With the growth of more education trusts and multi-academies we have adapted our programmes to ensure we can effectively work with these groups of schools.

> "It's probably fair to say that I don't think I'd be a teacher if The Ogden Trust didn't exist. I wouldn't have really known how to become one if I hadn't met the Ogden Outreach Officer at my university; and I may well have left the profession if I hadn't had the Ogden Trafford Partnership to speak to. I think a lot of the stuff The Ogden Trust does has an impact beyond what can be measured."
>
> **Dan Walker**
> Didsbury Partnership Co-ordinator (2020–)
> Teach Physics Intern (2015)

Whilst schools and teachers remain our principal focus, we are supporting teaching, learning and physics opportunities that go beyond the boundaries of the classroom. Our relationship with universities has evolved as funding for the Outreach Officer programme comes to an end; however, through a growing university network, we are continuing to support physics outreach and enabling wider access to university physics.

Fundamental to our strategy and to our programmes and provision is equity, diversity and inclusion. We are addressing any systemic barriers in our programmes and events; ongoing care and increased awareness and understanding is helping us to mitigate barriers to participation, and ensures we take a proactive, strategic approach to inclusion, equity and accessibility. Our new accessibility and inclusion advisory panel, which includes people with expertise and lived experience, is now meeting regularly and advising the Trust on how to make our programmes more inclusive.

Priority actions

We will be working to grow The Ogden Trust profile and the reach of our programmes to enable more teachers to benefit from the support and opportunities that we provide.

We will be developing the evidence-base for our programmes and aiming to share our findings, practice and expertise more widely.

We are looking at ways to embed and progress inclusion and diversity across the organisation, dismantling any barriers that may exist and ensuring we provide an open and welcoming space both within the Trust and across our programmes and events.

Public benefit

The Trustees have assessed the disclosures made in the Trustees' report and consider that these sufficiently detail the significant activities undertaken in order to carry out the charity's aims for the public benefit. When planning the charity's activities, the Trustees have given regard to the Charity Commission's guidance on public benefit. The Trust's programmes in physics education are beneficial as they are for the advancement of science and education. The majority of the programmes are open application and are therefore available to the majority of schools and teachers in England, meeting the criteria that they must benefit a sufficient section of the public.

Our achievements: 2021–22

111
partnerships

790
partnership events

865
schools in Ogden partnerships (699 primary, 166 secondary)

Partnership events reached
172,855
people

Science Talk

142
early years practitioners

Phizzi Light and Sound CPD
745
teachers

KS3 Physics CPD
173
teachers from 85 schools

Early career support for

255
teachers or trainee teachers

Primary science support for
346
teachers, trainee teachers or teaching assistants

45
university physics outreach practitioners in our network

42
Teach Physics interns at 33 schools

£85,524
awarded in 19 physics education grants

School partnerships

The Ogden School Partnerships programme operates from Early Years Foundation Stage (EYFS) through to the end of secondary education, addressing the transitions at each key stage. The programme works predominantly with local clusters of schools and established collaborations, such as multi-academy trusts. However, our Tameside Regional Partnership is now well-established, and we will continue to evaluate and evolve this place-based partnership approach.

Our partnerships work across the phases to encourage sharing of ideas, resources and expertise. The Trust encourages and facilitates schools to focus on:

- teacher professional development to help improve the teaching of physics; inspiring and committed teachers, secure in their subject knowledge, can inspire their students to take physics further.
- the wider learning environment, including support for technicians and teaching assistants, and investment in physics learning spaces and resources, all which help to develop and embed a culture of science.
- enrichment through family and community group engagement, and networking with local employers to provide a range of broader physics experiences for pupils and enhance science capital.

Partnerships receive four years of funding with a further year of transition support to foster sustained partnership activity. A time buy-out for partnership co-ordinators facilitates the initial partnership set-up, co-ordination and reporting, ensuring a firm foundation from which partnerships can build.

There were 111 funded partnerships in the programme in 2021–22, involving 865 schools (699 primary, 166 secondary).

Our Ogden partnership has allowed us to build a collaborative teaching community in which non-specialist primary teachers have gained a real confidence in the delivery of the physical sciences. The enrichment opportunities offered within our community have increased science capital; and science, in particular physics, has been made more relevant and more accessible to the students and their parents. Joining The Ogden Trust has raised the profile of physics and a lot more students are seeing science-related careers that they would like to pursue far earlier in their learning journey.

Everton McClymont
Lewisham Partnership (2020–)
Bonus Pastor Catholic College

Twenty-three of these partnerships officially launched at the start of the 2021 academic year. In October 2021, more than 30 partnership co-ordinators gathered in Stratford-upon-Avon to meet the Ogden team and counterparts from other school partnerships. This meeting was the third national induction meeting for partnerships, and the first significant in-person activity for teachers offered by the Trust in two years. Co-ordinators from the 2021 partnership cohort were joined by Year 2 partnership co-ordinators who shared their experience and ideas. The meeting provided a thorough understanding of the programme, and advice on how to develop efficient processes, deliverable plans and a sustainable partnership.

More than 82 per cent (19/23) of our new partnerships took a time buy-out (limited funding for half a day a week off timetable to lead the partnership). This is an increase on the previous year and an important step towards building effective and sustainable partnerships.

Our network of regional representatives has been actively recruiting for new partnerships in rural and coastal areas, and in areas of social deprivation. In these areas, young people may face one or more barriers to participation in science including lack of local opportunity, lack of local jobs and lack of role models in science and scientific careers.

Joanna organised a partnership egg drop challenge.

As partnership co-ordinator the time buy-out has been invaluable – it has helped me to plan, lead and build the partnership in our first year, in spite of inevitable challenges along the way, and it has helped me to set the foundations for delegation in year two. It has been an absolute honour to have this time – my confidence has grown, and I have developed my leadership skills. Leading the partnership can be hard work but it is definitely worth it. I feel lucky to be part of such a supportive network and it has made me fall in love with physics!

Joanna Burton
Bletchley Partnership (2021-)
Chestnuts Primary School

Partnerships recruited for 2021–22 were assessed and considered under various indicators of disadvantage. Twenty-eight per cent of students across our new year one partnerships were eligible for free school meals; recruitment of new partnerships with greater than average Free School Meals (FSM6%) increased by eight per cent on the 2020–21 intake.

More than 120 teachers and colleagues attended our two-day partnership conference to learn from expert practitioners and to share ideas, enthusiasm and expertise. The theme for the conference was space and 'wow how now' was at the heart of the sessions – looking at how students can be engaged with a 'wow', whilst understanding the 'how' of the science and the 'now' of real-life applications and careers. Delegates appreciated "the buzz and passion in the room for the common goal of ensuring inclusion and engagement for all in physics capital."

To ensure we could work effectively with the increasing number of multi-academy trusts and larger federations of schools, we ran a pilot programme for **established collaboration partnerships**. After a successful pilot period, this was formalised in 2021. The first round of open applications took place in 2021–22 and 12 new established collaboration partnerships will be starting in September 2022; they will join our pilot partnerships which will be entering their third year.

Students from the Ogden Ark Partnership visited Culham to get a better understanding of real-world fusion physics.

One of the main aims of our Ogden Ark Partnership is to increase the number of students taking physics at GCSE, A-level and at university, particularly for under-privileged and under-represented students. We have been able to run CPD during our network days and have discovered lots of talent and knowledge within our network! We are now trying to capture and utilise this talent to empower our A-level physics teachers to have more impact in their schools.

We have used Ogden funding to start a STEM club which is now self-running and self-perpetuating: Year 12 students pick up where the Year 13 students have left off and continue to build the project. Students are learning lots of skills and it has given them great content for their UCAS statements.

Around 50 per cent of the current ARK Year 12 (2021) physics A-level cohort are applying for a physics course at university and others are going for engineering and computer science. We are really pleased to see our students continuing their STEM journey. Our Ogden partnership helps us to raise awareness and understanding of careers and opportunities from physics, as well as raising the profile of physics across the Academy and hopefully encouraging more students to take physics further.

Ragavan Nagaratnam
ARK Established Collaboration Partnership (2020–)
ARK Globe Academy

This partnership is part of our pilot cohort.

The **Tameside Regional Partnership** launched in 2021 and after a difficult start with lockdowns and COVID restrictions, it is now establishing firm roots in the area with increased engagement from schools and momentum building. Under the leadership of two Ogden-funded co-ordinators, there are now 28 primary schools actively and regularly involved in the partnership; they are divided into three local clusters so they can more easily work together to achieve their agreed priorities and objectives.

Across the primary schools there is focus on transition, science capital and family/community engagement in science learning; 10 schools achieved the Primary Science Quality Mark (PSQM) this year with the support of Ogden funding. Secondary schools have been more reticent in their involvement with the partnership, however, engagement is increasing and more schools are showing interest in the CPD and resources available to enhance secondary physics provision. Sixth form ambassador programmes are in development and will help to build links and opportunities across the phases, supporting transition and subject knowledge.

Across the Tameside Partnership, primary teachers have been taking part

in Ogden CPD, securing their knowledge, pedagogy and increasing their classroom confidence. Teachers from 42 primary schools have taken part in Phizzi CPD in Tameside this year – following this CPD we conservatively estimate that these ideas, learning and resources could reach more than 9,000 children across those schools.

Of the 141 areas in Tameside, 11 fall within the most deprived five per cent nationally and a further eighteen within the most deprived 10 per cent nationally. In total, 13.4 per cent of Tameside residents live in income-deprived households.*

Professional development

Ogden continuing professional development (CPD) is an important component of the partnerships programme with development opportunities available for teachers from EYFS through to KS4 (Year 11).

Our early years CPD, Science Talk, is now an online programme to make it easier for more teachers and teaching assistants to attend. One hundred and forty-two early years practitioners took part in a Science Talk session in 2021–22, each participating school received resource cards to support the practical hands-on activities in their setting, developing communication and language skills through science enquiry.

In the academic year 2021–22, 114 Phizzi Light and Sound CPD sessions were held for primary schools in our partnerships. The events reached 745 teachers from 520 schools, meaning that more than 74 per cent of our primary partnership schools took part in the Light and Sound CPD. Overall, on a 1-10 scale, teachers attending the sessions showed a 2.9 point increase in confidence in working scientifically and a 3.2 point rise in their knowledge of light and sound.

Phizzi CPD

To ensure that progression continues from primary into secondary, teachers in the first year of a partnership can take part in **KS3 Physics** – a CPD programme for non-specialist teachers which focuses on the key physics concepts and pedagogical approaches. One hundred and seventy-three secondary teachers from 85 schools signed up for termly-twilight CPD sessions which covered the topics of forces, waves and electricity. The sessions were run by regional mentors and helped to build local networks of practice. The sessions provided engaging and challenging classroom approaches, and each topic included a supporting box of resources and books so that teachers could easily take the new ideas straight into the classroom.

The biggest impact within the partnership has come from our development of the physics curriculum through KS3 to KS4, and in raising the profile of physics right through from KS2 with the Phizzi CPD, which has provided our partner primary teachers with more confidence in not just delivering physics, but also inspiring our young people.

Natasha Hargreaves
North East Learning Hub Established Collaboration Partnership (2020–)
Shotton Hall Academy

*www.tameside.gov.uk/ demographic-information

"Clear easy to understand explanations; fantastic resources and practical hands-on experiences."

"It was really useful how you adapted the sessions to exactly what was needed within the group – would highly recommend."

KS3 Physics

CPD available to all partnership schools

EYFS Science Talk
A half-day online CPD session to support communication and language through understanding the world

Phizzi CPD
A four-year ycle of primary science CPD

2022/23: Earth & Space	2023/24: Electricity	2024/25: Forces	2025/26: Light & Sound

KS3 Physics CPD
Physics input, collaborative planning and reflection, resources

Forces	Waves	Electricity

Primary schools in Year 5 partnerships can take part in Phizzi Forward which provides an opportunity for schools to consolidate and review how their Phizzi CPD is being implemented, how the resources are being used and how teaching and learning has improved.

School culture

Building a culture of science within schools, with positive environments for physics learning and supportive and collaborative teaching communities is important to developing the physics learning landscape. The wider learning environment, including support for technicians and teaching assistants, and investment in physics learning spaces and resources, is an integral part of our partnership programme.

After a successful first year, each school partnership with more than one primary school has the opportunity to open a Phiz Lab, creating a primary science environment to support teachers and engage pupils. The Phiz Lab programme is part of our ongoing strategy to help raise the profile of science, enhance pupil science capital and develop working scientifically skills.

There are now 53 Phiz Labs in schools across England and 24 Phiz Lab on Wheels (a dedicated science trolley equipped with resources to support classroom physics and STEM clubs in schools that do not have the space for a classroom lab). Seven of these Phiz Labs have been officially opened since September 2021, with grants awarded to a further seven schools. Funding has been agreed for more than 50 additional Phiz Labs on Wheels.

Technicians in secondary schools in Ogden partnerships have access to support from two Ogden technician leads. As well as sharing news and information across the Ogden network, their roles typically involve visits to schools to deliver on-site workshop training days and bespoke physics equipment training.

Enrichment

At the time of writing, over 90 per cent of our partnerships in Years 1–5 have reported on their partnership programmes; a total of 790 activities/events took place in 2021–22, the highest ever reported, with a spend of £148,327. Although some online/hybrid

We opened our Phiz Lab in May 2022. It is used for lessons by St Peter's pupils and those from partnership schools. The lab hosts staff professional development and a range of community science events have also taken place.

Pupil science ambassadors helped us plan the Phiz Lab and our current team are helping us to raise the profile of science within our school community. They deliver playground science activities at lunchtime, hand out resources and support children to complete enquiry-based science. The lab also hosts weekly science club sessions which are oversubscribed. A science spectacular day organised for October 2022 will hopefully reach 135 Year 2 children from across the partnership and a further 350 children from other schools.

The lab has been a huge success and has really helped to promote a love for science in our school and the wider community that we will continue to build upon in the future.

Nathan Williams
Kent North Coast Partnership (2019–)
St Peter's Junior School

activities have taken place, partnerships have been returning to face-to-face interactions and have reached a reported 172,855 participants including students, families, teachers, technicians, teaching assistants and the wider community. This year's events have seen a significant increase in family involvement with parent/carer participation almost doubling.

Partnership activities are reported across five categories: enrichment, CPD, working with families, attainment and careers awareness. Enrichment events comprise 37 per cent of partnership activities and include (amongst others) transition events (between primary and secondary schools), science fairs, science libraries, science ambassador schemes, stargazing nights and space camps. Post-pandemic, family learning nights are featuring prominently in partnership activities, and we have this year seen a taskmaster event, a physics escape room and mastermind.

Partnership activities

Participants	**2021-22**
EYFS	9,013
KS1	30,933
KS2	80,292
KS3	17,027
KS4	6,602
KS5	546
Teachers	6,004
Technicians/teaching assistants	1,057
Parents/carers	20,980
Community/other	401
Total	**172,855**

Twenty-four legacy partnerships of a possible 29 reported on activities supported by the Trust this year. These partnerships ran 106 events for 451 schools totalling 21,049 participants.

We have used our Ogden funding for activities that will be sustainable once the partnership enters its legacy phase – our sixth form science ambassadors support our primary CREST awards; and we have developed science libraries that we share across the partnership schools. Each year we select pupils to be our primary science leaders. They help to deliver assemblies, run competitions and update our science displays. We now host our own end of year science awards, recognising the fantastic achievements of our students.

We are also introducing space camps across the partnership; if every school runs a space camp we will have around 50 events each year which would be fantastic. We have already held two Year 3 camps which included a whole day of space related activities, an evening of stargazing followed by a space film, and then in the morning a celebration assembly hosted by our science leaders.

Matt Crook
Halton Partnership (2019–)
Lunt's Heath Primary School

Schools are encouraged to work towards a sustainable partnership, developing activities, resources and ideas that can be continued once the full partnership funding has ended. The Trust encourages and supports activities that develop students' science capital, increase careers awareness and enhance engagement with families and the local community.

Secondary schools in current or legacy partnerships are eligible to apply for funding to support students to attend trips to CERN. The funds are directed to support those students would otherwise be least able to participate, due to their financial circumstances.

Trips to CERN are educational and inspirational. As well as giving students (and their accompanying teachers) a greater understanding of the particle physics involved in world-class research, CERN showcases a range of careers connected to physics and students can use their experience to inform future education and career choices. This year, seven CERN grants totally £6,190 were successfully awarded, with trips taking place throughout the 2022–23 academic year – 156 students are expected to take part in these visits, with approximately 60 of them receiving direct support to enable their participation.

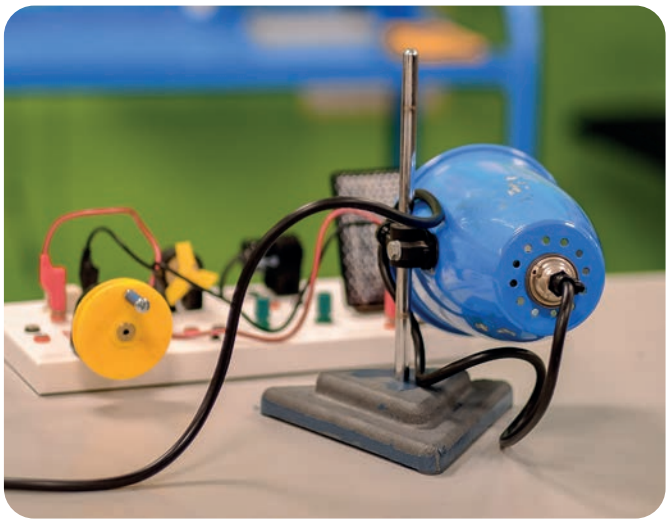
Priority actions

We will continue to review and evaluate our partnership model to ensure we can work effectively with education trusts and local clusters of schools. The effectiveness of our regional place-based model will also be monitored.

Our Science Talk CPD for EYFS will be relaunched in October 2022, using picture books to engage young learner in hands-on investigations to help them understand the world around them. The updated Science Talk provision will embed ideas to support inclusion and accessibility.

We will be moving to a new partnership transition model – as partnership end their funded period and move into their legacy phase, they will be realigned with our Teacher Support programme to ensure they continue to receive active support and access to opportunities.

We will be piloting technician training days in partnership with CLEAPSS (one day for beginners and another for experienced technicians) to further their skills and support them with difficult equipment.



Community and connection

The Didsbury Partnership (2020–) is a large local cluster located in and around the south of Manchester. It comprises mostly secondary schools and sixth-form colleges, a number of which are situated in some of the most deprived urban areas of the country.

As a lone physicist at the newly opened Didsbury High School in 2019, Dan Walker felt very isolated and although put off by the drive across town after a long day at school, he attended a meeting for the Ogden Trafford Partnership, which "...made my day. It made my term really, because it was the first time I got to sit and talk with physicists for a very long time." It is this feeling of mutual understanding and support which Dan has since sought to create in the Didsbury Partnership, building a diverse community of teachers all willing to share and contribute.

This aspect of connection with like-minded individuals was particularly important during the pandemic, as home-working exacerbated feelings of isolation. Having a forum to share teaching tips and good practice through formal CPD and informal interactions has also been invaluable for many of the teachers. Dan ascribes many improvements in his teaching and schemes of work to ideas gained through partnership CPD, resources highlighted at the Ogden conference and from just talking to other physicists at meetings.

Other strands of the Ogden programme have helped to establish and nurture the partnership. Many initial contacts with schools were brokered by the Regional Representative; a number of teachers from previous partnerships are involved, bringing a wealth of experience; and collaborations with the Physics Engagement Champion (formerly Ogden Outreach Officer) at Manchester University have been extremely valuable in opening up opportunities for pupils.

The sense of being part of something bigger and the external validation of being trusted to lead an Ogden partnership has bestowed a feeling of confidence on Dan as the co-ordinator, giving him a stronger voice within his science department and more widely throughout the school. It has also allowed Didsbury High to work with their wider community of neighbouring schools in a friendly and positive way to support each other for the benefit of all.

The Didsbury Partnership has been able to build on the legacy of previous partnerships and Ogden programmes demonstrating the importance of the diverse range of support and opportunities the Trust provides, and the value of retaining experienced and enthusiastic physics advocates within the Ogden network. When different strands link together to become wrap-around support, the benefits are multiplied.

> "I think that the Trust needs to know that what they're doing is invaluable. It's absolutely fabulous!"
>
> **David Woolley**
> Head of Didsbury High School

Evaluating and understanding our partnerships and their local impact is important. This case study has been produced by Dr Alison Rivett, Evaluation Consultant, who has been working with the Didsbury Partnership to better understand their objectives, processes and achievements.

Teacher support

Our teacher support strand of work has significantly expanded this past year, with more programmes available and a larger team to deliver these initiatives. We continue to support primary teachers with the delivery of practical primary science, whilst for secondary teachers our programme of support is evolving to ensure that all teachers of physics, including the increasing number without physics specialism, have the knowledge, skills and confidence to deliver inspiring and engaging classroom physics.

Our teacher support helps us build meaningful relationships with teachers throughout their careers; starting with Teach Physics internships for undergraduates who might be considering a career in teaching and continuing through to the Teacher Network which offers career-long support for all teachers of physics and primary science leads.

An online collection of resources is also freely available to support the delivery of physics in the classroom, these resources are mainly aimed at primary physics but also offer ideas and resources throughout the key stages.

Teach Physics

Forty-two Teach Physics interns completed placements at 33 schools in summer 2022. In their evaluation, the interns all said they would recommend the scheme and the majority indicated that they were more likely to enter teaching upon graduation or later in their careers (one intern did not complete their evaluation survey). Seventeen per cent of the interns who responded said that they will be doing teacher training after graduation, with five per cent having already signed up to start in 2022. Most of the Teach Physics applicants were in their second or third year at university and had previously attended non-selective state schools.

In January 2021, the Trust's accessibility and inclusion panel reviewed the Teach Physics programme. As a result of their recommendations three online pre-placement sessions were introduced to better prepare interns for their time in school. These included sessions to support applicants in their understanding of effective pedagogy, inclusive practices in teaching and teaching techniques to engage learners.

> "Absolutely incredible experience, I would highly recommend... I really enjoyed the chance to teach a lesson, organise a physics careers workshop and a university-life session. It really increased my confidence and has made me feel that I will be a good teacher if I decide to go into teaching. It has also been a really good opportunity to see what teaching is really like and has opened my eyes to some of the challenges teachers face. Overall, I would highly recommend this to anyone even vaguely interested in teaching as it is a very enjoyable and enlightening experience."
>
> **Teach Physics intern 2022**

In 2021, a destination survey was sent to a total of 248 previous interns. We received 81 responses which showed that 64 per cent were still in education, either doing their undergraduate studies, postgraduate education or doing PhDs; 15 per cent were in teaching or teacher training and 17 per cent were not in teaching; 4 per cent had previously entered the teaching profession but subsequently left.

Early career

The Trust supports early career teachers of physics from their initial training through to their fifth-year post qualification. To support students as they head into teacher training, the Trust this year launched a series of subject knowledge sessions – Subject Knowledge Foundations for Teaching Physics. Delivered online, the sessions covered six core physics topics, working

through the conceptual ideas that students and teachers sometimes struggle with. Thirty-three students took part.

We also worked in partnership with the National Association of School-Based Teacher Trainers (NASBTT) to provide a series of online sessions, which were attended by 125 trainee teachers.

Sixty-nine teachers signed up for our Teaching Core Physics programme, which provides half termly coaching/mentoring sessions in local peer groups for teachers in their first or second year of teaching. Thirty-one teachers in their third, fourth or fifth year of teaching were accepted onto Developing Physics Specialism which provides bespoke mentoring sessions and professional development support.

In Summer 2022, 40 early career and trainee teachers attended our inaugural Early Career Festival which provided a programme of CPD, workshops and lectures.

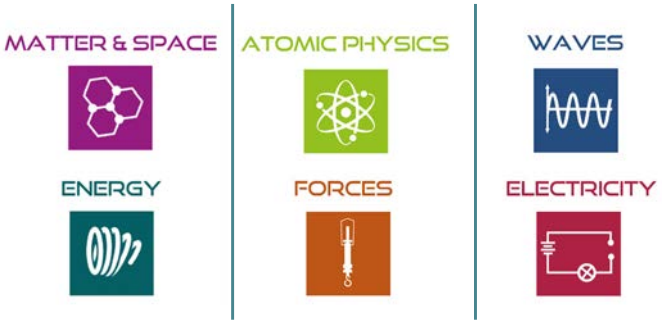
"It was genuinely the most useful two days of my teaching journey so far and I am truly grateful to have had the opportunity."

"The Ogden Trust has been extremely beneficial in providing me with the tools and expertise to enter the physics classroom confident of my knowledge and how to support my students. Being linked with an experienced teacher, who is happy to share advice and resources has been especially useful."

Calvin Browne
Developing Physics Specialism (2022)
Sidney Stringer Academy
(2017 Teach Physics Intern)

Subject Knowledge for Physics Teaching

The Trust is now part of a national Science CPD Partnership which is funded by the Department for Education. STEM Learning is leading this new initiative, in partnership with the Association for Science Education and The Ogden Trust, with advice and support from the Institute of Physics, Primary Science Teaching Trust, Royal Society of Biology and Royal Society of Chemistry. The Science CPD Partnership is bringing together this collective expertise to improve teachers' access to career-long, science-specific continuing professional development. Within this Partnership, the Trust is now delivering a programme of Subject Knowledge for Physics Teaching (SKPT) for non-specialist teachers.



To deliver the first SKPT module of blended learning, the Trust worked with a network of physics teachers at 18 hubs schools across England who led participants through their blended learning module for KS3/4 forces. In the summer term, 67 non-specialist teachers signed up and 57 have completed the module to date.

> "The delivery of the [SKPT forces] course has been brilliant – the in-person sessions and all the support online has been thought provoking and enabled me to reflect on my current strengths/ weaknesses and to be able to approach improvement head-on."
>
> **Helen Assinder**
> La Retraite Roman Catholic Girls' School

Primary science

This year, the Trust has delivered its Primary Science Professional Learning (P3L) CPD to 346 teachers and trainee teachers. Elements of the P3L programme have been delivered in partnership with several teacher training organisations, and one full P3L training day was held for 59 practising primary teachers.

Teacher Network

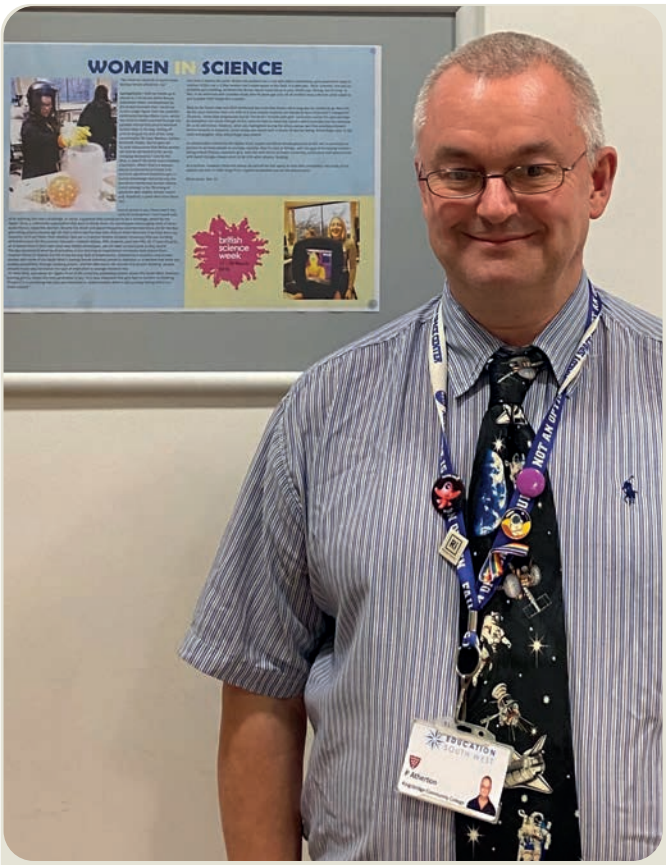
Our Teacher Network currently has more than 1,000 members (including current partnership teachers) and offers regular professional development opportunities. This year, nine secondary physics teachers took part in a visit to the Science and Technologies Facilities Council's Boulby Underground Laboratory to discover more about the ground-breaking research taking place and how it can be brought into the classroom. A further 19 secondary teachers of physics took part in EinsteinPlus (E+) UK, a three-day immersive professional development programme showcasing resources from the Perimeter Institute, hosted by the University of Oxford and funded (and led) by The Ogden Trust.

The first Physics Futures conference was held as part of the Teacher Network; it offered professional development workshops, insight into latest research and opportunities to share experience and best practice. The conference also provided a forum for teachers to share their own research. Attendance was low as the date had to be changed several times due to COVID.

> "A wonderful experience which will definitely improve the physics education of my students"
>
> "Just amazing. Best CPD I've ever been on."
>
> **EinsteinPlus**

Teachers in the Network are able to apply for a limited number of education research opportunities to help them build knowledge for themselves and the wider education sector. The Trust offers scholarships for suitable master's courses and part-time PhD programmes for practising teachers and this year has awarded two grants through this programme. Two practice-based enquiries are also underway.

Senior Teacher Fellowships are awarded to teachers who have demonstrated exceptional commitment to physics



During my Senior Teacher Fellowship, I led a project to deliver primary physics masterclasses to schools in Devon. Sixty Year 12 science ambassadors from Kingsbridge Community College, Brixham Community College, Ivybridge Community College and Devonport High School for Girls were trained to deliver masterclasses. Following a full day's training from the Royal Institution, I continued to work with Kingsbridge students to help them prepare their resources and plan their sessions. Across the project, 12 masterclasses were delivered to Year 5 pupils from feeder primary schools; with additional science days run by the newly trained ambassadors.

The primary students involved with the project have experienced a wide and rich variety of exciting physics sessions and the feedback has been universally positive. The Year 12 ambassadors have gained hugely in terms of skills development and have something very significant to talk about on their UCAS applications. Some of the students involved are considering becoming physics teachers.

Delivery of the project was affected by COVID but it has raised the physics capital and the profile of physics in all of the secondary and primary schools involved; and I have created a bank of resources to support others to run a similar programme.

Phil Atherton
Senior Teacher Fellow (2020–22)
Kingsbridge Community College

education. As part of the fellowship, teachers plan and implement a physics education project, develop projects that deliver sustainable high-quality physics education to students, develop resources that can be made available to other teacher fellows or partnership schools and develop a plan for the sustainability of the project. This year, we awarded four Senior Teacher Fellowships, which included two projects which are being continued into a second year.

STEM clubs

This year, we have been delivering the STEM Learning STEM Club workshop programme for London secondary schools. More than 100 teachers and technicians have attended the virtual workshops across the year looking at how to start a STEM club, how to ensure a STEM club survives and thrives, and how careers and employability skills can be embedded into STEM clubs. The sessions have been led by experts, and delegates from secondary schools, sixth form colleges and FE colleges from across London have been able to find and share ideas and inspiration.

Resources

Ogden resources are freely available online and include a range of primary and secondary resources for physics teaching and learning, as well as guides to encourage and develop physics in school. Collectively, our resources have been downloaded over 7,000 times over the past 12 months (Sept 2021–August 2022); our working scientifically resources remain the most popular and they have been downloaded more than 2,000 times.

Priority actions

The Trust aims to grow the Teach Physics programme and increase applications for 2023, expanding the programme to include engineering undergraduates. Now that more universities are again hosting in-person career fairs, the Trust will be attending a number of these during the Autumn term to promote the scheme to both physics and engineering undergraduates. Following a disappointing response rate to our destination survey in 2021, we will revise our follow-up and monitoring process.

We will work to grow the uptake of our early career provision continuing to provide sessions to school centred initial teacher training (SCITT) and subject knowledge enhancement (SKE) courses to help build expertise and confidence in teaching physics from the outset. We are developing our monitoring and evaluation of the programme to ensure we continue to meet and understand the needs of early career teachers.

In the Autumn term 2022, the SKPT waves module will be delivered in 19 hub schools, whilst the electricity module will be launched at three national hubs in London, Birmingham and York. During 2023, matter & space and atomic physics will be available with support from coaches at hub schools; the face-to-face sessions for energy and forces will be delivered from national hubs with support from Ogden teaching and learning coaches.

As part of the Senior Teacher Fellowship programme, defined projects will be made available (by open application) to teachers looking for further physics experience outside of the classrooms. The projects will be devised and developed by the Trust to address identified needs and will then be delivered by a Teacher Fellow.

We will continue to develop our resources to ensure that we contribute to a representative and diverse physics story; we will review and update our current resources to make sure they are easily accessible to anyone using assistive technology and we will raise awareness of these resources on social media following a decline in downloads this year.

Opportunities for all

The Trust is working to ensure that access to physics-related enrichment and future pathways are open to all regardless of socio-economic constraints. We are expanding and supporting opportunities for universities, employers and community groups to engage with young people, taking physics beyond the classroom and giving an insight into the real-world application of science.

University engagement

The Trust continues to work with physics departments in universities across Great Britain. The Outreach Officer programme provides funding for a fixed three-year period during which time the Trust works with the department to support them to deliver a strategic outreach programme, ideally with the outreach position established as a permanent role.

Seven Ogden outreach officers reached the end of their funding during 2021–22, leaving just two in Ogden-funded posts; one of these will conclude at the end of 2022 and the other in summer 2023. No further Outreach Officer positions will be funded, and the Trust will focus on other support for physics departments to carry out strategic outreach.

The Trust now supports an Outreach Officer Network that is open to all outreach practitioners at universities in Great Britain. We currently have 45 people actively engaged in this network, which meets regularly throughout the year to share practice and improve activities. Members of the network get access to shared training and funding opportunities and can take part in a wide range of physics outreach dialogues, conferences and collaborations.

This year, the Trust launched a new collaborative funding programme to support and facilitate strategic outreach collaboration between university physics departments and to influence positive change in the physics education landscape. Following a hugely competitive application process, the collaborative

As an Ogden Outreach Officer in 2020, I wrote and launched the first outreach and public engagement (OPE) strategy for the department and for the university which now underpins all OPE work we do. This strategy led to our first school outreach programme where we engage young people from disadvantaged backgrounds to show them that continuing to study physics can be a path for them to follow. We have developed our outreach ambassador programme, which this year recruited the highest number of ambassadors ever, and we have won an STFC spark award for our collaborative project with Hertfordshire libraries: 'Cosmic Curiosity: Stories that Spark the Imagination.' I was able to share this work with the national and international science communication community at BIG 2022, Belfast and CAP 2022, Sydney.

My Ogden funding finished this year, but I have been promoted to Outreach Manager and my position has been made permanent with talk of widening our team in the coming years. Being part of the Ogden network provides a supportive environment to share and connect with the wider sector as well as giving our department the ability to carry out high quality outreach and public engagement which will impact under-served communities for many years to come.

Nuala O'Flynn
Outreach Manager
University of Hertfordshire

funding was awarded to Orbyts – a UCL project which will now be rolled out to the universities of of Leicester, Northumbria, Kent, and the Mullard Space Science Laboratory.

The collaborative funding award was announced as part of the inaugural Ogden Outreach Awards which were held at The Royal Society to celebrate physics outreach and recognise the efforts of those involved in developing and delivering it. The awards were launched to recognise and reward efforts in physics outreach from undergraduate ambassadors through to longstanding public engagement projects.

The Ogden Outreach Awards

A pilot programme in Leadership for Outreach and Public Engagement, jointly funded by The Ogden Trust and the Science and Technology Facilities Council finished in December 2021.

Eighteen people from eighteen institutions took part in the programme with 91 per cent of participants concluding that they felt more confident leading outreach and public engagement because of the programme; 82 per cent felt the programme had developed their knowledge and skills in leading outreach and public engagement; with 82 per cent also reporting that they had made substantial progress developing their leadership approach. Recruitment for next cohort has been successful and the course will be running again from September 2022.

Orbyts projects last a minimum of three months and involve regular meetings between pupils and researchers. This interaction with real scientists, positively shifts students' perceptions of who can be a scientist, dispelling harmful stereotypes; participation in authentic science research increases student confidence and science capital, both of which are widely reported as barriers to science entry.

Since receiving our Ogden award, we have launched a new website and are aiming to implement 12 new projects over two years with a sustainable plan to continue that engagement into year three and beyond. The funding will directly contribute to over 1,700 pupil hours with more than 140 Year 10 and 12 pupils who would otherwise not have access to this level of repeated intervention.

Dr Mark Fuller
Orbyts Head of Evaluation and Impact
UCL

These new initiatives are part of efforts to build a broader more sustainable engagement with university physics departments and physics outreach professionals, developing a collaborative and long-term commitment to projects that will have a more profound and lasting impact.

Priority actions

We will continue to build our network for outreach practitioners working in university physics departments and research in Great Britain. Collaborative outreach project funding will be awarded annually; the outreach awards will be held biennially to recognise, celebrate and reward achievements in outreach.

An external evaluation of the outreach officer programme is underway and will report in 2023; the findings from this project will inform our ongoing plans to support university physics outreach.

Employer engagement

Engaging with employers can provide a tangible connection between physics and future careers, highlighting the many and varied pathways that can emerge from studying physics and STEM subjects.

The **Coastal Energy internship programme** is one way that the Trust is engaging with employers and working in priority areas of deprivation – many coastal areas in England are facing socio-economic challenges. The internships provide bursaries for Year 12 and Year 13 students to undertake a 20-day summer placement with a local company in the energy sector. Internships provide a vital springboard into future possibilities, broadening access to career insights, providing meaningful work experience and engaging students in crucial conversations about renewable energy and the environment. The internships are run in partnership with seven local education providers in East Anglia, Barrow, Ulverston and Grimsby, who each have Coastal Energy College Champions. The internships are only available to students in those institutions.

After a two-year period of online Coastal Energy internships, the programme returned to in-person placements for 2022. The CREST award element, which was introduced to provide additional structure and purpose to the research work, has been continued and is a valued component of the programme for the students. Many placements followed a hybrid approach this year, with elements of home-based research and in-person placements to mitigate any impact from the ongoing COVID situation.

Twenty-one students participated in the programme in 2022 at 16 host organisations; feedback indicated that students felt more informed and confident with improved project and time management skills and communication after their placement. So far, 12 students have received a Gold CREST award for their project submission; two have received silver; further work is underway on many of the remaining projects.

Priority actions

We will continue to gradually increase the number of internships available each year and will work to progress the co-funding model with the participating companies; this model will reinforce the value of the scheme to those involved and will help to ensure its longer-term viability. The ambition is for the Coastal Energy programme to become more sustainable with employers taking on the educational bursary costs of the participating students. To ensure that associated costs do not become a barrier to participation for students in future years, the amount of the educational bursary will be reviewed ahead of the 2023 programme.

We are developing plans to expand the Coastal Energy model to other physics-related careers.

By getting the opportunity to experience this industry it made me more aware of the work needed to generate this clean energy, and how many processes energy goes through from being generated to being used in homes... This industry will continue growing in order to meet with global net zero aims making it a great long-term career to pursue.

Alfie Guymer
Energy Intern 2022
Alfie's internship report has received a Gold CREST award.

Grants

In line with our strategy to increase the uptake of physics at post-16, particularly for under-represented students, the Trust awards funding to projects outside of our core schemes which are aimed at improving the teaching and learning of physics.

There are three physics education grant application windows throughout the year for small grants to support the teaching and learning of physics; all applications and reports are completed online. The grants are wide-ranging and support new ideas as well as established good practice. Since September 2021, 19 grants have been awarded to the value of £85,524.

Whilst these grants are awarded for standalone projects, we encourage schools to use a funding award as a stepping-stone into a longer-term relationship with the Trust, sometimes as a gateway to the Teacher Network or to forming a school partnership. In recent years, we have supported schools to launch A-level physics and this funding has come hand-in-hand with (continuing) time and expertise from Ogden consultants to maximise the impact and effectiveness of the grant. Two of this year's physics education grant recipients have gone on to form a school partnership, joining our School Partnerships programme where they will

Photo ©Clive Barda

With support from The Ogden Trust, award-winning education charity HDMT Music launched its national tour of 'Jina and the STEM Sisters', which tells the story of several inspirational women in STEM. The tour has already reached audiences in excess of 2,500 children from more than 40 schools.

Queen Elizabeth's High School (QEHS) is a state maintained, secondary (KS3-KS5) selective school in Gainsborough which is one of the most deprived towns in England; most schools located in the centre of Gainsborough have a much higher than average percentage of disadvantaged students. Our science department at QEHS has received a prestigious platinum science mark award and we are keen to make a positive impact on the wider community.

We successfully applied for an Ogden physics education grant and our student STEM ambassadors are now being mentored to deliver STEM CREST activities to more than 200 local primary school pupils. The ambassadors are developing their physics, communication, creativity and reflective thinking skills; and the primary pupils are working towards a CREST award. Our STEM ambassadors are building career-related learning into the activities and making links to the world of work that pupils are familiar with, building science capital and making connections to the real-world appliance of science.

Through our STEM ambassador initiative and other school science outreach we have done, we have established good relations with primary schools in our community. We are now using this network as the foundation for an Ogden school partnership which will officially launch in September 2022.

Daniel Carvalho
Queen Elizabeth's High School

receive five years of funding, support and CPD to help facilitate longer term impact and lasting change in their school physics provision.

Alumni can apply for physics education grants to support physics-related projects and initiatives; alumni who have since gone into teaching can join our Teacher Network. Further to our physics education grants, an additional three grants were made to organisations supporting other charitable interests of the Trustees; these grants are not open for applications and are solicited directly.

KS1 children collect data on rainfall.

This year, following support from The Ogden Trust (2020–21 grant), the Great Science Share for Schools (GSSfS) launched a new initiative to encourage children to ask physics questions and carry out physics enquiries. More than 900 schools took part in the Great Phizzi Share, reaching 43,000 young people.

The Great Phizzi Share included CPD and resources to support teachers to deliver guided physics enquiries to develop children's working scientifically skills. The practical, purposeful physics enquiries showed how ideas in the curriculum could be linked to real-world contexts around sustainability and climate.

Mark Warner leading an Ogden-funded Senior Physics Challenge in 2008.

In December 2021, Professor Mark Warner FRS sadly passed away after a long illness. Mark was a long-standing friend of the Trust and a passionate advocate for science education. He founded the Isaac Physics online platform with Dr Lisa Jardine-Wright in 2014 and the Trust is proud to have supported this ground-breaking initiative. In memory of Professor Warner, the Trust is now funding an annual Mark Warner prize at the Cavendish Laboratory, which will be awarded to an undergraduate theoretical physicist in recognition of exceptional achievements.

Research and communications

The Trust continues to raise its profile in the physics education arena, delivering our own programmes and initiatives, collaborating on wider research to inform the broader physics education community and commissioning independent research.

Following the publication last year of our collaborative research report with SEERIH (University of Manchester): 10 Key Issues with Children's Learning in Primary Science in England, work has continued to develop a framework of practical guidance, which will support practitioners to monitor children's science learning effectively and to address the issues identified in the original research.

The Primary Science Capital Project was a three year (2019–22) applied action research project funded by The Ogden Trust and the Primary Science Teaching Trust. Following the completion of the research, a handbook has been launched to introduce the Primary Science Capital Teaching Approach (PSCTA).

Five Ogden regional representatives have been taking part in a PSCTA accredited training course. Over the duration of the training, participants have each been working closely with two primary teachers, guiding them to make the adaptions needed to their lessons to ensure an equity approach to teaching science that personalises learning to the children in the class.

Our programmes and our research are giving us a more prominent and influential voice in physics education and our communication channels are increasingly active. Our engagement on social media, especially Twitter, continues to increase; over the past year, we have gathered 621 new followers and at the end of August 2021, had reached a total of 5,000. Nearly 700 tweets have been made, achieving more than 380,000 impressions (the number of times a tweet is shown to people across the platform).

> "Over the past few years, I have been fortunate to witness first-hand the positive impact the PSCTA approach can have, and in many cases, it has been truly transformational in providing young people with equitable opportunities to engage in science and develop their science capital and science identities."
>
> **Scott Walker**
> Ogden Regional Rep and participant in the PSCTA training programme

Our followers on Facebook have increased to 1,540. These platforms enable us to contribute to conversations and engage with a wider audience to share news, ideas and practice from across our programmes.

Priority actions

We will continue the process of delivering and maintaining accessibility standards and building representation, diversity and inclusion for our website, publications, and resources.

Our newly accredited PSCTA trainers will support teachers to develop their teaching practice and embed this social justice approach in primary schools across the country. They will work initially with teachers in our partnership programme.

We will work to further raise our profile in education media and at events so we can contribute more fully to national conversations on physics education and share our expertise and research results more widely.

We will develop our use of social media, more closely monitoring our analytics to feed into a broader digital communications strategy.

Governance, structure and management

Constitution

The organisation was registered as an unincorporated charity on 25 March 1994. The charity is governed by a trust deed, and a supplemental deed dated 18 May 1998. It is registered with the Charity Commission, Charity Registration Number 1037570.

This year, the charitable objects of the Trust were updated. They now allow the Trustees to advance general charitable purposes, in particular, but not limited to:

(i) the advancement of education;
(ii) the advancement of science; and
(iii) the prevention or relief of poverty and the relief of those in need, by reason of youth, age, ill-health, disability, financial hardship or other disadvantage.

Appointment of Trustees

The Trustees are appointed by the existing Trustees. At any one time, there must be a minimum of three Trustees. There were no changes to the Trustee board this year.

Induction and training of Trustees

When new Trustees are appointed, there are procedures in place to ensure that they clearly understand their duties and responsibilities and can assess their own training needs. Most Trustees are long-standing and are able to support the development of new members of the Board.

The Trustees are briefed bi-annually by the Chief Executive about their responsibilities and liabilities as Trustees.

Organisational structure and decision making

The Trustees are responsible for the policies, activities and assets of the charity. They meet four times a year to review developments and activities, and to make any important decisions. When necessary, the Trustees seek advice and support from the charity's professional advisers, including investment managers and accountants. Expert advisers in physics education may also be consulted where appropriate. All trustees give their time voluntarily and receive no benefits from the charity. Any expenses reclaimed from the charity are set out in note 12 to the accounts.

The day-to-day management of the charity's activities, and the implementation of policies, is delegated to Clare Harvey, Chief Executive, in line with an agreed scheme of delegation. At their meetings, the Trustees will review the investment performance, strategic changes to programmes, the impact of programme activities and grant proposals. The Chief Executive's pay is determined by the Trustees who consider a range of factors.

Diversity and inclusion

Diversity and inclusion are core values of our organisation, and we are committed to providing an inclusive workplace for staff and consultants. A deliberate process of training and reflection has been underway for the past 18 months and this journey will be ongoing as we refine and evolve our policies and procedures, and ensure staff and consultants are skilled in equity, diversity, and inclusion issues.

The process of reflection and learning is informing our external-facing work, as we seek to remove any systemic barriers in our programmes and events. We have reviewed and refined our CPD training programmes to make them more accessible and inclusive; and we have updated our procedures to ensure events are open, welcoming, and safe spaces where everyone can participate. We are sharing our learning through programme webinars and conference sessions to help improve other people's awareness of diversity and inclusion issues.

The Ogden Trust aims to increase participation in physics for any under-represented groups, and diversity and inclusion will always be important to the organisation. We will continue to work with our accessibility and inclusion panel to learn from their lived experiences; our journey will be ongoing and iterative as we continue this process of change and learning to mitigate the barriers that may limit participation.

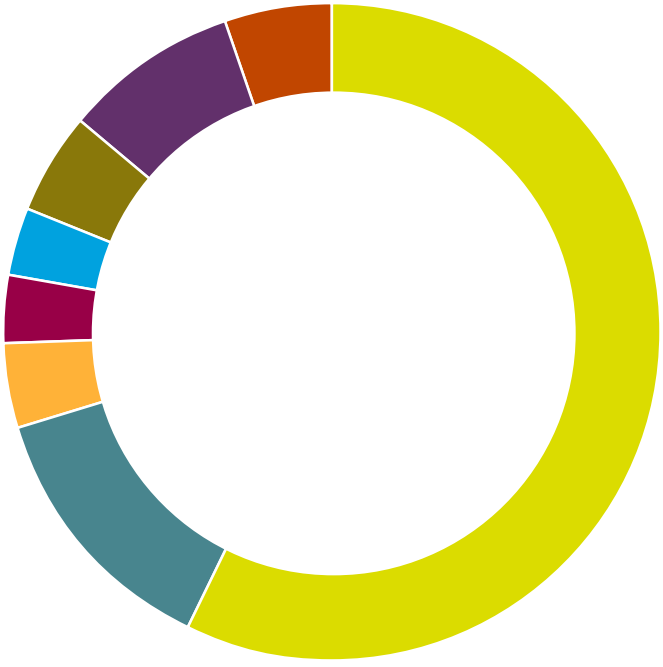
Financial summary

Key financial performance indicators

Total charitable expenditure in 2021–22 was £2,345,272, slightly increased from £2,336,219 in 2020–21. As the prior reporting period was 17 months, this shows a more significant increase across 12 months. Schools had a more stable year after the pandemic, and expenditure increased. Of this expenditure, £1,934,651 was spent directly on physics education activities with the School Partnerships programme constituting the biggest single area of spend. The Trust works through a mixture of small grants (typically less than £5,000) and direct support, primarily professional development activities for teachers. We often convene those on our programmes to share practice, locally and nationally.

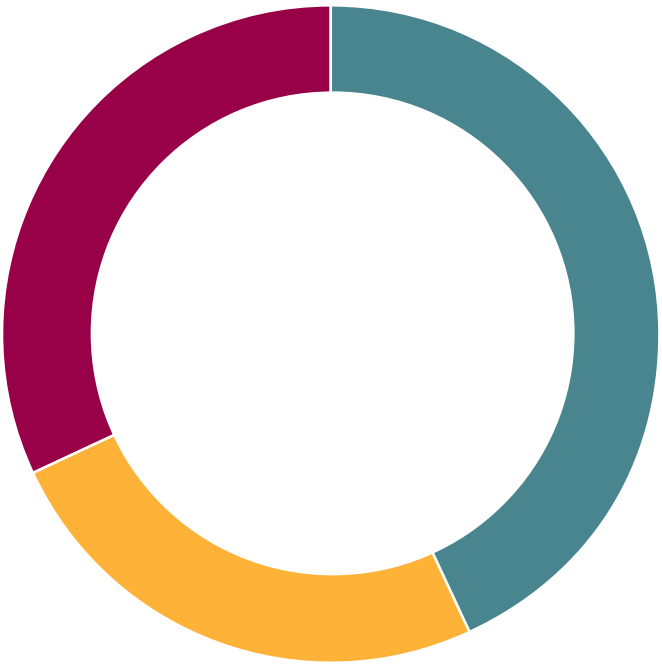
The investment gain in this period has brought the portfolio to the higher end of our reserves target, in line with investment objectives. However, the Trustees are always aware that there are external factors which could affect the achievements of their objectives as all of the Charity's assets are made up of investments and cash, the result of which are dependent on the general performance of the UK and overseas stock markets. In order to minimise this risk, the Trustees set prudent investment policies and place reliance on the investment managers to monitor and advise on necessary investment changes and suitable asset allocation.

Expenditure by programme
April 2021–August 2022



- School Partnerships
- Teacher Support
- Teach Physics internships
- Subject Knowledge for Physics Teaching
- Ogden Outreach Officers
- Grants, bursaries & scholarships
- Other physics activities
- Other charitable purposes

Expenditure by type
April 2021–August 2022



- Direct costs
- Grant funding of activities
- Support & governance costs

Investment policy and performance

There are no restrictions on the charity's power to invest. The investment strategy is set by the Trustees and takes into account income requirements, the risk profile and the investment manager's view of the market prospects in the medium term. The overall investment policy is to maximise total return with a target of 5%. Despite uncertainty and turbulence in the markets, this year has seen a continued gain on investments.

Reserves policy

As explained above, the charity carries out a range of activities, some of which comprise projects requiring significant ongoing financial commitment and investment. The Trustees have examined the requirements for free reserves, ie, those unrestricted funds not designated for specific purposes or otherwise committed. As the majority of the investments are liquid, the majority of the Trust's funds are free reserves.

The Trustees' policy is to manage financial resources in such a way as to provide in full for the grant and bursary commitments made, and to ensure similar levels of commitment in the future. The free reserves must therefore be sufficient to generate sufficient return to allow this to happen. In the current financial climate, the Trustees estimate this amount to be £50,000,000–£70,000,000.

The balance sheet shows free reserves (unrestricted funds less tangible fixed assets) of £65,294,319 (2021: £56,477,847). Following the economic downturn due to COVID, the free reserves are now in the top quartile of the target range. The restricted funds for Energy Internships are currently negative, as explained in Note 21.

Risk management

In line with the requirement for Trustees to undertake a risk assessment exercise and report on the same in their annual report, the Trustees have looked at the risks The Ogden Trust currently faces and have reviewed the measures in place, or needing to be put in place, to deal with them. The Trustees have identified seven main areas where risks may occur, and a comprehensive risk register has been produced.

Having assessed the major risks to which the charity is exposed, in particular those relating to its investments and its finances, the Trustees believe that by monitoring reserve levels, ensuring controls exist over key financial systems, and by examining the grant management processes carried out by the charity they have established effective systems to mitigate those risks.

The business of the Trust is now fully operational following the pandemic. However, COVID continues to be considered in all risk assessments, particularly for those who are highly vulnerable, and contingency plans remain in place for all activities.

Risk	Mitigation
Poor investment returns	These are monitored in quarterly Trustees' meetings and if poor returns are expected grant making can be reduced or halted.
Grant holders behaving in an inappropriate fashion	Grant holders are in contact with the Trust throughout the duration of their grant and such behaviour can be addressed when required.
Grant holders misspending funds	Grant holders are required to account for their spending in their reporting and misspent funds can be reclaimed.
Safeguarding	The Trust has a safeguarding children policy as well as staff behaviour policies. All staff have undertaken child protection and safeguarding training.
Sickness affecting staff	Processes and procedures are now in place for a hybrid working model. When staff are in the office, it is well spaced, ventilated and regularly cleaned. Staff are encouraged to work from home if appropriate to prevent the spread of illnesses.
COVID affecting events	Events will be held in line with government guidance and will take place online where appropriate. Venues will be closely liaised with to minimise financial loss.
Data protection	The Trust has a data protection policy and a retention and disposal policy. The Chief Executive is the Data Protection Officer. All staff have had training on data protection.

Trustees' responsibility statement

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

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity 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 judgments and accounting estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation;
- 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.

The Trustees are responsible for keeping proper accounting records that are sufficient to show and explain the charity's transactions and disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity 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 charity's auditor is unaware;
- they 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 charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

This report was approved by the Trustees, on 14 December 2022 and signed on their behalf by:

Cameron Ogden

Independent auditor's report to the Trustees of The Ogden Trust

Opinion

We have audited the financial statements of The Ogden Trust (the 'charity') for the year ended 31 August 2022 which comprise the statement of financial activities, balance sheet, statement of cash flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- Give a true and fair view of the state of the charity's affairs as at 31 August 2022 and of its incoming resources and application of resources, for the year then ended
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice
- Have been prepared in accordance with the requirements of the Charities Act 2011

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the Trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on The Ogden Trust's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the Trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the Trustees' annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 requires us to report to you if, in our opinion:

- The information given in the trustees' annual report is inconsistent in any material respect with the financial statements;
- Sufficient accounting records have not been kept; or
- The financial statements are not in agreement with the accounting records and returns; or
- We have not received all the information and explanations we require for our audit

Responsibilities of Trustees

As explained more fully in the statement of trustees' responsibilities set out in the Trustees' annual report, the Trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the Trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the charity or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

We have been appointed as auditor under section 144 of the Charities Act 2011 and report in accordance with regulations made under section 154 of that Act.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud are set out below.

Capability of the audit in detecting irregularities

In identifying and assessing risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, our procedures included the following:

- We enquired of management which included obtaining and reviewing supporting documentation, concerning the charity's policies and procedures relating to:

  - Identifying, evaluating, and complying with laws and regulations and whether they were aware of any instances of non-compliance
  - Detecting and responding to the risks of fraud and whether they have knowledge of any actual, suspected, or alleged fraud;
  - The internal controls established to mitigate risks related to fraud or non-compliance with laws and regulations.
- We inspected the minutes of meetings of those charged with governance.
- We obtained an understanding of the legal and regulatory framework that the charity operates in, focusing on those laws and regulations that had a material effect on the financial statements or that had a fundamental effect on the operations of the charity from our professional and sector experience.
- We communicated applicable laws and regulations throughout the audit team and remained alert to any indications of non-compliance throughout the audit.
- We reviewed any reports made to regulators.
- We reviewed the financial statement disclosures and tested these to supporting documentation to assess compliance with applicable laws and regulations.
- We performed analytical procedures to identify any unusual or unexpected relationships that may indicate risks of material misstatement due to fraud.
- In addressing the risk of fraud through management override of controls, we tested the appropriateness of journal entries and other adjustments, assessed whether the judgements made in making accounting estimates are indicative of a potential bias and tested significant transactions that are unusual or those outside the normal course of business.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the charity's Trustees as a body, in accordance with section 144 of the Charities Act 2011 and regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the charity's Trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and the charity's Trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Date: 14 February 2023

Sayer Vincent LLP, Statutory Auditor
Invicta House, 108-114 Golden Lane, LONDON, EC1Y 0TL

Sayer Vincent LLP is eligible to act as auditor in terms of section 1212 of the Companies Act 2006

Statement of financial activities for the period ended 31 August 2022

	Note	Unrestricted funds 2022 £	Restricted funds 2022 £	Total funds 2022 £	Total funds 2021 £
Income from:					
Donations	2	720	22,902	23,622	5,139
Charitable activities	3	79,162	-	79,162	-
Investments	4	479,237	-	479,237	370,667
Other Income	5	18,205	-	18,205	127,522
Total income		**577,324**	**22,902**	**600,226**	**503,328**
Expenditure on:					
Raising funds	6	303,170	-	303,170	379,030
Charitable activities	7	2,015,768	26,334	2,042,102	1,957,189
Total expenditure		**2,318,938**	**26,334**	**2,345,272**	**2,336,219**
Net expenditure before investment gains		**(1,741,614)**	**(3,432)**	**(1,745,046)**	**(1,832,891)**
Net gains/(losses) on investments	14	7,566,400	-	7,566,400	20,627,155
Net (expenditure)/ income and net movement in funds		**5,824,786**	(3,432)	**5,821,354**	**18,794,264**
Reconciliation of funds:					
Total funds brought forward		59,480,095	-	59,480,095	40,685,831
Total funds carried forward	21	65,304,881	(3,432)	65,301,449	59,480,095

The notes on pages 36 to 59 form part of these financial statements.

Balance sheet

	Note	31 August 2022 £	31 August 2021 £
Fixed assets			
Tangible assets	13	10,562	2,248
Investments	14	65,787,408	60,232,572
Total fixed assets		**65,797,970**	**60,234,820**
Current assets			
Debtors	15	131,032	105,916
Cash at bank and in hand		66,158	127,869
		197,190	**233,785**
Creditors: amounts falling due within one year	16	(621,264)	(824,039)
Net current liabilities		**(424,074)**	**(590,254)**
Total assets less current liabilities		**65,373,896**	**59,644,566**
Creditors: amounts falling due after more than **one year**	17	(72,447)	(164,471)
Net assets		**65,301,449**	**59,480,095**
Charity funds			
Unrestricted funds	21	**65,304,881**	59,480,095
Restricted funds	21	**(3,432)**	-
Total funds		**65,301,449**	**59,480,095**

The notes on pages 36 to 59 form part of these financial statements.

The financial statements were approved by the Trustees on 14 December 2022 and signed on their behalf, by:

.....

Cameron Ogden
Trustee

Statement of cash flows for the period ended 31 August 2022

	Note	2022 £	2021 £
Cash flows from operating activities			
Net cash used in operating activities	18	**(1,956,801)**	**(1,780,232)**
Cash flows from investing activities			
Dividends, interests and rents from investments		482,257	370,667
Purchase of property, plant and equipment		(9,654)	(1,757)
Proceeds from sale of investments		2,223,287	1,396,667
Purchase of investments		(800,800)	-
Net cash provided by investing activities		**1,895,090**	**1,765,577**
Change in cash and cash equivalents in the year		**(61,711)**	**(14,655)**
Cash and cash equivalents at the beginning of the year		127,869	142,524
Cash and cash equivalents at the end of the year		**66,158**	**127,869**

The notes on pages 36 to 59 form part of these financial statements.

Notes to the financial statements for the period ended 31 August 2022

1. Accounting policies

1.1 Basis of preparation of financial statements

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant notes to these accounts. The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (second edition – October 2019) – (Charities SORP (FRS 102)) the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The financial statements have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair view'. This departure has involved following Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 rather than the Accounting and Reporting by Charities: Statement of Recommended Practice from 1 April 2005 which has since been withdrawn.

No significant estimates or judgements have been made by management in preparing these financial statements.

The Ogden Trust constitutes a public benefit entity as defined by FRS 102.

1.2 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the company for particular purposes. The costs of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

1.3 Going concern

The Trustees have reviewed the financial position of the charity and have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Accordingly, the financial statements continue to be prepared on the going concern basis.

1.4 Income

All income is recognised once the charity has entitlement to the income, it is probable that the income will be received and the amount of income receivable can be measured reliably.

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity; this is normally upon notification of the interest paid or payable by the Bank.

Dividends are recognised once the dividend has been declared and notification has been received of the dividend due.

Income tax recoverable in relation to investment income is recognised at the time the investment income is receivable.

Donation income is recognised when received.

Other income is recognised in the period in which it is receivable and to the extent the goods have been provided or on completion of the service.

1.5 Expenditure

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

Support costs, including governance costs are those costs incurred directly in support of expenditure on the objects of the charity and include management carried out at the principal office. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements. Support and governance costs have been allocated to activities based on staff time spent.

Grants payable are charged in the year when the offer is made except in those cases where the offer is conditional, such grants being recognised as expenditure when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the period end are noted as a commitment, but not accrued as expenditure.

Expenditure on raising funds represents the fees paid to investment managers in connection with the management of the Charity's listed investments.

All resources expended are inclusive of irrecoverable VAT.

1.6 Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

1.7 Tangible fixed assets and depreciation

Tangible fixed assets are carried at cost, net of depreciation and any provision for impairment. Depreciation is provided at rates calculated to write off the cost of fixed assets, less their estimated residual value, over their expected useful lives on the following bases:

Fixtures & fittings	20% per annum based on cost
Computer equipment	25% per annum based on cost

1.8 Investments

Fixed asset investments are a form of financial instrument and are initially recognised at their transaction cost and subsequently measured at fair value at the Balance Sheet date, unless fair value cannot be measured reliably in which case it is measured at cost less impairment.

All gains and losses are taken to the Statement of Financial Activities as they arise. Realised gains and losses on investments are calculated as the difference between sales proceeds and their opening carrying value or their purchase value if acquired subsequent to the first day of the financial year. Unrealised gains and losses are calculated as the difference between the fair value at the year end and their carrying value.

Investment gains and losses, whether realised or unrealised, are combined and shown in the heading 'Gains/(losses) on investments' in the Statement of Financial Activities.

1.9 Foreign currencies
Monetary assets and liabilities denominated in foreign currencies are translated into sterling at rates of exchange ruling at the balance sheet date.

Transactions in foreign currencies are translated into sterling at the relevant monthly average exchange rate.

Exchange gains and losses are recognised in the Statement of Financial Activities.

Foreign exchange gains and losses arising on investments are disclosed within gains/(losses) on revaluations of fixed assets on the Statement of Financial Activities.

1.10 Debtors
Trade and other debtors are recognised at the settlement amount 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 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.

1.12 Creditors and provisions
Liabilities are recognised when there is an obligation at the Balance Sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably. Liabilities are recognised at the amount that the charity anticipates it will pay to settle the debt or the amount it has received as advanced payments for the goods or services it must provide. Provisions are measured at the best estimate of the amounts required to settle the obligation. Where the effect of the time value of money is material, the provision is based on the present value of those amounts, discounted at the pre tax discount rate that reflects the risks specific to the liability. The unwinding of the discount is recognised within interest payable and similar charges.

1.13 Pensions
The charity operates a defined contribution pension scheme, and the pension charge represents the amounts payable by the charity to the fund in respect of the year.

1.14 Critical accounting estimates and areas of judgement
Preparation of the financial statements requires management to make significant judgements and estimates. The key areas in the financial statements where these judgements and estimates have been made are as follows:

- depreciation on fixed assets;
- fair value of investments, and;
- grants accrued payable in more than one year.

2. Income from donations

	Unrestricted funds 2022 £	Restricted funds 2022 £	Total funds 2022 £	Total funds 2021 £
Donations	720	1,688	**2,408**	5,139
Grants	-	21,214	**21,214**	-
	720	**22,902**	**23,622**	**5,139**

In 2021, £1,239 was unrestricted and £3,900 was restricted.

3. Income from charitable activities

	Unrestricted funds 2022 £	Restricted funds 2022 £	Total funds 2022 £	Total funds 2021 £
Science CPD programme (STEM Learning Ltd)	79,162	-	**79,162**	-

4. Investment income

	Unrestricted funds 2022 £	Restricted funds 2022 £	Total funds 2022 £	Total funds 2021 £
Income from listed investments	479,143	-	479,143	366,792
Interest on bank fixed deposits	94	-	94	3,875
	479,237	**-**	**479,237**	**370,667**

In 2021, all investment income was unrestricted.

5. Other income

	Unrestricted funds 2022 £	Restricted funds 2022 £	Total funds 2022 £	Total funds 2021 £
Madoff Victims Fund Compensation	18,205	-	18,205	127,522

6. Investment management costs

	Unrestricted funds 2022 £	Total funds 2022 £	Total funds 2021 £
Investment manager's fees	447,225	447,225	557,710
Investment management fee rebate	(144,055)	(144,055)	(178,860)
	303,170	**303,170**	**379,030**

The rebate was negotiated by the trustees and is equivalent to a third of their 1.5% management fee charged to the Omnia Fund L.P. for dealing with the Fund's affairs. In 2021 all expenditure on investment management costs was unrestricted.

7. Analysis of expenditure

Analysis of expenditure: current year

	Direct costs 2022 £	Grant funding of activities (note 8) 2022 £	Support & governance costs (note 10) 2022 £	Total 2022 £	Total 2021 £
School Partnerships	547,573	274,021	350,189	1,171,783	1,047,238
Teacher Support	125,807	58,893	83,762	268,462	181,798
Teach Physics internships	4,351	50,317	30,465	85,133	148,719
Subject Knowledge for Physics Teaching (SKPT)	67,004	-	-	67,004	-
Ogden Outreach Officers	44,105	(40,331)	60,929	64,703	104,670
Alumni Programme	-	-	-	-	36,844
Grants	4,923	81,907	22,833	109,663	203,125
Bursaries and scholarships (note 9)	-	(12,000)	3,785	(8,215)	394
Other physics activities	43,799	71,390	60,929	176,118	161,819
Physics education activities	**837,562**	**484,197**	**612,892**	**1,934,651**	**1,884,607**
Other charitable purposes	1,500	98,381	7,570	107,451	72,582
All charitable activities	**839,062**	**582,578**	**620,462**	**2,042,102**	**1,957,189**
2021	499,156	701,926	756,107	1,957,189	

In 2021, charitable activities expenditure amounting to £3,900 was restricted. The support and governance costs have been allocated to direct and grant making activities based on staff time spent. Total support costs allocated to grant activities is £238,301.

Analysis of expenditure: prior period

	Direct costs 2021 £	Grant funding of activities (note 8) 2021 £	Support & governance costs (note 10) 2021 £	Total 2021 £	Total 2020 £
School Partnerships	278,121	280,520	488,597	1,047,238	1,021,007
Teacher Network	44,605	67,404	69,789	181,798	104,822
Ogden Outreach Officers	84,922	(38,396)	58,144	104,670	497,735
Teach Physics internships	5,088	97,130	46,501	148,719	92,615
Alumni programme	-	25,200	11,644	36,844	105,935
Grants	437	167,756	34,932	203,125	196,712
Bursaries and scholarships (note 9)	-	(11,250)	11,644	394	(5,172)
Other physics activities	85,983	52,548	23,288	161,819	183,801
Physics education activities	**499,156**	**640,912**	**744,539**	**1,884,607**	**2,197,455**
Other charitable purposes	-	61,014	11,568	72,582	240,323
All charitable activities	**499,156**	**701,926**	**756,107**	**1,957,189**	**2,437,778**
2020	560,048	1,348,550	529,180	2,437,778	

In 2020, charitable activities expenditure amounting to £19,283 was restricted. The support and governance costs have been allocated to direct and grant making activities based on staff time spent. Total support costs allocated to grant activities is £362,078.

8. Grants payable

	2022 £	2021 £
Grants to institutions:		
Primary schools	189,112	182,116
Secondary schools	110,021	275,681
Universities	83,741	(14,453)
Organisations	142,774	91,854
Subtotal	**525,648**	**535,198**
Grants to individuals	56,930	166,728
Total	**582,578**	**701,926**

215 grants and no scholarships were awarded in 2022, compared with 327 grants and 1 scholarship in 2021.

Grants payable to Institutions, net of write backs are as follows:

Primary schools	2022 £	2021 £
Ashton Gate Primary School	100	2,500
Avonmore Primary School	1,780	(2,000)
Beacon Ace Academy	5,000	5,500
Beechview Academy	-	5,000
Bevington Primary School	-	2,500
Bignold Primary School	-	1,620
Briar Hill Infant School	250	-
Broadlea Primary School	-	(1,225)
Camelsdale Primary School	-	1,005
Charlton Primary School	5,500	-
Cherry Fields Primary School	-	2,500
Chestnuts Primary School	5,500	-
Christchurch Junior School	2,500	-
Churchdown Village Junior School	-	70
Cooper Perry Primary School	5,500	-
Copley Primary School	2,300	5,500
Daven Primary School	250	-
Denbigh Primary Schoolw	5,500	-
Dulverton Junior School	250	-
Durham Gilesgate Primary School	5,000	2,500
Falmouth Primary Academy	5,500	-
Ferndale Primary and Nursery School	2,480	2,500
Gaskell Community Primary School	250	-
Gayton Primary School	-	2,500

Primary schools (continued)	2022 £	2021 £
Gisburn Primary School	250	-
Great Academics Education Trust	-	9,495
Grimley & Holt CE Primary School	5,500	-
Gurnard Primary School	1,000	10,500
Hallam Primary School	2,500	-
Hartside Primary Academy	1,000	2,340
Hazeldene School	5,500	-
Hertford St Andrew Primary School	-	40
John Donne Primary School	-	2,160
Kings Ash Academy	3,870	5,500
Kingsland CE Primary School	-	384
Kippax North Primary School	-	(1,274)
Knowsley Lane Primary School	5,475	-
Ledbury Primary School	-	1,000
Loughborough Primary School	-	2,500
Lunt's Heath Primary School	1,500	5,000
Middleton CE Primary School	2,500	-
Moorpark Junior School	600	935
Newby Primary School	400	-
Newsham Primary School	1,500	5,000
Okehampton Primary School	2,230	5,000
Oundle Church of England Primary School	2,105	2,500
Our Lady and Saint Kenelm Primary School	250	-
Our Lady of Mount Carmel First School	250	-
Our Lady of Walsingham Catholic Primary School	-	3,500
Pakeman Primary School	972	-
Red Oak Primary School	4,850	5,500
Richard Taylor CE Primary School	4,500	5,500
Rockingham Junior and Infant School	5,500	-
Rushton CE Primary School	5,500	-
Sculthorpe Primary Academy	1,000	2,500
Sherford Vale School	-	730
Sibsey Free Primary School	2,500	5,250

Primary schools (continued)	2022 £	2021 £
Silver Springs Primary School	12,000	-
Somerleyton Primary School	-	1,000
Springbank Primary School	250	16,000
St Agnes CE Primary School	2,300	2,500
St Alphege Junior school	250	250
St Anne's RC Primary School	-	2,000
St Augustines RC Primary School	-	1,000
St Christopher's Catholic Primary School	950	-
St Clements CE Primary	-	5,000
St Edward's Catholic Academy, Swadlincote	2,500	-
St Edward's Catholic Primary School, Sheerness	2,430	-
St Laurence's Catholic Primary School	5,500	-
St Maria Goretti Catholic Academy	-	3,760
St Matthew's Catholic Primary School	5,000	5,500
St Pauls CE Primary School	5,000	5,500
St Peter in Thanet	-	2,500
St Peter's Elwick Church of England Primary School	5,500	-
St Stephen Churchtown Academy	2,500	3,500
St Andrews & St Marks CE Junior School	-	1,000
St Stephen's CE Primary School	-	5,500
Stella Maris Catholic Primary School	2,500	2,500
Streatham Wells Primary School	2,420	5,500
Sunnyhill Primary School	2,500	-
Sutton in Craven CP School	2,500	5,500
Walford Primary School	-	1,000
Walton Priory Middle School	4,500	-
Waterside Primary School	5,350	-
Westminster Primary Academy	-	2,500
Whitehouse Common Primary School	250	-
Whittington CE Primary School	-	(1,624)
Wickham Market Primary School	-	200
Willenhall Community Primary School	5,500	-
Wybourn Community Primary School	5,000	5,500

Primary schools (continued)	2022 £	2021 £
Wyvil Primary School	5,500	-
Other	-	1,500
Total	**189,112**	**182,116**

Secondary schools	2022 £	2021 £
Alder Community High School	2,600	1,833
Alexandra Park School	-	18,500
Ark Globe Academy	-	2,000
Ashton Community Science College	12,000	9,000
Avanti Fields School	-	3,500
Beamont Collegiate Academy	1,460	5,500
Belmont Community School	-	(500)
Benenden School	1,860	2,500
Berwick Academy	-	2,500
Bideford College	2,160	2,500
Bishop Barrington Academy	12,000	-
Blackpool Sixth Form College	2,500	2,500
Bonus Pastor Catholic College	6,000	5,500
Bridgwater College Academy	(1,120)	2,240
Brixham College	-	(2,000)
Brixton Learning Collaborative	2,450	2,460
Burnley College	-	1,205
Carre's Grammar School	117	-
Castle Manor Academy	1,500	-
Castle View Academy	1,510	5,500
Chelsea Academy	-	1,000
Chilton Academy	-	330
Cleeve School	5,500	-
Consett Academy	1,850	70
Davidson CE High School for Girls	-	2,599
Didsbury High School	1,200	5,500
DRET Quay Academy	5,500	-

Secondary schools (continued)	2022 £	2021 £
Earl Mortimer & Sixth Form Centre	-	(866)
East Norfolk Sixth Form College	-	(300)
Elizabeth Garrett Anderson School	5,000	-
Energy Coast UTC	660	2,500
Mounts Bay Academy	-	2,000
Ernesford Grange Community Academy	-	750
Exeter Mathematics School	-	(2,000)
Exeter School	(250)	-
Fulneck School	(1,673)	-
Girls' Day School Trust	-	66,476
Great Academy Ashton	-	2,654
Hadley Learning Community	2,500	-
Haggerston School	(3,242)	-
Hartlepool Sixth Form College	-	540
Hartpury College	-	(2,168)
Helston Community College	-	8,000
Highbury Fields School	-	(1,000)
Hinckley Academy and John Cleveland Sixth Form Centre	-	(600)
Humberston Academy/Havelock Academy	-	5,500
Impington Village College	200	-
Kensington Aldridge Academy	1,000	-
Kettering Buccleuch Academy	-	2,500
King Edward VI Grammar School - Louth	-	1,500
King Edward VII Academy	4,500	5,500
Kingsbridge Community College	250	9,250
Lampton Academy	-	800
Leeds Sixth Form College	-	2,000
Limehurst Academy	-	4,000
London Design & Engineering UTC	-	2,519
Longridge Towers School	5,000	-
Longsands Academy	1,215	5,500
Malcolm Arnold Academy	5,500	-
Marden High School	-	885

Secondary schools (continued)	2022 £	2021 £
Marine Academy Plymouth	(117)	3,142
Merchants' Academy	-	2,890
New College Worcester	-	3,540
North Cambridge Academy	-	1,000
North East Learning Trust	-	3,000
Nunnery Wood High School	1,400	-
Oldham Sixth Form College	250	-
Our Lady Of Lourdes Catholic MAC	-	3,000
Paget High School	-	(1,000)
Painsley Catholic Academy	-	1,838
Ponteland High School	500	-
Presdales School Academy Trust	-	2,925
Queen Elizabeth's High School	2,142	-
Reach South Multi Academy Trust	-	3,065
Sharples School	400	2,540
Sir John Leman High School	1,215	-
Skegness Grammar School	(167)	1,901
South Bromsgrove High School	-	650
Southmoor Academy	-	250
Spires Academy	2,500	1,070
St Aidan's Church of England High School	(3,750)	5,500
St Augustine's Catholic High School	-	4,332
St Bede's Inter-church School	-	(700)
St Bernadette Catholic School	-	1,977
St Edward's Catholic Academy	2,500	5,500
St Marylebone Church of England School	440	552
St Richard's Catholic College	1,000	-
St Cuthbert's RC High School	-	5,000
The Whitstable School	-	2,500
Stewards Academy	1,000	2,500
Stockton Sixth Form College	-	(500)
Tapton School	-	8,000
The Academy at Shotton Hall	3,500	5,000

Secondary schools (continued)	2022 £	2021 £
The Gatwick School	(864)	2,500
The Gilberd School	-	(850)
The Godolphin and Latymer School	-	(350)
The King's School (Grantham)	2,500	5,500
The Mounbatten School	2,500	-
The Priory Learning Trust	2,370	2,500
The UCL Academy	-	(500)
The Whitby High School	5,000	5,500
Thomas Mills High School	-	1,520
Titus Salt School	-	(1,000)
Urmston Grammar School	705	(2,100)
Wardle Academy	4,900	2,500
Whitley Academy	-	(950)
Workington Academy	350	-
Other	-	1,762
Total	**110,021**	**275,681**

Universities	2022 £	2021 £
Cardiff University	(1,350)	(4,169)
Durham University	3,000	(3,000)
Harvard Business School	8,881	(24,544)
Imperial College London	-	2,100
Keele University	3,000	(6,461)
Lancaster University	1,020	4,940
Newcastle University	(1,217)	3,700
Northumbria University	(47)	47
Queen Mary University of London	-	(29,335)
Royal Holloway University of London	(4,549)	-
Sheffield Hallam University	12,660	13,660
The Open University	1,125	(4,237)
University College London	39,750	(4,250)
University of Bath	(9,306)	(209)
University of Birmingham	37,650	1,305
University of Bristol	2,400	-
University of Cambridge	10,000	-
University of Edinburgh	(6,308)	-
University of Hertfordshire	(4,557)	-
University of Kent	1,373	(4,310)
University of Leeds	(1,356)	-
University of Leicester	-	5,000
University of Lincoln	(1,796)	4,800
University of Liverpool	-	69
University of Manchester	12,000	18,500
University of Nottingham	(21,667)	(3,000)
University of Sheffield	1,500	3,421
University of St Andrews	-	2,000
University of Surrey	(1,500)	-
University of Worcester	35	4,974
University of York	3,000	4,546
Total	**83,741**	**(14,453)**

Organisations	2022 £	2021 £
1001 Inventions	-	4,950
1851 Trust	10,000	-
Aerospace Bristol	-	4,500
Astin Consulting	-	4,924
Blyth STEM Hub	-	5,000
BM Schools Out UK	1,000	-
Bright Box Makerspace	-	(8,600)
Cambridge Hands-On Science (CHaOS)	5,000	-
Child Bereavement UK	-	1,250
EDT (Engineering Development Trust)	-	4,865
Founders4Schools	5,000	-
HMDT Music	4,750	4,500
Institute of Physics	15,000	-
Liberty Arts Yorkshire	-	5,000
Lightyear Foundation	-	5,660
Links to a Life	4,900	-
Mahdlo (Oldham) Youth Zone	4,000	-
Mangorolla CIC	-	10,000
Mustaqbill (Future) Foundation	5,000	-
National Youth Agency	(2,000)	-
Physics Partners	-	5,000
Plymouth Science CIC	-	5,000
Robinson Education Solutions Ltd	-	3,000
Royal Trinity Hospice	-	5,000
SATRO	3,500	-
Scarabeus Aerial Theatre	-	5,000
Science Magic Shows (Matt Pritchard)	-	3,000
SHINE	75,000	-
Special Boat Service Association	-	15,000
Teachometer	1,624	-
The Institute of Art and Ideas	-	3,150
The Smallpeice Trust	-	5,000
The Spencer Steadman Trust	10,000	-

Organisations (continued)	2022 £	2021 £
Turtle Key Arts	-	4,680
UK Students for the Exploration and Development of Space	-	(4,025)
Total	**142,774**	**91,854**
Grants to individuals	56,930	166,728
Total grants	**582,578**	**701,926**

A reconciliation of the grants payable and grant commitments figures shown in these accounts is as follows:

	2022 £	2021 £
Grant commitments at 1 September 2021	837,714	1,725,401
Commitments made in the period net of grants released	594,578	713,176
Grants paid during the period	(865,658)	(1,600,863)
Total	**566,634**	**837,714**

Grant commitments at 31 August 2022 are payable as follows:

	2022 £	2021 £
Within one year (included with note 16)	494,187	673,243
After more than one year (included with note 17)	72,447	164,471
Total	**566,634**	**837,714**

9. Bursaries and scholarships

During the period ended 31 August 2022, the Trustees have committed the following bursaries to pupils of various secondary schools and scholarships to undergraduates of various universities for physical sciences courses:

	2022 £	2021 £
No (2021: one) undergraduate scholarships started Autumn 2020	-	4,500
Movement in provision for prior year approved scholarships	(12,000)	(15,750)
Total	**(12,000)**	**(11,250)**

No further undergraduate scholarships are being made, although existing scholarships continue to be paid. Adjustments are made annually based on changes to course length and early departure from eligible courses.

A reconciliation of the bursaries and scholarships payable and commitments figures shown in these accounts is as follows:

	2022 £	2021 £
Bursaries and scholarships commitments at 1 September 2021	73,500	159,000
Bursaries and scholarships movement (see above)	(12,000)	(11,250)
	61,500	147,750
Total bursaries and scholarships payable:		
Bursaries paid during the year	-	-
Scholarships paid during the year	(25,500)	(74,250)
Bursaries and scholarships commitments at 31 August 2022	**36,000**	**73,500**

Bursaries and scholarships commitments at 31 August 2022 are payable as follows:

	2022 £	2021 £
Within one year (included with note 16)	36.000	73,500
After more than one year (included with note 17)	-	-
Total	**36,000**	**73,500**

10. Support costs

	Total 2022 £	Total 2021 £
Staffing costs		
Wages, salaries and medical insurance	320,886	402,152
National insurance	28,325	32,658
Pension costs	17,181	21,729
Recruitment costs	3,995	2,150
Staff training and development	29,041	13,200
Consultancy costs	7,775	10,050
Subtotal	**407,203**	**481,939**
Office costs		
Office rental and costs	125,375	177,146
Printing, postage and stationery	4,087	5,561
Web and digital	19,175	46,213
Publications and promotional materials	3,499	140
Travel expenses	2,326	713
Depreciation & loss on disposal of assets	1,340	4,180
Payroll and other fees	1,379	1,252
Accountancy fees	27,613	35,783
Subtotal	**184,794**	**270,988**
Governance costs		
Legal fees	15,845	-
Audit fees	12,620	6,200
Subtotal	**28,465**	**6,200**
Total	**620,462**	**759,127**

The 2022 audit fee is £8,000 net of VAT (2021: £7,350). The 2022 audit fee expense above also includes £3,020 of the 2021 audit fee, which was under accrued in the previous financial year.

These costs have been apportioned to the charitable activities according to the amount of staff time spent on them.

11. Net expenditure

This is stated after charging:

	2022 £	2021 £
Depreciation of tangible fixed assets – owned by the charity	1,340	4,180
Auditor's remuneration – audit	8,000	7,350
Auditor's remuneration – non audit	-	-
Pension costs	17,181	21,729
Operating lease costs	85,134	135,181

12. Trustee remuneration and expenses and the cost of key management personnel

Staff costs were as follows:

The average number of persons employed by the charity during the year was as follows:

	2022	2021
Charitable activities	11	8

The numbers of employees whose emoluments during the year fell within each band of £10,000 from £60,000 upwards were as follows (the 2021 comparator is based on a 17-month period):

	2022	2021
In the band £60,000 – £70,000	1	-
In the band £70,000 - £80,000	-	1
In the band £90,000 – £100,000	-	1

As at 31 August 2022, £2,086 was owed by the Trust in relation to the pension scheme (2021: £597).

No trustees received reimbursement of expenses or benefits in the year.

The key management personnel of the charity comprise the Trustees and Chief Executive. The Trustees all give their time and expertise without any kind of remuneration or other benefit in kind (2021: £Nil). The total employment benefits, including employers NI of key management personnel over the year was £81,338 (2021: £112,400 over 17-month period).

13. Tangible fixed assets

	Computer equipment £	Total £
Cost		
At September 2021	13,633	13,633
Additions	9,654	9,654
Disposals	-	-
At 31 August 2022	**23,287**	**23,287**
Depreciation		
At 1 September 2021	11,385	11,385
Charge for the year	1,340	1,340
Additions	-	-
At 31 August 2022	**12,725**	**12,725**
Net book value		
At 31 August 2022	**10,562**	**10,562**
At 31 August 2021	2,248	2,248

14. Fixed asset investments

	Listed securities £	Cash held for investment purposes £	Total £
Market value			
At 1 September 2021	59,238,742	993,830	60,232,572
Additions	800,800		800,800
Disposals (proceeds £2,223,287, realised gain £290,284)	(1,933,003)	-	(1,933,003)
Other cash movements	-	(141,853)	(141,853)
Revaluations / currency gains	7,092,240	183,877	7,276,117
Investment management fees	(447,225)	-	(447,225)
At 31 August 2022	**64,751,554**	**1,035,854**	**65,787,408**
Historical cost	**11,362,005**	**1,035,854**	**12,397,859**

All the fixed asset investments are held in the UK.

All investments are carried at their fair value. Investment in equities and fixed interest securities are all traded in quoted public markets, primarily the London Stock Exchange. Holdings in common investment funds, unit trusts and open ended investment companies are at the bid price or the NAV of the fund. The basis of fair value for quoted investments is equivalent to the market value, using the bid price. Asset sales and purchases are recognised at the date of trade at cost (that is their transaction value).

The Charity manages the investment portfolio themselves and regularly consults with market professionals on its investment strategy. The Charity is operating an investment policy that provides for a degree of diversification of holdings within different unit trust investments. The sole purpose of the investment strategy is to fund the annual expenditure of the Trust. The Charity has invested in a number of unit trusts in order to protect the Charity's exposure to volatility in the market and seek low risk investments wherever possible. The Investment Strategy is designed to seek absolute returns on its investments and does not differentiate between income arising from Interest and dividends or capital growth on its investments in its funding decisions.

All funds have monthly liquidity and the Trust regularly liquidates part of its Fund investments at the monthly NAV value to meet the expenditure of the Trust. The Trust makes investments both in Sterling and US dollars and from time to time hedges its foreign currency exposure.

The Charity does not make use of derivatives and similar complex financial instruments as it takes the view that investments are held for their longer-term growth and annual income.

The Charity has no material investment holdings in markets subject to exchange controls or trading restrictions.

15. Debtors

	2022 £	2021 £
Amounts due in more than 1 year:		
Rent deposit	19,410	19,410
Amounts due in less than 1 year:		
Trade debtors	32,260	126
Rebate of external management fees	11,000	10,712
Other debtors	31,007	32,628
Prepayments and accrued income	37,355	43,040
Total	**131,032**	**105,916**

16. Creditors: amounts falling due within one year

	2022 £	2021 £
Trade creditors	13,496	12,928
Other taxation and social security	12,606	15,981
Grants payable (note 8)	494,187	673,243
Bursaries and scholarships payable (note 9)	36,000	73,500
Other creditors	6,860	899
Accruals	58,115	47,488
Total	**621,264**	**824,039**

17. Creditors: amounts falling due after more than one year

	2022 £	2021 £
Grants payable (note 8)	72,447	164,471
Bursaries and scholarships payable (note 9)	-	-
Total	**72,447**	**164,471**

18. Analysis of net assets between funds

Analysis of net assets between funds: current year

	Unrestricted £	Restricted £	Total £
Tangible fixed assets	10,562	-	10,562
Investments	65,787,408	-	65,787,408
Net current liabilities	(420,642)	(3,432)	(424,074)
Long-term liabilities	(72,447)	-	(72,447)
Total funds	**65,304,881**	**(3,432)**	**65,301,449**

Analysis of net assets between funds: prior period

	Unrestricted £	Restricted £	Total £
Tangible fixed assets	2,248	-	2,248
Investments	60,232,572	-	60,232,572
Net current liabilities	(590,254)	-	(590,254)
Long-term liabilities	(164,471)	-	(164,471)
Total funds	**59,480,095**	**-**	**59,480,095**

19. Reconciliation of cash

Reconciliation of net movement in funds to net cash flow from operating activities

	2022 £	2021 £
Net income/(expenditure) for the year (as per Statement of Financial Activities)	5,821,354	18,794,264
Adjustments for:		
(Gains)/losses on investments	(6,977,323)	(19,251,322)
Dividends and interest from investments	(479,237)	(370,667)
Depreciation	1,340	4,180
Loss on disposal of fixed assets	-	-
Increase in debtors	(25,116)	(7,559)
Decrease in creditors	(297,819)	(949,128)
Net cash used in operating activities	**(1,956,801)**	**(1,780,232)**

20. Analysis of cash and cash equivalents

	2022 £	2021 £
Cash in hand	66,158	127,869
Total cash and cash equivalents	**66,158**	**127,869**

21. Analysis of changes in net debt

	At 1 September 2021 £	Cash flows £	At 31 August 2022 £
Cash at bank and in hand	127,869	(61,711)	66,158

22. Statement of funds

Statement of funds: current year

	Balance at 1 September 2021 £	Income £	Expenditure £	Gains/ (Losses) £	Transfers £	Balance at 31 August 2022 £
General funds						
General funds	59,480,095	577,324	(2,318,938)	7,566,400	-	65,304,881
Restricted funds						
Energy Internships	-	1,688	(5,438)	-	-	(3,750)
STEM Enrichment Partnership	-	21,214	(20,896)	-	-	318
Total restricted funds	-	**22,902**	**(26,334)**	-	-	**(3,432)**
Total funds	**59,480,095**	**600,226**	**(2,345,272)**	**7,566,400**	**-**	**65,301,449**

The restricted funds for Energy Internships has a negative balance at year end because the internships have been committed this year, but the income will be recognised in the next financial year as the conditions for funds required the internships to be completed.

Statement of funds: prior period

	Balance at 1 April 2020 £	Income £	Expenditure £	Gains/ (Losses) £	Transfers £	Balance at 31 August 2021 £
General funds						
General funds	40,685,831	499,428	(2,332,319)	20,627,155	-	59,480,095
Total Unrestricted funds	40,685,831	499,428	(2,332,319)	20,627,155	-	59,480,095

Restricted funds						
Energy Internships	-	2,900	(2,900)	-	-	-
Isle of Wight Primary Science		1,000	(1,000)	-	-	-
		3,900	(3,900)			
Total funds	**40,685,831**	**503,328**	**(2,336,219)**	**20,627,155**	**-**	**59,480,095**

Purpose of funds
Energy Internships – The Energy Internships restricted fund is for donations towards the cost of the internships programme from host industries. The funding will be spent on student's bursaries.

STEM Enrichment Partnership – this fund supports science, technology, engineering and mathematics (STEM) subjects within UK schools, improving the quality of teaching and inspiring young people to pursue a STEM-related career.

Isle of Wight Primary Science – this fund is for donations which may only be spent to support primary science activities on the Isle of Wight.

23. Operating lease commitments

At 31 August 2022, the total of the charity's future minimum lease payments under non-cancellable operating leases was:

Land and buildings

	2022 £	2021 £
Amounts payable		
Within 1 year	12,940	77,640
Between 1 and 5 years	-	12,940
Total	**12,940**	**90,580**

24. Related party transactions

During the year, grants totalling £75,000 (2021: £nil) were paid to Shine: Support and Help in Education. Cameron Ogden is a Trustee of this organisation.

Reference and administrative details of the charity

Trustees
Cameron Ogden (Chair)
Sir Peter Ogden
Lady Ogden
Tiffany Chawner
Edward Ogden
Tim Simmons

Charity registered number
1037570

Principal office
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Bankers
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Investment managers
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The Ogden Trust
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The Ogden Trust

making physics matter

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Registered charity: 1037570

THE OGDEN TRUST

England & Wales - Charity number 1037570

Accounts

The Ogden Trust

making physics matter

Trustees' report and financial statements

for the period ended 31 August 2021

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Reference and administrative details of the charity **Inside back cover**

Cover photograph: Pupils at Our Lady of Perpetual Succour Primary School, former hub for the Nottingham Partnership (legacy), experimenting with forces, creating their own levers and investigating how much effort is required to lift a load. Forces are covered in the Ogden partnership Phizzi CPD programme.

Back cover photograph: Pupils at Radford Primary Academy in Coventry exploring the Ogden Light and Sound resources as we prepare for our 2021/22 Phizzi CPD programme.

Welcome from Chair and Chief Executive

This report is being written as we settle into a new academic year for 2021/22. As we look back on the previous eighteen months it is hard to comprehend the challenges that schools, teachers and students have faced. It has been impressive to see the adaptions and innovations that have been made to continue to engage and inspire; the move online for many events has in fact helped to make some programmes more inclusive and accessible, and this is a positive that can hopefully be maintained.

The schools and teachers that we work with continue to impress us with their dedication, enthusiasm and commitment to inspiring the next generation and bringing meaningful change to physics teaching and learning, even in these challenging circumstances. There can be no doubt about the need for scientific literacy and questioning as we navigate the ongoing pandemic and its long-term repercussions; inspiring and educating our young scientists is fundamental.

This year, we have launched our strategy for 2021–26, reiterating our commitment to enhancing the teaching and learning of physics. The new strategy is an evolution of our current plans and commitments, and we will continue to develop our programmes to make them accessible to those who find themselves most disenfranchised from physics and the opportunities it can bring.

For the next strategic period, we have taken the opportunity to realign our financial year with the academic year so it more closely aligns with our charitable activity. This will help us to better evaluate and report on the impact of our programmes and funding. As a result, this report covers the 17-month period from April 2020 through to the end of August 2021.

We are looking forward to the next year as we work hard to put our strategic objectives into practical action.

Cameron Ogden
Chair of Trustees

Clare Harvey
Chief Executive

Our strategy

The Ogden Trust is a family charitable trust which supports the teaching and learning of physics. The Trust delivers programmes primarily for schools and teachers, as well as working with universities, community groups and employers.

Increase the uptake of physics post-16 by supporting physics education and engagement for all young people (4-18), particularly those in under-represented groups.

School-led partnerships to build

- supportive, collaborative teaching communities
- improvement in physics education & engagement
- enrichment opportunities
- strong environments for physics learning

Support for teachers of physics to provide

- ongoing ptofessional development
- understanding, knowledge & teaching tools
- inspiration, skills & resources for practical physics
- a sense of appreciation & value

Physics opportunities for all through

- leadership, action & ideas
- working with universities, employers & community groups
- equitable access to physics-related enrichment
- understanding & experiencing career pathways from physics

This year, the Trust has launched its new strategy for 2021–26, reiterating our commitment to enhancing the teaching and learning of physics. This strategy will underpin our efforts and consolidate our commitment to challenging stereotypes, expanding access and opportunities, and making physics matter to more people – especially those who are most disenfranchised.

We are making longer-term commitments across our programmes that will allow repeat and prolonged interventions, and we are embedding evaluation that will allow us to understand our impact and refine our approach.

School partnerships remain at the heart of the Trust, and we are building our efforts to work with more schools, established education collaborations and across regions to help bring about real and sustained change in physics education. With the growth of more multi-academy trusts and other partnerships we are adapting our programmes to ensure we can effectively work with these established groups of schools.

Effective support for teachers of physics is central to the Trust's strategy; inspiring and committed teachers in the classroom are fundamental in changing the learning landscape. We are working hard to build our Teacher Network so we can develop meaningful relationships with teachers throughout their careers. Our programmes include knowledge and pedagogical support for early career teachers and professional development opportunities for more established teachers, all designed to help them to feel supported and nurtured in the classroom.

Whilst schools and teachers remain our principal focus, we want to support teaching, learning and physics opportunities that go beyond the boundaries of the classroom. We are continuing to build our relationships with universities, employers and community groups to ensure access to physics-related enrichment and future pathways are open to all regardless of background.

> "We have developed our new strategy on a foundation of experience, collaboration, listening and learning. It demonstrates our continued commitment to the teaching and learning of physics, and our determination to ensure that no one feels excluded from taking physics further."
>
> **Cameron Ogden**
> Chair

Fundamental to our strategy and to our programmes and provision is equity, diversity and inclusion. A programme of training and reflection has been introduced at the Trust this year to address any systemic barriers in our programmes and events. Ongoing care and increased awareness and understanding will help us to mitigate barriers to inclusion, and ensure we take a proactive, strategic approach to inclusion, equity and accessibility.

Priority actions

We will monitor and evaluate the implementation of our new strategic goals and objectives, refining our programmes and developing relationships to help us achieve our mission.

We will continue to implement our evaluation strategy across our programmes, adapting the models, approaches and processes that can be applied to our work to give us the best understanding of the impact we are having.

We will continue to build stronger collaborative partnerships with other organisations who share our objectives so that we can bring our collective expertise (and funding) to address the bigger issues and affect real change.

Our programme of training and reflection will continue and we will seek to action lessons learnt in the process and to ensure we dismantle any barriers that may exist. A paid diversity and inclusion advisory panel will be recruited to include people with expertise and lived experience, who will advise the Trust on how to make programmes more inclusive.

Public benefit

The Trustees have assessed the disclosures made in the Trustees' report and consider that these sufficiently detail the significant activities undertaken in order to carry out the charity's aims for the public benefit. When planning the charity's activities, the Trustees have given regard to the Charity Commission's guidance on public benefit. The Trust's programmes in physics education are beneficial as they are for the advancement of science and education. The majority of the programmes are open application and are therefore available to the majority of schools and teachers in England, meeting the criteria that they must benefit a sufficient section of the public.

Our achievements

September 2020
120
partnerships

2020/21
597
partnership events

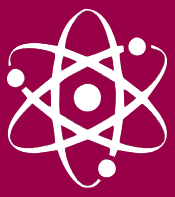
929

schools in Ogden partnerships (685 primary, 244 secondary)

2020/21
Partnership events reached
210,010
people

August 2021
46
Phiz Labs

KS3 Physics CPD
52
teachers



Phizzi forces CPD
72%

of partnership primary schools

Academic year 2020/21
Outreach officer school events reached
15,748
pupils

53%
Outreach events repeat interventions

2021
66 Teach Physics interns
51 schools

2020/21
£167,796
awarded in 52 physics education grants

School partnerships

The Ogden School Partnerships programme is at the heart of the Trust. It operates from Early Years Foundation Stage (EYFS) through to the end of further education, addressing the transitions at each key stage (KS). The programme works predominantly with local clusters of schools and established collaborations, such as multi-academy trusts. We are piloting a strand of regional support through place-based partnerships.

School partnerships (local, established collaboration and regional) work across the phases to encourage sharing of ideas, resources and expertise. The Trust encourages and facilitates schools to focus on:

- teacher professional development to help improve the teaching of physics; empowering teachers so they can inspire their students to take physics further.
- the wider learning environment, including support for technicians and teaching assistants, and investment in physics learning spaces and resources.
- enrichment through family and community group engagement, and networking with local employers to provide a range of broader physics experiences for pupils.

Partnerships receive four years of funding with a further year of transition support to foster sustained partnership activity. A time buy-out for partnership co-ordinators facilitates the initial partnership set-up, co-ordination and reporting.

> The partnership has helped create bonds with science co-ordinators across the schools. These relationships enable us to share news, ideas, resources and generally support each other with our subject leader provision. Through the partnership, we have set up cross-school, yearly events that are now established within our school calendars; our children expect them and look forward to them happening. Without the help, guidance and financial support of The Ogden Trust all of this would have been extremely difficult to achieve.
>
> **Doug Ashton**
> Birmingham Five Ways Partnership (2016-21)
> Teacher, Kings Norton Primary School

In September 2020, there were 120 partnerships in the programme involving 929 schools (685 primary, 244 secondary). Thirty-two of these partnerships joined the programme in 2020. Seventy-two per cent of our new partnerships took the time buy-out, an important step towards building an effective and sustainable partnership. Thirty-one of our new partnership co-ordinators joined our online induction meeting which helps the partnerships to build from a solid foundation. The meeting provided a thorough understanding of the programme, and advice on how to develop efficient processes and deliverable plans.

Discussions to make our partnership action plan worked well to draw subject leaders together and the shared aspirations gave a real focus to drive the provision for students. We are a mix of schools covering pre-EYFS to A-level so ensuring transition is effective is a priority, as is creating opportunities to raise aspirations for future STEM careers.

From a personal perspective, I wanted to study physics to degree level but struggled beyond GCSE. Eventually I studied biology at university instead. I have met some brilliant people through The Ogden Trust who have been able to (re-)explain physics concepts simply and demonstrate them effectively. I know that as I learn and make sense of physics, my students also learn, and I don't want any aspiring future physicists to miss out as I did. Raising teacher confidence in teaching physics leads to raised student confidence.

Andie Hughes
Leek Partnership (2020–)
Teacher, Rushton First School

The Tameside Partnership is the first Ogden regional support project, established to have a far-reaching and lasting impact on schools across Tameside. Tameside is one of the 20 per cent most deprived districts/unitary authorities in England and about 20 per cent (8,800) of children live in low-income families.[1] The regional partnership is led locally by two Ogden-funded co-ordinators, who works with smaller local clusters of schools across the region. Priorities and objectives are established to meet the needs of the clusters, and the partnership is supported by expert teachers and practitioners.

Within the regional support partnership local clusters of schools will be working together. Primary schools will identify their top three priorities for physics, and I will develop an action plan – links between key stages, raising science capital and increasingly family engagement are likely to be high on the list, all underpinned by collaborative learning and events, shared resources and ideas, and Phizzi Continuing Professional Development (CPD) . Several of the primary schools in the region are using Ogden funding for their Primary Science Quality Mark.

Clusters of secondary schools in the region will be taking part in Ogden CPD and have already taken part in shared learning experiences with a focus on careers. With the added pressures and restrictions of the pandemic, engaging schools has been difficult, but momentum is building and the partnership will hopefully bring meaningful changes to physics education in Tameside.

Olivia Hardy
Tameside Project Co-ordinator (primary)
Olivia works alongside Wayne Tabernor who is co-ordinator for secondary

The Trust has been actively recruiting for new partnerships in rural and coastal areas, and in areas of social deprivation. In previous years we have focused on schools with a higher-than-average free school meal percentage, however partnerships recruited for 2020/21 were assessed and considered under additional indicators of disadvantage. These include remote rural areas (Berwick, Craven and Bodmin), deprived coastal areas (Folkestone and Weston-super-Mare)

[1] https://psnc.org.uk/greater-manchester-lpc/wp-content/uploads/sites/118/2018/07/Tameside-1.pdf

“The enthusiasm of the teachers had a big impact on me personally. It made me feel so proud of the great science work going on in other schools and has inspired me to try new things.”

In 2020 and 2021, the annual partnership meeting has been convened online. More than 120 teachers joined us over the course of two afternoons in Summer 2021 to learn from expert practitioners and to share ideas.

Partnership meeting attendee 2021

We have a high percentage of pupils on free school meals, and have a real opportunity to reach pupils that live in areas of high deprivation with low science capital. Our first-year plans were disrupted by COVID but we have built physics and physics pedagogy into virtual teach meet sessions to raise the profile of the subject and we have developed physics libraries to share across the schools. We are (re)planning activities to improve science capital for pupils from low-income households and working hard to increase aspirations and social mobility through raising awareness of STEM careers. We are hoping to encourage pupils in physics (and science) from a young age through school events and by building relationships with families, communities and local businesses; longer-term we hope to see an uptake of separate physics GCSE and physics A-level within our schools.

The Ogden funding and support is enabling us to develop strong link between physics teachers across Manchester and create a cause that is rooted in making physics matter to our young people. It has been inspiring to share a passion for physics and speak to teachers with a range of experiences and backgrounds. I feel excited for what this year holds for our partnership and know we will be able to make a difference to the next generation of physicists.

Daniel Walker
Didsbury Partnership (2020–)
Physics Teacher, Didsbury High School

and cities or towns based in areas that have high deprivation on the Index of Multiple Deprivation (IMD) scale (Nuneaton, Swindon and Warrington). In these areas, young people may face one or more barriers to participation in science including lack of local opportunity, lack of aspiration, lack of local jobs and lack of role models in science and scientific careers.

Professional development

Ogden continuing professional development (CPD) is an important component of the partnership programme with development opportunities available for teachers from EYFS through to KS4 (Years 10 and 11, when pupils are aged between 14 and 16).

Between April 2020 and June 2021, nine online Phizzi Forces CPD events were held for primary schools in our partnerships, including sessions for Science for Light & Chadwick Trust. The events reached 110 teachers from 61 schools and concluded our forces CPD programme, which was delayed with school closures and COVID restrictions. Despite the disruption, 72 per cent of our primary partnership schools took part in the forces CPD and overall, teachers attending the sessions showed a 3.6 increase in confidence (confidence marked on a 1-10 scale) in working scientifically and a 3.4 rise in their knowledge of forces.

Our early years CPD, Science Talk, was also delivered online to new partnerships during 2020/21. Five sessions were held for 85 teachers and teaching assistants from 22 of our first-year partnerships. The Science Talk attendees received a box of 39 resource cards to support the practical hands-on activities in their setting, developing communication and language skills through science enquiry.

As partnerships enter their legacy phase, a further CPD module is now available to encourage primary schools to think about their next steps and how to incorporate their Phizzi enquiries into future action plans. Phizzi Forward provides an opportunity for schools to reflect on how their Phizzi CPD is being implemented, how the resources are being used and how teaching and learning has improved. The Light and Sound CPD programme was postponed and will now be delivered during the 2021/22 academic year.

Investigating the UV scale as Phizzi Light and Sound is finalised.

This year, 10 teachers from three schools took part in the new KS3 Physics CPD for non-specialist physics teachers. It was excellent CPD that has had a real impact in the classroom, enabling much greater understanding and increased confidence for non-specialist teachers at KS3 and KS4. One school has rewritten their KS3 scheme of work to include these approaches and ideas, they said:

> After the excellent CPD session, the key ideas were shared with the rest of the department during one of our weekly department meetings. Immediately, some of the ideas were put into practice in lessons. The major takeaway was making the links between the concrete examples we use when teaching forces and the free body diagrams by simply having a stash of laminated force arrows to add to different scenarios.

Another school has built the learning into their schemes of work. The fantastic resources sent with the CPD training have helped bring learning alive and supported visualisation of the concepts – helping to put the fun and excitement into forces!

Since the CPD training we have welcomed another school into the partnership and shared the training and resources with them. They are a special school and the practical activities and strategies have been invaluable.

Dr Becky Parker
Tunbridge Wells Partnership (2020-)
Teacher, Benenden School

A new blended learning course was piloted this year, that the Trust has devised and delivered in partnership with the Open University. Teaching Forces supports teachers to develop their KS3 subject knowledge and pedagogical approaches for teaching physics. The course is divided into eight sections, normally spread over eight weeks of blended learning. The pilot programme for Teaching Forces had to be delivered entirely online; participants received a digital badge and certificate to add to their professional development portfolio.

> "Lots of great ideas for teaching difficult concepts both practically and conceptually."
>
> "As an Ogden partnership I will be recommending that as many non-specialist teachers complete this course as possible."
>
> **Teaching Forces Blended Learning attendees**

CPD available to all partnership schools

EYFS Science Talk:
a half-day CPD session supporting communication and language through understanding the world

Phizzi CPD:
part of four-year CPD programme covering one of the main areas of primary science (physical processes) with lesson ideas and resources

2021/22: Light & Sound	2022/23: Earth & Space	2023/24: Electricity	2024/25: Forces

KS3 Physics:
twilight physics workshops and resources for non-specialist science teachers

Term 1: Forces	Term 2: Waves	Term 3: Electricity

Blended Learning CPD for Teaching Physics:
ideal for non-specialist teachers, to support development of subject knowledge and pedagogical approaches for teaching physics at KS3 and KS4

Forces	Electricity	Energy

School culture

Building a culture of science within schools, with positive environments for physics learning and supportive and collaborative teaching communities is important to developing the physics learning landscape. The wider learning environment, including support for technicians and teaching assistants, and investment in physics learning spaces and resources, is an integral part of our partnership programme.

After a successful first year, each school partnership with more than one primary school has the opportunity to open a **Phiz Lab**, creating a primary science environment to support teachers and engage pupils. The Phiz Lab programme is part of our ongoing strategy to help raise the profile of science, enhance pupil science capital and develop working scientifically skills.

Recent evaluation* of our Phiz Labs has shown that they generally have a positive impact on the status of science in school and the wider community, with improved school culture in relation to science learning and teaching and more practical pupil-led enquiry. A correlating impact on attainment in science is less evident. The new Phizzi Forward CPD aims to address and mitigate this, helping to ensure resources and learning from curriculum CPD are embedded and built upon, and ultimately reflected in student outcomes.

Since 2012, grants have been awarded for 46 Phiz Labs in schools across England and five Phiz Lab on Wheels (a dedicated science trolley equipped with resources to support classroom physics and STEM clubs, in schools that do not have the space for a classroom lab). Two new Phiz Labs have been opened since April 2020, with grants awarded to a further seven schools. Four

When school fully re-opened, I was determined that our Phiz Lab would be used; it is a happy place for so many of our pupils and it has remained the hub of science within the school. A new Phiz Lab timetable, and some rigorous processes for cleaning and quarantining equipment, meant that children from every bubble were given practical opportunities in the Phiz Lab using scientific enquiry and skills for working scientifically to carry out all sorts of investigations – classifying materials, phases of the moon, soils and rocks, floating and sinking and so much more.

On returning to school some pupils were anxious and unsure after spending so much of lockdown at home. It was imperative that we got the lab up and running, as this is a place the children love to be. By sparking their curiosity through science in the lab it gave pupils a sense of normality, and of course, a chance to get back into role each week as scientists!

Laura Marshall
Science Lead
Our Lady & St Kenelm Primary School

*Amanda Poole, School Culture Lead for the Trust, is completing an Ogden-funded PhD on 'Understanding the impact of science laboratories in English primary schools' (University of Warwick).

of these labs are on schedule to open in 2022; progress for the remaining three has been delayed by COVID restrictions and complications.

Technicians in secondary schools in Ogden partnerships have access to support from two Ogden technician leads. As well as sharing news and information across the Ogden network, their roles typically involve visits to schools to deliver on-site workshop training days and bespoke physics equipment training. During the COVID restrictions, the Trust launched a pilot online clinic to support technicians in partnership schools. The clinics offered bespoke online sessions for technicians navigating a very different approach to practical physics. The technician leads are continuing to build links with primary schools and developing an initiative to engage pupils as 'junior technicians.'

Enrichment

Over the past academic year (2020/21), our partnerships have shown resilience and flexibility in their approach to partnership enrichment activities, developing initiatives that could work online or in smaller school/class bubbles whilst still building science capital and engagement. Several partnerships launched new science libraries, held online careers events and ran virtual science fairs.

In 2019/20, partnership events were significantly impacted by COVID but still reached over 70,000 people including students, families, teachers, technicians, teaching assistants and the wider community (in 2018/19 the figure was 105,978). In 2020/21, despite ongoing restrictions, this number increased to 210,010. One hundred and one of our partnerships have reported on their partnership programmes, with a total of 597 activities completed and a spend of £157,082; this gives an active spend per partnership of £1,556 and a per person cost of less than 75 pence.

Bodmin Partnership

Partnership enrichment activities

Participants	2020-21
EYFS	14,551
KS1	46,807
KS2	96,412
KS3	17,758
KS4	14,308
KS5	1,746
Parents	10,953
Teachers	6,173
Technicians/teaching assistants	964
Community/other	338
TOTAL	**210,010**

The availability of online events has contributed to increased participation with high numbers able to access virtual workshops and shows. Partnership activities, such as science fairs and physics photo competitions, were able to engage high numbers during lockdown; likewise, new physics/science libraries have been made widely available in partnerships boosting participation numbers.

Schools are encouraged to work towards a sustainable partnership, developing activities, resources and ideas that can be continued once the full partnership funding has ended. The Trust encourages and supports activities that develop students' science capital, increase careers awareness and enhance engagement with families and the local community. Science Ambassador schemes are popular and feature in our range of How to guides in our resources; the Trust* contributed to the STEM Learning ambassador handbooks, which can be used alongside the Ogden guide and resources. Physics libraries and book clubs are also a popular, sustainable and long-term investment for schools. Nearly 20 per cent of our partnerships have an ambassador programme; nearly a quarter have book clubs and 25 per cent held a science fair in 2020/21.

Secondary schools in current or legacy partnerships are eligible to apply for funding to support students to attend trips to CERN. The funds are directed to support those students would otherwise be least able to participate, due to their financial circumstances.

Trips to CERN are educational and inspirational. As well as giving students (and their accompanying teachers) a greater understanding of the particle physics involved in world-class research,

Our Ogden partnership has been an excellent opportunity for us to work collaboratively with other schools in the area. Working as part of an enthusiastic, supportive and forward-thinking team has supported our development, challenging us to question our delivery and provision of science, and always ask ourselves, how can we improve this? Staff are growing in enthusiasm and our children have noticeably seen the profile of science raised, both in terms of lesson delivery and extracurricular opportunities.

More than 200 families took part in the marvellous marble challenge that we ran during lockdown!

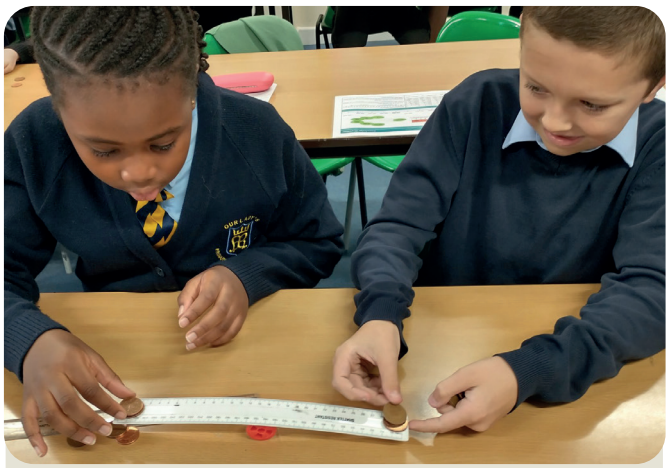
Going into our second partnership year, we are focusing on transition between KS2 and KS3, working to ensure local schools work together so that high quality teaching is being delivered across the schools in our partnership. In our primary schools we will continue to up-skill teachers, ensuring they have a more secure subject knowledge and the resources to go alongside this. We are also planning activities to build the science capital of our students, including science ambassador programmes, star gazing, and playground science.

Nashim Prabatani
Swadlincote Partnership (2020-)
St Edward's Catholic Academy

*Ogden Teaching and Learning Lead, Jackie Flaherty was lead author on the STEM teacher guide.

Warrington Partnership photo competition showing refraction – when light passes through an object with a higher density causing the rays to change direction.

The North Cambridge Academy (part of the Ogden North Cambridge Partnership) runs a science book club for Year 7 and Year 8 students.



The legacy of our partnership is evident in the teaching of more well-resourced science lessons for our children that consider their disciplinary and substantive knowledge. The science co-ordinators are still constantly sharing useful ideas and resources for more successful scientific enquiry and better assessment of children's scientific understanding. We have improved the wider opportunities for our children in their homes and in school that encourage more parental engagement. All the members involved in the partnership are still keen to continue implementing and embedding high-quality science education within their school curriculums.

Ellen Flynn
Nottingham Primary Partnership (2015–2020)
Acting Deputy Head, Our Lady of Perpetual Succour Catholic Primary School

CERN showcases a range of careers connected to physics and students can use their experience to inform future education and career choices. Unfortunately, it has not been possible for any partnership trips to CERN to take place this year.

Priority actions

As schools are increasingly affiliated to larger academies, we will continue to review and adapt our partnership model to ensure we can work across and within these education trusts. We will continue to evaluate the effectiveness of our regional support model and expand this approach if

it delivers advances in physics teaching and learning.

The development of CPD provision will continue as we build depth and confidence across the key stages from EYFS through to KS4. We will encourage participation in the KS3 Physics CPD and blended learning, where we will expand the modules available. Science Talk will be revised to reflect changes in the new early years framework and to make it more deliverable online. The Phizzi CPD provision will be reviewed and refined to ensure it can be easily used by schools that teach children with special education needs.

Phizzi Forward and Phizzi Future CPD modules will be more securely embedded into our partnerships to re-affirm ongoing professional development and to progress leadership potential in the classroom. School science leadership tools are also being developed so primary teachers can more easily monitor, scrutinise and improve provision and learning.

Primary Physics Professional Learning days will be held as a way to start relationships with schools and teachers in areas where we would like to establish new school partnerships.

The Phiz Lab on Wheels programme will be expanded to ensure the benefit of the lab resources are experienced more widely across schools and not just centred around a classroom Phiz Lab.

We will be piloting a scheme to develop technician communities of practice

The Trust is working with The Lightyear Foundation to ensure resources are more accessible to all learners.

to support physics specialist science technicians and a science specialist TA programme in primary schools.

We continue to embed the evaluation framework across partnership reporting so we can more clearly understand impact and effectiveness, and can ensure that resources are channelled to the areas of most need.

The Bodmin Partnership (2020–) includes eleven primary schools from the Kernow Learning Trust Academy and is led by Simon Rowe; they are all located in rural, isolated and deprived parts of Cornwall, where aspirations and prospects can be limited.

When the pandemic hit, plans were rapidly adjusted to work in the new world of lockdowns, class bubbles and online teaching. Many of the changes, such as having partnership meetings online, running a science fair virtually on FlipGrid, and 'science busking' on the schools' social media channels, have proved to be really successful. Online activities have allowed many more children, teachers, and families to participate, without space, time, or travel limitations.

Each school has appointed children as science ambassadors: promoting science; speaking in assembly; and sharing science facts and experiments. Take-home 'science sacks' have also been popular, engaging pupils and families in practical activities and raising the status of science outside of school.

Whilst there were already good links between teachers, the partnership has provided more regular opportunities to share ideas, good practice and support each other. As Science Lead for the Trust's Teaching Hub, Simon is well placed to help them develop their confidence, subject knowledge, and skills. The schools have all adopted a 'wow how now' approach to teaching science, which has been embedded in the curriculum.

All these initiatives have contributed to an enormous boost for the profile of science, broadened children's aspirations and increased their science capital. As one teacher says: "A wider school focus and love of science has been created and we have seen a much higher engagement in the subject across pupils, teachers and parents". Teachers report that more pupils enjoy science and are motivated to engage with the subject.

Simon thinks that the key to their success so far has been having long term aims. He says: "The partnership is about much more than just events and activities. We are thinking about what else we can do for sustained outcomes, such as improving the curriculum and upskilling everyone to teach quality science. We want to use this partnership as a spark to ignite something bigger!".

Simon's passion and leadership has been the foundation of the partnership's success, but high-level practical and strategic support from the MAT's senior leadership has been critical too. Jennie Walker, CEO of Kernow Learning, sums up the value of the partnership "Despite the COVID difficulties it has been great. The additional expertise, dedicated leadership time, access to resources and funding really makes a difference."

Evaluating and understanding our partnerships and their local impact is important. This case study has been produced by Dr Alison Rivett, Evaluation Consultant, who has been working with the Bodmin Partnership to better understand their objectives, processes and achievements.

Teacher support

We have several programmes in place to help us build meaningful relationships with teachers throughout their careers. The conversation starts with Teach Physics internships for physics undergraduates who might be considering a career in teaching and continues through the Teacher Network which offers career-long support for teachers of physics.

An online collection of resources is also freely available to support the delivery of physics in the classroom, these resources are mainly aimed at primary physics but also offer ideas and resources throughout the key stages.

Teach Physics

After a hiatus in 2020 when no school placements were possible, 66 Teach Physics interns completed their placement at 51 schools in Summer 2021. All but two of the interns completed an evaluation survey at the end of their placement: all respondents said they would recommend the scheme and the majority stated that they were now more likely to enter teaching upon graduation or later in their careers; 19 per cent of respondents indicated that they will definitely be doing teacher training after graduation; six per cent have already signed up for teacher training to begin this autumn. The majority of applicants were in their second year at university and had previously attended non-selective state schools.

> “The Teach Physics internship has been absolutely incredible for me. It has helped me to confirm my passion for teaching and helping young people and has given me a solid idea of where I want to direct my future. Teaching, whilst not always glamorous, is one of the most rewarding things I have ever done.”
>
> **Teach Physics intern 2021**

Teacher Network

Our Teacher Network offers regular professional development opportunities as well as three specialist themes of support for teachers of physics: early career support; education research; or leadership in teaching physics. We have 674 people signed up to our network, which includes current partnership teachers.

Eight teachers, in their first five years of teaching in 2020/21, took part in our **Early Career Teacher Development** programme. The teachers received funded timetable release time and were provided with high quality mentoring and support. At the end of the programme, participants felt more confident in understanding physics and teaching physics at a KS3/4 level, as well as advising other colleagues. Participants also received a budget allocation for further CPD courses but, in part due to COVID, the fellows found they were not able to fully utilise this benefit.

A new pilot KS3 Physics programme was launched online as part of our early career support for our first-year partnerships. The programme focuses on key physics concepts and pedagogical approaches; it has been designed to support non-specialist teachers and to ensure progression in KS3 (Years 7, 8 and 9, when pupils are aged between 11 and 14) physics. Fifty-two teachers took part in the programme which launched in October 2020. It included three termly twilight sessions which were led by regional mentors and covered forces, waves and electricity. The sessions provided engaging and challenging classroom approaches, and each topic included a supporting box of resources and books so that teachers could easily take the new ideas straight into the classroom.

> “It really made me understand some physics concepts and ways to teach them.”
>
> **SKE student**

In May–July 2021, the Trust delivered six online one-hour CPD sessions in partnership with the University of Sussex for their subject knowledge enhancement (SKE) students. The sessions covered the key concepts of forces, electricity, energy, and waves and across all the sessions pedagogical considerations, relevant across physics teaching, were highlighted and exemplified. A total of 77 students attended over the six sessions, and evaluation feedback suggested all respondents would recommend the Ogden SKE series, which are embedding good physics teaching practice.

Teachers are able to apply for a limited number of **education research** opportunities to help them build knowledge for themselves and the wider education sector. The Trust offers scholarships for suitable master's courses and part-time PhD programmes for practising teachers. Three teachers completed their studies this year (two master's and one PhD – officially completed on 1 September 2021); the Trust is now supporting four master's students and four PhD students. Three teachers took part in a pilot programme to support practice-based enquiries to help develop practical solutions to address issues identified by the teacher.

Senior Teacher Fellowships are awarded to teachers who have demonstrated exceptional commitment to physics education. As part of the fellowship, teachers plan and implement a physics education project, develop projects that deliver sustainable high-quality physics education to students, develop resources that can be made available to other teacher fellows or partnership schools and develop a plan for the sustainability of the project.

This year, we had eight senior teacher fellows; five primary school teachers were participating in the science capital research project and three teachers were working towards their own projects. The three independent projects have all been affected by COVID restrictions, but feedback

I am working closely with my team of teachers across the St Alphege schools to trial and develop a new Phizzi Curriculum to deliver a complete KS1 and KS2 science curriculum that covers the wow and the how.

In line with recommendations, the Phizzi Curriculum allows for each child in the school to have a two-hour science lesson every week which incorporates both a short, taught aspect where the teacher introduces, demonstrates and assesses the key scientific knowledge being developed, followed by an extended enquiry where pupils have the opportunity to apply, secure and deepen these scientific ideas while practising and developing their working scientifically skills.

We are very carefully planning the working scientifically learning opportunities so that learners are regularly exposed to all of the different types of scientific enquiry and get repeated opportunities to develop all the specific skills related to reporting, measuring, analysing, supporting, justifying and evaluating ideas. The Phizzi Curriculum also aims to support the development of children's science capital with contexts for learning being linked to real-life situations so that children can see the relevance and importance of science.

Emily Fryer
Ogden Teacher Fellow (2020-)
Science subject lead
St Alphege Church of England Schools

Emily is working in collaboration with Ogden Culture Lead Amanda Poole and Ogden Regional Rep Jane Catto to develop the plans and resources.

suggests they have still raised the profile of science in schools, and the projects are ongoing. Teachers can now reapply for their fellowships to continue for two years to embed changes and build sustainability.

Resources

The Ogden Trust resources have this year been evaluated by The Association for Science Education (ASE) – the foremost body for science education across the UK – and they have been awarded the ASE Green Tick. Ogden resources are freely available online and include a range of primary and secondary resources for physics teaching and learning, as well as guides to encourage and develop physics in school. ASE Green Tick quality assurance is carried out by ASE experts to support teachers as they explore and navigate a wealth of online science resources. The ASE Green Tick provides guidance on the suitability of resources and how the materials might support teaching and learning.

Collectively, our resources have been downloaded nearly 40,000 times over the past 17 months (April 2020-August 2021); our working scientifically resources remain the most popular and they have been downloaded more than 14,500 times.

Year 6 pupils at St Matthew's Catholic Primary School using Ogden research cards.

Priority actions

During the autumn term the Trust will be sending out a destination survey to previous Teach Physics interns to gather information about whether they have gone into teaching. We will also be reviewing how accessible the scheme is and updating policies and guidelines as required to ensure that we are inclusive – this includes looking into how schools can better accommodate disabled interns.

Following the national roll-out of the Department for Education's early career framework, the early career strand of the Teacher Network will in future consist of two programmes with no time buy out for the teachers on the programmes. Teaching Core Physics will provide participants with half-termly regional mentoring groups and Developing Physics Specialism will provide bespoke individual mentoring to early career secondary physics teachers with a physics specialist timetable.

We will work to grow the uptake of our early career provision including ongoing work to provide sessions to school centred initial teacher training (SCITT) and subject knowledge enhancement (SKE) courses to help build expertise and confidence in teaching physics.

In light of the new national professional qualifications (NPQ) announced for teachers and leaders who want to develop their expertise in specialist areas of teaching practice, we will be growing the leadership in teaching physics strand of our Teacher Network.

We will continue to develop our resources to ensure that we contribute to a more representative and diverse physics story, adding new voices instead of perpetuating and repeating the historical story, which is often dominated by white, male physicists. We will also review our pdfs to make sure they are easily accessible to anyone using assistive technology.

Opportunities for all

The Trust is working to ensure that access to physics-related enrichment and future pathways are open to all regardless of socio-economic constraints. We are expanding and supporting opportunities for universities, employers and community groups to engage with young people, taking physics beyond the classroom and giving an insight into the real-world application of science.

University engagement

The Trust continues to work with physics departments in universities across Great Britain via a network of outreach officers who are (or have been) part funded by The Ogden Trust. The Outreach Officer programme provides funding for a fixed three-year period during which time the Trust works with the department to support them to deliver a strategic outreach programme, ideally with the outreach position established as a permanent role. Seven outreach officers reached the end of their funding during 2020/21.

There are currently nine outreach officers who still receive funding (one currently on maternity leave), but the programme is not funding any new outreach officers and we are transitioning towards a broader more sustainable engagement with university physics departments and physics outreach professionals.

The work of outreach officers has been significantly impacted by the pandemic and the COVID restrictions that have been put in place. In 2020, outreach officers still held 780 events. This included 585 school events reaching 53,406 pupils; 86 events involving 1,042 teachers from 492 schools; and 181 events for university students which reached 2,292 students. However, the impact of the pandemic was already being felt and over 200 events were cancelled in 2020.

In 2020–2021, the work of outreach officers continued to be significantly impacted by the pandemic and COVID restrictions. However, outreach officers still held 235 separate events, of these 194 were online, a significant shift from previous years. The remaining ones have been held in open public or on-campus spaces. These events have included working with 545 schools and colleges, reaching 15,748 school pupils; delivering 15 teacher events, involving 1,042 teachers from 125 schools and colleges; and 62 events for university students which reached 2,544 students. Fifty-three per cent of these events were part of a series of repeat interventions. These types of interventions are likely to leave a greater impression on the pupils (one-off events have not been proven to have an impact on increasing the numbers of young people choosing to take up physics post-16).

In March 2020, we hosted our annual Science Discovery Day as part of British Science Week. The online event reached a huge online audience with 17,281 views.

Dr Simon Reynolds
Ogden Public Engagement Officer
St Andrew's University

School closures, lockdown and working from home, significantly changed outreach commitments with more events cancelled or moved online. The Ogden outreach officer network came together virtually to support each other and share best practice and useful resources; working groups across the network took the opportunity to consider departmental strategy, evaluation, public engagement opportunities for undergraduates, science communication modules, online summer schools as well as the Year 13 mentoring programme.

During the past year, the Trust commissioned an online Outreach and Public Engagement (OPE) leadership programme with the Science and Technology Facilities Council aimed at those in leadership positions in

university physics outreach. There were two additional webinars for OPE leadership programme attendees and also an invited audience from the wider sector. The talks explored 'leading and delivering outreach online' and 'taking a strategic approach to outreach' and had 63 attendees.

As an Ogden outreach officer, I have been able to establish excellent links and build great lasting relationships with many schools and teachers across the whole Merseyside area and beyond. By training and supporting undergraduate and postgraduate students in developing and delivering outreach we have a huge amount of resource, variety and flexibility.

Not only has our outreach reached many thousands through our audiences, predominantly school students of all ages, but we have been able to embed the 'physics outreach provision' into our annual faculty outreach programmes. Over time, we have become a well-known and expert resource to our department, faculty and to the wider university – we provide delivery of events, support and share excellent practice and advice to others who are interested in developing their own outreach programmes and activities.

During the outreach officer funding, we developed a full outreach strategy that has helped focus our planning in line with identified desired outcomes. Although our Ogden funding has ended we plan to remain part of the network and continue collaborations and sharing excellent practice.

Sarah Annand
Physics Outreach Co-ordinator & Physics Student Support Team Leader
University of Liverpool

Outreach officers currently apply for a grant to run an annual School Physicist of the Year (SPOTY) event. The events recognise and celebrate excellent physics students, particularly those who have overcome difficulties through hard work and enthusiasm for the subject. In 2020, there were no face-to-face events, and only seven online celebrations; in 2021 a similar pattern was repeated (with one held face-to-face and three held online). Funding for these events is being phased out.

A new publication – **Taking a strategic approach to outreach** – has been produced to explore a range of approaches for the strategic leadership, management and delivery of outreach. The guide includes top tips to inform the process and case studies, drawn from our outreach officer network, to give an insight into real-life experiences. Our evaluation toolkit is still being implemented by the officers to develop appropriate evaluation for their programmes, according to their department needs.

In 2020, outreach officers were instrumental in the development and launch of a new mentoring scheme run in partnership with Brightside. The online mentoring programme was initially conceived in response to school closure and exam cancellations. Teach Physics applicants, who could no longer take part in placements, were offered the opportunity to mentor school leavers preparing to study physics at university.

One hundred and seventy-three students preparing to study physics at university were involved in the first online mentoring scheme, working with 95 current undergraduates. Seventy-eight per cent of the students felt better prepared for university after taking part in the programme. Following the success in 2020, the scheme was reviewed, revised and revisited in 2021. A smaller, shorter programme was facilitated with 39 students matched with 21 undergraduate mentors from 13 universities. Although participation numbers were lower, the

outcome was similarly effective with 79 per cent saying they felt conversations with their mentor helped them to think more clearly about their future at university and 96 per cent strongly agreeing they enjoyed the programme.

> "My mentor massively raised my confidence. They made me feel much less worried about moving to a new city/ environment and starting lectures. They explained so much about the work you do on the course. They gave me a great idea of things to look out for at university regarding future careers and what to add to my cv or LinkedIn profile."
>
> **Preparing for University participant**

Priority actions

We will continue to work with our outreach officer network post-funding, engaging more widely with professional staff working on outreach in university physics departments and research.

A university collaborative outreach project funding initiative is being launched. An outreach awards scheme is also being developed to recognise, celebrate and reward achievements in outreach.

We have funded a research project looking at outreach leadership and this will be published in 2021/22.

An external evaluation of the outreach officer programme has also been commissioned but is not due to report until January 2023. This research and evaluation will inform our ongoing plans to support university physics outreach.

Employer engagement

Engaging with employers can provide a tangible connection between physics and future careers, highlighting the many and varied pathways that can emerge from studying physics and STEM subjects.

The **Coastal Energy internship programme** is one way that the Trust is engaging with employers and working in priority areas of deprivation – many coastal areas in England are facing socio-economic challenges. The internships provide bursaries for Year 12 and Year 13 students to undertake a summer placement in the energy sector and provide a vital springboard into future possibilities. The internships are currently run in partnership with seven education providers.

In 2020, as a result of the pandemic, Coastal Energy research projects were launched instead of placements. In 2021, the research model remained in place, with four energy companies offering projects with resources, mentoring and support. The programme was delivered through online classroom sessions, videos and independent research. Twelve students completed the programme and submitted their final projects for Gold CREST Awards. Although the project model has not reached as many students, it has provided a valuable continuation in our engagement with the sector, and with the local colleges and their students.

Priority actions

We will re-establish links with businesses to facilitate the return to placement-based internships and will gradually increase the number of internships available each year. We will work to progress a co-funding model with the participating companies to reinforce value and build longer-term viability.

We are developing programmes and initiatives to work more closely with employers and community groups so we can expand opportunities in physics to more people using different channels.

Grants

In line with our strategy to increase the uptake of physics at post-16, particularly for under-represented students, the Trust awards funding to projects outside of our core schemes which are aimed at improving the teaching and learning of physics.

There are three **physics education grant** application windows throughout the year for small grants to support the teaching and learning of physics; all applications and reports are completed online. The grants are wide-ranging and support new ideas as well as established good practice. Many of the grant award activities have been disrupted by COVID but other plans and programmes have been adapted. Since April 2020, 52 grants have been awarded to the value of £167,796.

More than 50 per cent of our physics education grants are made to schools and teachers for physics resources and school initiatives. Through educational research and past experience, we know that giving equipment without relevant support and training doesn't maximise the impact of this funding, so funding is often accompanied by time and expertise from Ogden consultants. Through these grants, one school now has an established A-level physics department, and the Trust is currently working with three more schools and colleges to start their physics A-level provision. We are also working with two new schools to ensure they have sufficient KS4 physics provision as students move through the year groups.

Further to our physics education grants, an additional four grants were made to organisations supporting other charitable interests of the Trustees; these grants are not open for applications and are solicited directly.

We wanted to set up an A-Level physics department at Ricards Lodge High School as we were losing a significant number of our more able students to other sixth forms. We did offer physics, but students had to take it at our partner school rather than at Ricards Lodge.

Henry Hammond* helped me construct a scheme of work; his knowledge of both the GCSE and A-level physics course allowed us to streamline our needs and identify immediate areas of training to focus on.

Our first A-level cohort consisted of 10 students; the second had 11 students. We currently have 18 A-level physics students in Year 13 and nine in Year 12. All our first cohort achieved grades between A* and C (of these, 40 per cent achieved A*-A, and 86 per cent achieved A*-B). Ninety-one per cent of our second cohort achieved grades A*-C (of these 82 per cent A*-B and 45 per cent A*-A). Students have gone on to study physics, natural sciences and engineering at university.

Without guidance, navigating the process to set up a course from scratch would have been time-consuming and costly, and we would not have been as prepared without the recommendations for continuing professional development (CPD). Henry's experience in running an A-level physics course was invaluable and he was able to inform us which equipment we really needed. I am very grateful that he has allowed me to pick his brain on so many occasions.

James Scragg
Physics teacher
Ricards Lodge High School

*Henry Hammond, Physics Leadership Lead for the Trust, and Science Director at Alexandra Park School.

As of September 2020, 34 undergraduate students studying physics or a related subject were receiving an Ogden scholarship; 14 of these students completed their studies in 2021. The remaining scholars will be supported until the end of their current degree programme, but no further scholarships are being awarded. In 2020, the Trust funded 11 alumni internship placements, and in 2021 funding for a final two placements was made available through our physics education grants. This funding is no longer available.

The Lightyear Foundation has received funding from the Trust to deliver science -themed active workshops and lesson plans to help break down the barriers and get more disabled people into STEM.

Our grant awards and our central programmes are informed by our ethos. We want to encourage the development of collaborative and inclusive communities of teachers and physics educators, which support the needs of teaching and learning communities, and facilitate sustainable and meaningful change in physics education.

Collaborative working

Recognising teachers' expertise

Listening to our community

Building long-term relationships

Developing and sharing evidence

Research and communications

The Trust is raising its voice in the physics education arena, talking about our own programmes and initiatives, collaborating on wider research to inform the broader physics education community and commissioning independent research.

Alongside the Primary Science Teaching Trust (PSTT) we have been jointly supporting the **Primary Science Capital** research collaboration between University College London and King's College London. We have also funded five primary school teachers to participate in the project; the Primary Science Capital Teacher Handbook will be published in Autumn 2021.

In collaboration with SEERIH, at the University of Manchester, we have published research into the **10 Key Issues with Children's Learning in Primary Science in England**. The report provided pertinent insights into the national context of primary science education, highlighting how far too often primary pupils' science learning prioritises 'wow' moments without clear reference to any curricular goal.

A strong foundation in primary science is crucial to developing and delivering high-quality school science curriculums throughout the education system. The SEERIH report was cited in the Ofsted Research Review Series: Science which identified factors that can contribute to high-quality school science curriculums, assessment, pedagogy and systems. Following on from this research a second phase is already underway looking at how learning from the research can be implemented in the classroom.

Our programmes and our research are giving us a more prominent and influential voice in physics education and our communication channels are increasingly active. Our engagement on social media, especially Twitter, continues to increase; over the past 17 months, 801 new people have followed us on Twitter and at the end of August 2021, we had 4,375 followers. Our followers on Facebook have increased to 1,430. These platforms enable us to contribute to conversations and engage with a wider audience to share news, ideas and practice from across our programmes.

We have commissioned several accessibility reviews with the Royal National Institute of Blind People (RNIB) this year. This has led to an extensive redevelopment of the Ogden website to ensure we are adopting best practice with regards to our web presence and online communications.

Priority actions

Following the launch of the Primary Science Capital Teacher Handbook we will be funding University College London and the PSTT to deliver accredited train the trainer courses to PSTT fellows and across the Ogden network; this will ensure a primary science capital teaching approach can be applied appropriately, consistently and effectively in schools across England.

We will launch our new website to the meet high accessibility standards and will begin the process of updating our pdf resources to ensure they are more easily accessible.

We will work to raise our profile on twitter and in education media so we can contribute more fully to national conversations on physics education and share our expertise and research results more widely.

Governance, structure and management

Constitution

The charity is governed by a trust deed dated 25 March 1994 and is registered with the Charity Commission, Charity Registration Number 1037570.

On 18 May 1998 the Trustees executed a supplementary deed to widen their powers of investment, so that they can enter into contracts, borrow against loans, insure and convert into money all or any part of the Trust Fund, including accepting further funds upon specified conditions. The charitable objects allow the Trustees to give grants for general charitable purposes.

There were no changes to the Trustee board this year.

Appointment of Trustees

The Trustees are appointed by the existing Trustees. At any one time, there must be a minimum of three Trustees.

Induction and training of Trustees

When new Trustees are appointed there are procedures in place to ensure that they clearly understand their duties and responsibilities and are able to assess their own training needs. The majority of Trustees are long-standing and are able to support the development of new members of the Board.

The Trustees are briefed bi-annually by the Chief Executive about their responsibilities and liabilities as Trustees.

Organisational structure and decision making

The Trustees are ultimately responsible for the policies, activities and assets of the charity. They meet four times a year to review the developments with regard to the Charity and its grant giving activities and to make any important decisions. When necessary, the Trustees seek advice and support from the charity's professional advisers, including investment managers and accountants. Expert advisers in physics education may also be consulted where appropriate.

The day-to-day management of the charity's activities, and the implementation of policies, is delegated to Clare Harvey, Chief Executive, in line with an agreed scheme of delegation. At their meetings, the Trustees will review the investment performance, strategic changes to programmes, the impact of programme activities and any grant proposals for other charitable purposes.

Diversity and inclusion

The Ogden Trust aims to increase participation in physics for under-represented groups and diversity and inclusion is therefore important to the organisation. This is considered across our staff, consultants and grantees. We are currently undergoing a change process, consisting of ongoing training and reflection to address any systemic barriers in our programmes and events. Ongoing care and increased awareness and understanding will help us to mitigate barriers to inclusion.

Financial summary

Key financial performance indicators

The total expenditure of the charity in 2020/21 was £2,336,219, decreased from £2,846,238 in 2019/20. School partnerships are the biggest area of spend for the Trust, with nearly half (45%) of expenditure going towards the programme. In general, the Trust gives a number of smaller grants (ie less than £5,000), with significant support for grantees through local regional representatives and the central team. We often convene our grantees to share practice, locally and nationally. Support and governance costs are (relatively) higher this year as the change to our financial year means they cover a period of 17-months, while COVID impact has reduced programme expenditure across the same period.

The investment gain in this period has brought the portfolio back to pre-COVID levels, in line with investment objectives. However, the Trustees are always aware that there are external factors which could affect the achievements of their objectives as all of the Charity's assets are made up of investments and cash, the result of which are dependent on the general performance of the UK and overseas stock markets. In order to minimise this risk, the Trustees set prudent investment policies and place reliance on the investment managers to monitor and advise on necessary investment changes and suitable asset allocation.

Expenditure by programme
April 2020–August 2021

- School Partnerships
- Teacher Network
- Ogden outreach officers
- Teach Physics internships
- Alumni programme
- Grants, bursaries & scholarships
- Other physics activities
- Other charitable purposes

Expenditure by type
April 2020–August 2021

- Direct costs
- Grant funding of activities
- Support & governance costs

Investment policy and performance

There are no restrictions on the charity's power to invest. The investment strategy is set by the Trustees and takes into account income requirements, the risk profile and the investment manager's view of the market prospects in the medium term. The overall investment policy is to maximise total return with a target of 5%. This year has seen a significant gain on investments as the stock market recovers after the low of March 2020 when the COVID impact was hardest. This gain has brought the value of the investments back to pre-COVID levels.

Reserves policy

As explained above, the charity carries out a range of activities, some of which comprise projects requiring significant ongoing financial commitment and investment. The Trustees have examined the requirements for free reserves, ie, those unrestricted funds not designated for specific purposes or otherwise committed. As the majority of the investments are liquid, the majority of the Trust's funds are free reserves.

The Trustees' policy is to manage financial resources in such a way as to provide in full for the grant and bursary commitments made, and to ensure similar levels of commitment in the future. The free reserves must therefore be sufficient to generate sufficient return to allow this to happen. In the current financial climate, the Trustees estimate this amount to be £50,000,000–£70,000,000.

The balance sheet shows free reserves (unrestricted funds less tangible fixed assets) of £59,477,847 (2020: £40,685,831). The significant unrealised losses from the economic downturn due to COVID-19 have been mitigated; free reserves are back in target range and recovery of investment returns is being closely monitored.

Risk management

In line with the requirement for Trustees to undertake a risk assessment exercise and report on the same in their annual report, the Trustees have looked at the risks The Ogden Trust currently faces and have reviewed the measures in place, or needing to be put in place, to deal with them. The Trustees have identified seven main areas where risks may occur, and a comprehensive risk register has been produced.

Having assessed the major risks to which the charity is exposed, in particular those relating to its investments and its finances, the Trustees believe that by monitoring reserve levels, ensuring controls exist over key financial systems, and by examining the grant management processes carried out by the charity they have established effective systems to mitigate those risks.

The COVID-19 virus caused significant changes to the programmes during the year and risk to staff and participants was considered at the forefront of all planning. The office has been closed for the majority of the period, with occasional visits. Most programmes could be adapted to online, or take place in other ways, although the internship programmes were cancelled altogether in 2020.

It is expected that the impact of COVID on the business of the Trust will decrease over the next year, but it continues to be considered in all risk assessments and contingency plans remain in place for all activities.

Risk	Mitigation
Poor investment returns	These are monitored in quarterly Trustees' meetings and if poor returns are expected grant making can be reduced or halted.
Grant holders behaving in an inappropriate fashion	Grant holders are in contact with the Trust throughout the duration of their grant and such behaviour can be addressed when required.
Grant holders misspending funds	Grant holders are required to account for their spending in their reporting and misspent funds can be reclaimed.
Safeguarding	The Trust has a safeguarding children policy as well as staff behaviour policies. All staff have undertaken child protection and safeguarding training.
COVID affecting staff	Staff have worked at home through the majority of the year. The office is well spaced, ventilated and regularly cleaned.
COVID affecting programmes	Events will be held in line with government guidance and will take part online where appropriate. Venues will be liaised with closely to minimise financial loss. Other programmes will be adapted to reduce risk.
Data protection	The Trust has a data protection policy and a retention and disposal policy. The Chief Executive is the Data Protection Officer. All staff have had training on data protection.

Trustees' responsibility statement

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

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity 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 judgments and accounting estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation;
- 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.

The Trustees are responsible for keeping proper accounting records that are sufficient to show and explain the charity's transactions and disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

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

This report was approved by the Trustees, on 4 February 2022 and signed on their behalf by:

Cameron Ogden

Independent auditor's report to the Trustees of The Ogden Trust

Opinion

We have audited the financial statements of The Ogden Trust (the 'charity') for the period ended 31 August 2021 which comprise the statement of financial activities, balance sheet, statement of cash flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- Give a true and fair view of the state of the charity's affairs as at 31 August 2021 and of its incoming resources and application of resources, for the period then ended
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice
- Have been prepared in accordance with the requirements of the Charities Act 2011

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on The Ogden Trust's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The other information comprises the information included in the trustees' annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. Our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the course of the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 requires us to report to you if, in our opinion:

- The information given in the trustees' annual report is inconsistent in any material respect with the financial statements;
- Sufficient accounting records have not been kept; or
- The financial statements are not in agreement with the accounting records and returns; or
- We have not received all the information and explanations we require for our audit

Responsibilities of Trustees

As explained more fully in the statement of trustees' responsibilities set out in the trustees' annual report, the trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charity or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

We have been appointed as auditor under section 144/145 of the Charities Act 2011 and report in accordance with regulations made under section 154 of that Act.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud are set out below.

Capability of the audit in detecting irregularities

In identifying and assessing risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, our procedures included the following:

- We enquired of management which included obtaining and reviewing supporting documentation, concerning the charity's policies and procedures relating to:
  - Identifying, evaluating, and complying with laws and regulations and whether they

were aware of any instances of non-compliance;
  - Detecting and responding to the risks of fraud and whether they have knowledge of any actual, suspected, or alleged fraud;
  - The internal controls established to mitigate risks related to fraud or non-compliance with laws and regulations.
- We inspected the minutes of meetings of those charged with governance.
- We obtained an understanding of the legal and regulatory framework that the charity operates in, focusing on those laws and regulations that had a material effect on the financial statements or that had a fundamental effect on the operations of the charity from our professional and sector experience.
- We communicated applicable laws and regulations throughout the audit team and remained alert to any indications of non-compliance throughout the audit.
- We reviewed any reports made to regulators.
- We reviewed the financial statement disclosures and tested these to supporting documentation to assess compliance with applicable laws and regulations.
- We performed analytical procedures to identify any unusual or unexpected relationships that may indicate risks of material misstatement due to fraud.
- In addressing the risk of fraud through management override of controls, we tested the appropriateness of journal entries and other adjustments, assessed whether the judgements made in making accounting estimates are indicative of a potential bias and tested significant transactions that are unusual or those outside the normal course of business.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the charity's trustees as a body, in accordance with section 144 of the Charities Act 2011 and regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the charity's trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and the charity's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Date: 25 February 2022

Sayer Vincent LLP, Statutory Auditor
Invicta House, 108-114 Golden Lane, LONDON, EC1Y 0TL

Sayer Vincent LLP is eligible to act as auditor in terms of section 1212 of the Companies Act 2006

Statement of financial activities for the period ended 31 August 2021

	Note	Unrestricted funds 2021 £	Restricted funds 2021 £	Total funds 2021 £	Total funds 2020 £
Income from:					
Donations	2	1,239	3,900	5,139	19,503
Investments	3	370,667	-	370,667	304,896
Other income	4	127,522	-	127,522	-
Total income		**499,428**	**3,900**	**503,328**	**324,399**
Expenditure on:					
Raising funds	5	379,030	-	379,030	408,460
Charitable activities	6	1,953,289	3,900	1,957,189	2,437,778
Total expenditure		**2,332,319**	**3,900**	**2,336,219**	**2,846,238**
Net expenditure before investment gains		**(1,832,891)**	-	**(1,832,891)**	**(2,521,839)**
Net gains/(losses) on investments	13	20,627,155	-	20,627,155	(14,100,163)
Net (expenditure)/ income and net movement in funds		**18,794,264**	-	**18,794,264**	**(16,622,002)**
Reconciliation of funds:					
Total funds brought forward		40,685,831	-	40,685,831	57,307,833
Total funds carried forward	20	59,480,095	-	59,480,095	40,685,831

The notes on pages 36 to 61 form part of these financial statements.

Balance sheet

	Note	31 August 2021 £	31 March 2020 £
Fixed assets			
Tangible assets	12	2,248	4,671
Investments	13	60,232,572	42,377,917
Total fixed assets		**60,234,820**	**42,382,588**
Current assets			
Debtors	14	105,916	98,357
Cash at bank and in hand		127,869	142,524
		233,785	**240,881**
Creditors: amounts falling due within one year	15	(824,039)	(1,081,703)
Net current liabilities		**(590,254)**	**(840,822)**
Total assets less current liabilities		**59,644,566**	**41,541,766**
Creditors: amounts falling due after more than **one year**	16	(164,471)	(855,935)
Net assets		**59,480,095**	**40,685,831**
Charity funds			
Unrestricted funds	20	**59,480,095**	40,685,831
Total funds		**59,480,095**	40,685,831

The notes on pages 36 to 61 form part of these financial statements.

The financial statements were approved by the Trustees on 4 February 2022 and signed on their behalf, by:

.....
Cameron Ogden
Trustee

Statement of cash flows for the period ended 31 August 2021

	Note	2021 £	2020 £
Cash flows from operating activities			
Net cash used in operating activities	17	**(1,780,232)**	**(2,952,597)**
Cash flows from investing activities			
Dividends, interests and rents from investments		370,667	304,896
Purchase of property, plant and equipment		(1,757)	-
Proceeds from sale of investments		1,396,667	11,738,226
Purchase of investments		-	(9,362,688)
Net cash provided by investing activities		**1,765,577**	**2,680,434**
Change in cash and cash equivalents in the year		**(14,655)**	**(272,163)**
Cash and cash equivalents at the beginning of the year		142,524	414,687
Cash and cash equivalents at the end of the year		**127,869**	**142,524**

The notes on pages 36 to 61 form part of these financial statements.

Notes to the financial statements for the period ended 31 August 2021

1. Accounting policies

1.1 Change of year end

In line with the authority provided by the Trust deed, during 2020-21, the accounting year end was extended to 31 August 2021. The current year accounts are prepared for a 17-month period with comparatives for a 12-month period, hence comparatives are not directly comparable. This change allows the charity to align it's financial reporting with it's impact reporting as the majority of grants are awarded for the academic year.

1.2 Basis of proparation of financial statements

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant notes to these accounts. The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (second edition – October 2019) – (Charities SORP (FRS 102)) the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The financial statements have been prepared to give a 'true and fair' view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a 'true and fair view'. This departure has involved following Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 rather than the Accounting and Reporting by Charities: Statement of Recommended Practice from 1 April 2005 which has since been withdrawn.

No significant estimates or judgements have been made by management in preparing these financial statements.

The Ogden Trust constitutes a public benefit entity as defined by FRS 102.

1.3 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the company for particular purposes. The costs of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

1.4 Going concern

The Trustees have reviewed the financial position of the charity and have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Although COVID has had an impact on the investments in the prior year, the reserves are now back at the intended level and there are sufficient funds to cover the strategic plans for the next five years with no need to reduce expenditure at any point. Accordingly, the financial statements continue to be prepared on the going concern basis.

1.5 Income

All income is recognised once the charity has entitlement to the income, it is probable that the income will be received and the amount of income receivable can be measured reliably.

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity; this is normally upon notification of the interest paid or payable by the Bank.

Dividends are recognised once the dividend has been declared and notification has been received of the dividend due.

Income tax recoverable in relation to investment income is recognised at the time the investment income is receivable.

Donation income is recognised when received.

Other income is recognised in the period in which it is receivable and to the extent the goods have been provided or on completion of the service.

1.6 Expenditure

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

Support costs, including governance costs are those costs incurred directly in support of expenditure on the objects of the charity and include management carried out at the principal office. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements. Support and governance costs have been allocated to activities based on staff time spent.

Grants payable are charged in the year when the offer is made except in those cases where the offer is conditional, such grants being recognised as expenditure when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the period end are noted as a commitment, but not accrued as expenditure.

Expenditure on raising funds represents the fees paid to investment managers in connection with the management of the Charity's listed investments.

All resources expended are inclusive of irrecoverable VAT.

1.7 Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

1.8 Tangible fixed assets and depreciation

Tangible fixed assets are carried at cost, net of depreciation and any provision for impairment. Depreciation is provided at rates calculated to write off the cost of fixed assets, less their estimated residual value, over their expected useful lives on the following bases:

Fixtures & fittings	20% per annum based on cost
Computer equipment	25% per annum based on cost

1.9 Investments

Fixed asset investments are a form of financial instrument and are initially recognised at their transaction cost and subsequently measured at fair value at the Balance Sheet date, unless fair value cannot be measured reliably in which case it is measured at cost less impairment.

All gains and losses are taken to the Statement of Financial Activities as they arise. Realised gains and losses on investments are calculated as the difference between sales proceeds and their opening carrying value or their purchase value if acquired subsequent to the first day of the financial year. Unrealised gains and losses are calculated as the difference between the fair value at the year end and their carrying value.

Investment gains and losses, whether realised or unrealised, are combined and shown in the heading 'Gains/(losses) on investments' in the Statement of Financial Activities.

1.10 Foreign currencies

Monetary assets and liabilities denominated in foreign currencies are translated into sterling at rates of exchange ruling at the balance sheet date.

Transactions in foreign currencies are translated into sterling at the relevant monthly average exchange rate.

Exchange gains and losses are recognised in the Statement of Financial Activities.

Foreign exchange gains and losses arising on investments are disclosed within gains/(losses) on revaluations of fixed assets on the Statement of Financial Activities.

1.11 Debtors

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

1.12 Cash at bank and in hand

Cash at bank and 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.

1.13 Creditors and provisions

Liabilities are recognised when there is an obligation at the Balance Sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably. Liabilities are recognised at the amount that the charity anticipates it will pay to settle the debt or the amount it has received as advanced payments for the goods or services it must provide. Provisions are measured at the best estimate of the amounts required to settle the obligation. Where the effect of the time value of money is material, the provision is based on the present value of those amounts, discounted at the pre tax discount rate that reflects the risks specific to the liability. The unwinding of the discount is recognised within interest payable and similar charges.

1.14 Pensions

The charity operates a defined contribution pension scheme, and the pension charge represents the amounts payable by the charity to the fund in respect of the year.

1.15 Critical accounting estimates and areas of judgement

Preparation of the financial statements requires management to make significant judgements and estimates. The key areas in the financial statements where these judgements and estimates have been made are as follows:

- depreciation on fixed assets;
- fair value of investments, and;
- grants accrued payable in more than one year.

2. Income from donations

	Unrestricted funds 2021 £	Restricted funds 2021 £	Total funds 2021 £	Total funds 2020 £
Donations	1,239	3,900	**5,139**	19,503

In 2020, £220 was unrestricted and £19,283 was restricted.

3. Investment income

	Unrestricted funds 2021 £	Restricted funds 2021 £	Total funds 2021 £	Total funds 2020 £
Income from listed investments	366,792	-	366,792	291,921
Interest on bank fixed deposits	3,875	-	3,875	12,975
	370,667	-	**370,667**	**304,896**

In 2020 all investment income was unrestricted.

4. Other income

	Unrestricted funds 2021 £	Restricted funds 2021 £	Total funds 2021 £	Total funds 2020 £
Madoff Victims Fund Compensation	127,522	-	127,522	-

5. Investment management costs

	Unrestricted funds 2021 £	Total funds 2021 £	Total funds 2020 £
Investment manager's fees	557,710	557,710	579,299
Investment management fee rebate	(178,860)	(178,860)	(170,839)
	379,030	**379,030**	**408,460**

The rebate was negotiated by the trustees and is equivalent to a third of their 1.5% management fee charged to the Omnia Fund L.P. for dealing with the Fund's affairs.

In 2020 all expenditure on investment management costs was unrestricted.

6. Analysis of expenditure

6a. Analysis of expenditure: current year

	Direct costs 2021 £	Grant funding of activities (note 7) 2021 £	Support & governance costs (note 9) 2021 £	Total 2021 £	Total 2020 £
School Partnerships	278,121	280,520	488,597	1,047,238	1,021,007
Teacher Network	44,605	67,404	69,789	181,798	104,822
Ogden Outreach Officers	84,922	(38,396)	58,144	104,670	497,735
Teach Physics internships	5,088	97,130	46,501	148,719	92,615
Alumni programme	-	25,200	11,644	36,844	105,935
Grants	437	167,756	34,932	203,125	196,712
Bursaries and scholarships (note 8)	-	(11,250)	11,644	394	(5,172)
Other physics activities	85,983	52,548	23,288	161,819	183,801
Physics education activities	**499,156**	**640,912**	**744,539**	**1,884,607**	**2,197,455**
Other charitable purposes	-	61,014	11,568	72,582	240,323
All charitable activities	**499,156**	**701,926**	**756,107**	**1,957,189**	**2,437,778**
2020	560,048	1,348,550	529,180	2,437,778	

In 2020, charitable activities expenditure amounting to £19,283 was restricted.

The support and governance costs have been allocated to direct and grant making activities based on staff time spent. Total support costs allocated to grant activities is £362,078.

6b. Analysis of expenditure: prior year

	Direct costs 2020 £	Grant funding of activities (note 6) 2020 £	Support & governance costs (note 8) 2020 £	Total 2020 £	Total 2019 £
School Partnerships	452,510	255,805	312,692	1,021,007	913,089
Teacher Fellowships	14,534	66,210	24,078	104,822	175,287
Ogden Outreach Officers	52,657	396,977	48,101	497,735	331,580
Teach Physics internships	3,748	64,789	24,078	92,615	115,631
Alumni programme	99	81,758	24,078	105,935	219,414
Grants	7,421	153,201	36,090	196,712	267,833
Bursaries and scholarships (note 7)	-	(29,250)	24,078	(5,172)	244,682
Other physics activities	29,079	130,644	24,078	183,801	200,797
Physics education activities	**560,048**	**1,120,134**	**517,273**	**2,197,455**	**2,468,313**
Other charitable purposes	-	228,416	11,907	240,323	561,376
All charitable activities	**560,048**	**1,348,550**	**529,180**	**2,437,778**	**3,029,689**
2019	436,023	1,988,166	605,500	3,029,689	

7. Grants payable

	2021 £	2020 £
Grants to institutions:		
Primary schools	182,116	170,209
Secondary schools	275,681	178,453
Universities	(14,453)	502,818
Organisations	91,854	281,639
Subtotal	**535,198**	**1,133,119**
Grants to individuals	166,728	215,431
Total	**701,926**	**1,348,550**

327 grants were awarded in 2021, in addition to 1 scholarship, compared to 360 grants and no scholarships in 2020.

Grants payable to Institutions, net of write backs are as follows:

	2021 £	2020 £
Primary schools		
Ashton Gate Primary	2,500	2,500
Avonmore Primary School	(2,000)	11,500
Beacon Ace Academy	5,500	-
Beaumont Primary School/Gaskell Primary School	-	(833)
Beechview Academy	5,000	5,500
Bevington Primary School	2,500	2,500
Bignold Primary School	1,620	2,100
Broadlea Primary School	(1,225)	11,500
Camelsdale Primary School	1,005	-
Cherry Fields Primary School	2,500	-
Churchdown Village Junior School	70	2,500
Copley Primary School	5,500	-
Cordwalles Junior School	-	1,000
Daven Primary School	-	1,000
Dulverton Junior School	-	1,000
Durham Gilesgate Primary School	2,500	-
Fairford Primary School	-	1,000
Ferndale Primary and Nursery School	2,500	-
Gayton Primary School	2,500	5,500
Gisburn Primary School	-	1,000
Great Abington Primary School	-	2,140
Greenway Primary School	-	1,000
Gurnard Primary School	10,500	2,500
Hartside Primary Academy	2,340	4,750
Hertford St Andrew Primary School	40	1,000
Hillcroft Primary School	-	(250)
Hillmorton Primary School	-	2,400
Hopwood Community Primary School	-	1,000
John Donne Primary School	2,160	-
King Edward VI Five Ways School	-	(2,500)
Kings Ash Academy	5,500	-

	2021 £	2020 £
Primary schools (continued)		
Kingsland CofE Primary School	384	2,500
Kippax North Primary School	(1,274)	5,000
Ledbury Primary School	1,000	5,000
Loughborough Primary School	2,500	-
Lunt's Heath Primary School	5,000	5,750
Milnrow Parish CE Primary School	-	1,000
Moorpark Junior School of The New Guild Trust	935	3,000
Muswell Hill Primary School	-	2,500
Newby Primary School	-	750
Newsham Primary School	5,000	6,000
Okehampton Primary School	5,000	5,500
Oundle Church of England Primary School	2,500	-
Our Lady & St Kenelm School	-	(1,531)
Our Lady of Mount Carmel	-	1,000
Our Lady of Walsingham Catholic Primary School	3,500	2,500
Our Lady's Bishop Eton Primary	-	2,500
Pikes Lane Primary School	-	1,000
Radford Primary Academy	-	2,500
Red Oak Primary School	5,500	-
Richard Taylor CE Primary School	5,500	-
Salfords Primary School	-	1,000
Sculthorpe Primary Academy	2,500	2,500
Sherford Vale School	730	-
Sibsey Free Primary School	5,250	5,500
Silver Springs Primary Academy	9,495	-
Somerleyton Primary School	1,000	2,200
Springbank Primary School	16,000	1,000
St Agnes CE Primary	2,500	-
St Alphege Junior school	250	9,333
St. Andrews & St. Marks CE Junior School	1,000	2,400
St Anne's RC Primary School	2,000	-
St Augustine's RC Primary School	1,000	2,500

	2021 £	2020 £
Primary schools (continued)		
St Bede's Inter-church School	-	700
St Clements Church of England Primary	5,000	-
St Maria Goretti Catholic Academy	3,760	10,300
St Matthew's Catholic Primary School	5,500	-
St Paul's CofE Primary School, Nuneaton	5,500	-
St Paul's CofE Primary School, Bolton	-	2,500
St Peter in Thanet	2,500	-
St Stephen Churchtown Academy	3,500	5,500
St Stephen's CofE Primary School	5,500	-
Stella Maris Catholic Primary School	2,500	-
Streatham Wells Primary School	5,500	-
Sutton-in- Craven CP School	5,500	-
Thaxted Primary School	-	3,500
The Coppice Primary School	-	(500)
Trinity Primary Academy	-	2,000
Walford Primary School	1,000	2,500
Westfield Nursery and Primary School	-	-
Westminster Primary Academy	2,500	-
Whitehouse Common Primary School	-	1,000
Whittington CE Primary School	(1,624)	9,000
Wickham Market Primary School	200	2,400
Wybourn Community Primary	5,500	-
Other	1,500	100
Total	**182,116**	**170,209**

	2021 £	2020 £
Secondary schools		
Abingdon School	-	2,000
Alder Community High School	1,833	-
Alexandra Park School	18,500	2,500
Altrincham College	-	900
ARK Burlington Danes	-	30
Ark Globe Academy	2,000	-
Ashton Community Science College	9,000	-
Avanti Fields School	3,500	-
Beamont Collegiate Academy	5,500	-
Beechen Cliff School	-	(800)
Belmont Community School	(500)	500
Benenden School	2,500	-
Berwick Academy	2,500	-
Bideford College	2,500	6,750
Blackpool Sixth Form College	2,500	5,500
Bonus Pastor Catholic College	5,500	-
Bridgwater College Academy	2,240	3,000
Brixham College	(2,000)	5,500
Brixton Learning Collaborative	2,460	-
Burnley College	1,205	-
Castle View Academy	5,500	-
Chelsea Academy	1,000	-
Chilton Academy	330	2,500
Consett Academy	70	4,800
Davidson CE High School for Girls	2,599	-
Didsbury High School	5,500	-
Earl Mortimer & Sixth Form Centre	(866)	3,500
East Coast College	-	-
East Norfolk Sixth Form College	(300)	2,000
Energy Coast UTC	2,500	2,250
Ernesford Grange Community Academy	750	-
Exeter Mathematics School	(2,000)	5,500

	2021 £	2020 £
Secondary schools (continued)		
Girls' Day School Trust	66,476	-
Great Academy Ashton	2,654	-
Haggerston School	-	8,450
Hartlepool Sixth Form College	540	1,500
Hartpury College	(2,168)	-
Helston Community College	8,000	-
Highbury Fields School	(1,000)	3,083
Hinckley Academy and John Cleveland Sixth Form Centre	(600)	-
Humberston Academy/Havelock Academy	5,500	-
Kensington Aldridge Academy	-	1,000
Kettering Buccleuch Academy	2,500	-
King Edward VI Grammar School – Louth	1,500	2,250
King Edward VII Academy	5,500	-
Kingsbridge Community College	9,250	1,000
Lampton Academy	800	2,700
Latymer Foundation at Hammersmith	-	30,000
Leeds Sixth Form College	2,000	-
Lightcliffe Academy	-	(3,585)
Limehurst Academy	4,000	-
London Design & Engineering UTC	2,519	-
Longsands Academy	5,500	-
Marden High School	885	-
Marine Academy Plymouth	3,142	-
Merchants' Academy	2,890	-
Mounts Bay Academy	2,000	-
New College Worcester	3,540	-
Newcastle-Under-Lyme College	-	4,000
North Cambridge Academy	1,000	3,250
North East Learning Trust	3,000	-
Northgate High School	-	3,750
Oldham Sixth Form College	-	1,000
Our Lady of Lourdes Catholic MAC	3,000	-

	2021 £	2020 £
Secondary schools (continued)		
Paget High School	(1,000)	3,500
Painsley Catholic Academy	1,838	-
Ponteland High School	-	4,500
Presdales School Academy Trust	2,925	-
Queen Elizabeth's School, Crediton	-	591
Reach South Multi Academy Trust	3,065	-
Roundhill Academy	-	2,000
Samuel Ward Academy	-	2,000
Seven Kings High School	-	(3,340)
Sharples School	2,540	3,500
Sidney Stringer Academy	-	7,500
Skegness Grammar School	1,901	3,500
South Bromsgrove High School	650	700
Southmoor Academy	250	2,500
Spires Academy	1,070	6,750
St Aidan's Church of England High School	5,500	-
St Augustine's Catholic High School	4,332	-
St Bede's Inter-church School	(700)	-
St Benedict's Catholic School	-	500
St Bernadette Catholic School	1,977	5,500
St Edward's Catholic Academy	5,500	-
St Gabriel's College	-	3,000
St Marylebone CE School	552	-
St Mary's College Academy	-	7,000
St Paul's Girls' School	-	1,000
St Richard's Catholic College	-	3,000
St Cuthbert's RC High School	5,000	-
Stewards Academy	2,500	3,000
Stockton Sixth Form College	(500)	3,500
Tapton School	8,000	-
The Academy at Shotton Hall	5,000	-
The Derby High School	-	1,000

	2021 £	2020 £
Secondary schools (continued)		
The Gatwick School	2,500	-
The Gilberd School	(850)	850
The Godolphin and Latymer School	(350)	1,850
The King's School	5,500	-
The Priory Learning Trust	2,500	-
The UCL Academy	(500)	500
The Whitby High School	5,500	-
The Whitstable School	2,500	-
The Winston Churchill School	-	2,000
Thomas Mills High School	1,520	2,400
Titus Salt School	(1,000)	1,000
Urmston Grammar	(2,100)	3,100
Wardle Academy	2,500	-
Whitley Academy	(950)	-
Workington Academy	-	500
Wyke Sixth Form College	-	750
Other	1,762	(526)
Total	**275,681**	**178,453**

	2021 £	2020 £
Universities		
Birmingham City University	-	(4,835)
Cardiff University	(4,169)	1,085
Durham University	(3,000)	1,072
Harvard Business School	(24,544)	20,334
Imperial College London	2,100	-
Keele University	(6,461)	(1,643)
Kings College London Student Union	-	(1,800)
Lancaster University	4,940	(4,650)
Newcastle University	3,700	60,000
Northumbria University	47	1,478
Queen Mary University of London	(29,335)	1,358
Royal Holloway University of London	-	8,096
Sheffield Hallam University	13,660	2,500
The Open University	(4,237)	5,519
University College London	(4,250)	77,803
University of Bath	(209)	61,500
University of Birmingham	1,305	-
University of Cambridge	-	(5,250)
University of Central Lancashire	-	61,928
University of Edinburgh	-	11,660
University of Hertfordshire	-	40,000
University of Kent	(4,310)	4,969
University of Leeds	-	1,731
University of Leicester	5,000	-
University of Lincoln	4,800	-
University of Liverpool	69	29,263
University of Manchester	18,500	4,500
University of Nottingham	(3,000)	6,805
University of Oxford	-	(9,000)
University of Sheffield	3,421	60,000
University of Southampton	-	2,157
University of St Andrews	2,000	60,000

	2021 £	2020 £
Universities (continued)		
University of Surrey	-	1,590
University of Sussex	-	(1,500)
University of Worcester	4,974	2,500
University of York	4,546	802
Warwick University	-	2,596
Other	-	250
Total	**(14,453)**	**502,818**

	2021 £	2020 £
Organisations		
1001 Inventions	4,950	-
A Level Physics Online	-	22,000
Aerospace Bristol	4,500	-
Astin Consulting	4,924	-
Blyth STEM Hub	5,000	-
Bright Box Makerspace	(8,600)	9,175
Cambridge Hands-on Science	-	-
Child Bereavement UK	1,250	-
Dorchester Town Council	-	850
EDT (Engineering Development Trust)	4,865	-
Harrow Club W10	-	900
HMDT Music	4,500	-
Inspire	-	13,255
Liberty Arts Yorkshire	5,000	-
Lightyear Foundation	5,660	9,980
Links to a Life	-	9,000
Mangorolla CIC	10,000	-
National Youth Agency	-	17,420
Physics Partners	5,000	(1,000)
Plymouth Science CIC	5,000	-
Robinson Education Solutions Ltd	3,000	-
Rochdale Borough Council	-	10,000
Royal Trinity Hospice	5,000	-
Scarabeus Aerial Theatre	5,000	-
Science Magic Shows (Matt Pritchard)	3,000	-
SHINE	-	150,000
Special Boat Service Association	15,000	-
St John's Ambulance Guernsey	-	10,000
Tall Ships Youth Trust	-	5,000
The Bristol Initiative Charitable Trust working with My Future My Choice	-	6,000
The ClementJames Centre	-	5,000
The IAI Physics Course	3,150	-

	2021 £	2020 £
Organisations (continued)		
The Smallpeice Trust	5,000	-
Turtle Key Arts	4,680	-
UK Electronics Skills Foundation (UKESF)	-	5,000
UK Students for the Exploration and Development of Space	(4,025)	4,025
Villiers Park Education Trust	-	(1,466)
Winchester Science Centre	-	6,500
Total	**91,854**	**281,639**
Grants to individuals	166,728	215,431
Total grants	**701,926**	**1,348,550**

A reconciliation of the grants payable and grant commitment figures (excluding scholarships and bursaries which are detailed in note 8) shown in these accounts is as follows:

	2021 £	2020 £
Grant commitments at 1 April 2020	1,725,401	1,791,887
Commitments made in the period net of grants released	713,176	1,377,800
Grants paid during the period	(1,600,863)	(1,444,286)
Total	**837,714**	**1,725,401**

Grant commitments at 31 August 2021 are payable as follows:

	2021 £	2020 £
Within one year (included with note 15)	673,243	912,216
After more than one year (included with note 16)	164,471	813,185
Total	**837,714**	**1,725,401**

8. Bursaries and scholarships

During the period ended 31 August 2021, the Trustees have committed the following bursaries to pupils of various secondary schools and scholarships to undergraduates of various universities for physical sciences courses:

	2021 £	2020 £
One (2020: nil) undergraduate scholarships started Autumn 2020	4,500	-
Movement in provision for prior year approved bursaries	-	3,000
Movement in provision for prior year approved scholarships	(15,750)	(32,250)
Total	**(11,250)**	**(29,250)**

No further undergraduate scholarships will be made (the scholarship that was awarded in this period was a deferral from earlier years), although existing scholarships continue to be paid. Adjustments are made annually based on changes to course length and early departure from eligible courses.

A reconciliation of the bursaries and scholarships payable and commitments figures shown in these accounts is as follows:

	2021 £	2020 £
Bursaries and scholarships commitments at 1 April 2020	159,000	348,750
Bursaries and scholarships movement (see above)	(11,250)	(29,250)
	147,750	319,500
Total bursaries and scholarships payable:		
Bursaries paid during the year	-	-
Scholarships paid during the year	(74,250)	(160,500)
Bursaries and scholarships commitments at 31 August 2021	**73,500**	**159,000**

Bursaries and scholarships commitments at 31 August 2021 are payable as follows:

	2021 £	2020 £
Within one year (included with note 15)	73,500	116,250
After more than one year (included with note 16)	-	42,750
Total	**73,500**	**159,000**

9. Support costs

	Total 2021 £	Total 2020 £
Staffing costs		
Wages, salaries and medical insurance	402,152	245,221
National insurance	32,658	23,310
Pension costs	21,729	13,949
Recruitment costs	2,150	1,125
Staff training and development	13,200	3,078
Consultancy costs	10,050	19,695
Subtotal	**481,939**	**306,378**
Office costs		
Office rental and costs	177,146	111,716
Printing, postage and stationery	5,561	6,561
Web and digital	46,213	24,299
Publications and promotional materials	140	511
Travel expenses	713	8,915
Depreciation & loss on disposal of assets	4,180	32,945
Payroll and other fees	1,252	957
Accountancy fees	35,783	26,693
Subtotal	**270,988**	**212,597**
Governance costs		
Audit fees	6,200	10,205
Subtotal	**6,200**	**10,205**
Total	**759,127**	**529,180**

The 2021 audit fee includes an over accrual of £2,620 which has been deducted from the 2021 audit fee of £8,820. The 2020 audit fee was £8,400; the figure in the accounts includes over accruals.

These costs have been apportioned to the charitable activities according to the amount of staff time spent on them.

10. Net expenditure

This is stated after charging:

	2021 £	2020 £
Depreciation of tangible fixed assets – owned by the charity	4,180	7,552
Auditor's remuneration – audit	8,820	10,205
Auditor's remuneration – non audit	-	-
Pension costs	21,729	13,949
Operating lease costs	135,181	76,943

11. Trustee remuneration and expenses and the cost of key management personnel

The average number of persons employed by the charity during the 17-month period was as follows:

	2021	2020
Charitable activities	8	7

The numbers of employees whose emoluments during the 17-month period fell within each band of £10,000 from £60,000 upwards were as follows (the 2020 comparator refers to a 12-month period):

	2021	2020
In the band £60,000 – £70,000	-	1
In the band £70,000 - £80,000	1	-
In the band £90,000 – £100,000	1	-

As at 31 August 2021, £597 was owed by the Trust in relation to the pension scheme (2020: £182).

No trustees received reimbursement of expenses or benefits in the year.

The key management personnel of the charity comprise the Trustees and Chief Executive. The Trustees all give their time and expertise without any kind of remuneration or other benefit in kind (2020: £Nil). The total employment benefits, including employers NI of key management personnel over the 17-month period was £112,400 (2020: £78,168).

12. Tangible fixed assets

	Computer equipment £	Total £
Cost		
At 1 April 2020	11,876	11,876
Additions	1,757	1,757
At 31 August 2021	**13,633**	**13,633**
Depreciation		
At 1 April 2020	7,205	7,205
Charge for the year	4,180	4,180
At 31 August 2021	**11,385**	**11,385**
Net book value		
At 31 August 2021	**2,248**	**2,248**
At 31 March 2020	4,671	4,671

13. Fixed asset investments

	Listed securities £	Cash held for investment purposes £	Total £
Market value			
At 1 April 2020	40,458,401	1,919,516	42,377,917
Additions	-	-	-
Disposals (proceeds £1,396,667, realised gain £192,740)	(1,203,927)	-	(1,203,927)
Other cash movements	-	(839,793)	(839,793)
Revaluations / currency gains	20,520,308	(85,893)	20,434,415
Investment management fees	(536,040)	-	(536,040)
At 31 August 2021	**59,238,742**	**993,830**	**60,232,572**
Historical cost	**10,563,783**	**993,830**	**11,557,613**

All the fixed asset investments are held in the UK.

All investments are carried at their fair value. Investment in equities and fixed interest securities are all traded in quoted public markets, primarily the London Stock Exchange. Holdings in common investment funds, unit trusts and open ended investment companies are at the bid price or the NAV of the fund. The basis of fair value for quoted investments is equivalent to the market value, using the bid price. Asset sales and purchases are recognised at the date of trade at cost (that is their transaction value).

The Charity manages the investment portfolio themselves and regularly consults with market professionals on its investment strategy. The Charity is operating an investment policy that provides for a degree of diversification of holdings within different unit trust investments. The sole purpose of the investment strategy is to fund the annual expenditure of the Trust. The Charity has invested in a number of unit trusts in order to protect the Charity's exposure to volatility in the market and seek low risk investments wherever possible. The Investment Strategy is designed to seek absolute returns on its investments and does not differentiate between income arising from Interest and dividends or capital growth on its investments in its funding decisions.

All funds have monthly liquidity and the Trust regularly liquidates part of its Fund investments at the monthly NAV value to meet the expenditure of the Trust. The Trust makes investments both in Sterling and US dollars and from time to time hedges its foreign currency exposure.

The Charity does not make use of derivatives and similar complex financial instruments as it takes the view that investments are held for their longer-term growth and annual income.

The Charity has no material investment holdings in markets subject to exchange controls or trading restrictions.

14. Debtors

	2021 £	2020 £
Amounts due in more than 1 year:		
Rent deposit	19,410	19,410
Amounts due in less than 1 year:		
Trade debtors	126	10,381
Rebate of external management fees	10,712	9,365
Other debtors	32,628	20,050
Prepayments and accrued income	43,040	39,151
Total	**105,916**	**98,357**

15. Creditors: amounts falling due within one year

	2021 £	2020 £
Trade creditors	12,928	15,782
Other taxation and social security	15,981	6,147
Grants payable (note 7)	673,243	912,216
Bursaries and scholarships payable (note 8)	73,500	116,250
Other creditors	899	5,450
Accruals	47,488	25,858
Total	**824,039**	**1,081,703**

16. Creditors: amounts falling due after more than one year

	2021 £	2020 £
Grants payable (note 7)	164,471	813,185
Bursaries and scholarships payable (note 8)	-	42,750
Total	**164,471**	**855,935**

17. Reconciliation of cash

Reconciliation of net movement in funds to net cash flow from operating activities

	2021 £	2020 £
Net income/(expenditure) for the year (as per Statement of Financial Activities)	18,794,264	(16,622,002)
Adjustments for		
(Gains)/losses on investments	(19,251,322)	14,247,073
Dividends and interest from investments	(370,667)	(304,896)
Depreciation	4,180	7,552
Loss on disposal of fixed assets	-	25,392
Increase in debtors	(7,559)	(1,704)
Decrease in creditors	(949,128)	(304,012)
Net cash used in operating activities	**(1,780,232)**	**(2,952,597)**

18. Analysis of cash and cash equivalents

	2021 £	2020 £
Cash in hand	127,869	142,524
Total cash and cash equivalents	**127,869**	**142,524**

19. Analysis of changes in net debt

	At 1 April 2020 £	Cash flows £	At 31 August 2021 £
Cash at bank and in hand	142,524	(14,655)	127,869

20. Statement of funds

Statement of funds: current year

	Balance at 1 April 2020 £	Income £	Expenditure £	Gains/ (Losses) £	Transfers £	Balance at 31 August 2021 £
General funds						
General funds	40,685,831	499,428	(2,332,319)	20,627,155	-	59,480,095
Total unrestricted funds	**40,685,831**	**499,428**	**(2,332,319)**	**20,627,155**	**-**	**59,480,095**
Restricted funds						
Energy Internships	-	2,900	(2,900)	-	-	-
Isle of Wight Primary Science	-	1,000	(1,000)	-	-	-
Total restricted funds	-	**3,900**	**(3,900)**	-	-	-
Total funds	**40,685,831**	**503,328**	**(2,336,219)**	**20,627,155**	**-**	**59,480,095**

Statement of funds: prior year

	Balance at 1 April 2019 £	Income £	Expenditure £	Gains/ (Losses) £	Transfers £	Balance at 31 March 2020 £
General funds						
General fund	57,307,833	305,116	(2,826,955)	(14,100,163)	-	40,685,831
Restricted funds						
Energy Internships	-	19,283	(19,283)	-	-	-
Total funds	**57,307,833**	**324,399**	**(2,846,238)**	**(14,100,163)**	**-**	**40,685,831**

Purpose of funds

Energy Internships – The Energy Internships restricted fund is for donations towards the cost of the internships programme from host industries. The funding will be spent on student's bursaries.

Isle of Wight Primary Science – this fund is for donations which may only be spent to support primary science activities on the Isle of Wight.

21. Related party transactions

During the period, no grants were made to related parties. (In 2020, grants totalling £150,000 were paid to Shine: Support and Help in Education, of which Cameron Ogden is a trustee.)

22. Operating lease commitments

At 31 August 2021, the total of the charity's future minimum lease payments under non-cancellable operating leases was:

Land and buildings

	2021 £	2020 £
Amounts payable		
Within 1 year	77,640	77,640
Between 1 and 5 years	12,940	122,930
Total	**90,580**	**200,570**

Reference and administrative details of the charity

Trustees
Cameron Ogden (Chair)
Sir Peter Ogden
Lady Ogden
Tiffany Chawner
Edward Ogden
Tim Simmons

Charity registered number
1037570

Principal office
The Phoenix Brewery
13 Bramley Road
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W10 6SP

Accountants
Peters Elworthy & Moore
Salisbury House
Station Road
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CB1 2LA

Independent auditors
Sayer Vincent
Invicta House
108-114 Golden Lane
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Bankers
Lloyds Bank plc
University of Cambridge
3 Sidney Street Cambridge
CB2 3HX

Coutts & Co
440 Strand
London
WC2R 0QS

Investment managers
Credit Suisse (UK) Limited
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Chief Executive
Clare Harvey
The Ogden Trust
The Phoenix Brewery
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