

UNIVERSIFY EDUCATION

England & Wales · Charity number 1167240

Details

Status	Registered
Legal form	Charitable company
Company number	10114061
Registered	2016-05-20
Register	View on the Charity Commission register

Contact

Address	18 Beaumont Street Oxford OX1 2NA
Phone	01865264183
Email	info@universifyeducation.com
Website	www.universifyeducation.com

Activities

Objects: TO ADVANCE EQUALITY OF OPPORTUNITY IN EDUCATION IN THE UK AS THE TRUSTEES SEE FIT.

Activities: Universify Education's charitable purpose is to address educational inequality. The charity undertakes a year-long intervention for Year 10-11 students from non-selective state schools to increase access to highly selective universities. The intervention includes: A week-long residential summer programme, Monthly one-to-one coaching, online and A 3-day residential Easter revision programme.

Classification

- **How:** Provides Advocacy/advice/information
- **What:** Education/training
- **Who:** Children/young People

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-04-30	£445,995	£443,114	-	-
2024-04-30	£347,710	£347,649	-	-
2023-04-30	£453,028	£415,158	-	-
2022-04-30	£263,103	£231,735	-	-
2021-04-30	£116,495	£114,827	-	-

Trustees

Name	Role	Appointed
HARRY Hortyn	Chair	2016-04-09
Dr Steve Rayner		2017-08-18
James Gregory		2022-06-17
MARY NICHOLSON		2018-06-22
Marco Logiudice		2022-06-17
Margot Queenie Sprague-Davies		2024-03-01
Matthew Lacey		2017-08-18
Steven Barrie Smith		2023-12-07

UNIVERSIFY EDUCATION

England & Wales - Charity number 1167240

Accounts

Charity number: 1167240
Company Registration number: 10114061 (England & Wales)



Trustees' Report and Unaudited Accounts
For the Year Ended 30 April 2025

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University Education reference and administrative details

Trustees during the year ended 30 April 2025 and up to the date of this report

Ms Mary Nicholson (Chair)

Mr Harry Hortyn

Dr Steve Rayner

Mr Matt Lacey

Mr James Gregory

Miss Helen Norman (resigned 6th June 2025)

Mr Marco Logiudice

Mr Steven Smith

Ms Amy Ellis-Thompson (retired by rotation 6th June 2025)

Miss Margot Sprague-Davies

Company Number: 10114061 (England and Wales)

Charity Registration Number: 1167240

Registration Office: 18 Beaumont Street, Oxford OX1 2NA

Bankers: Lloyds, 25 Gresham Street, London EC2V 7HN; HSBC, 65 Cornmarket Street, Oxford OX1 3HY

Independent Examiner: Thomas Bradley ACMA

Trustees' report incorporating the trustees' report

1. Introduction

This report was prepared on behalf of the trustees in accordance with FRS102 SORP Accounting and Reporting by Charities guidelines.

This report should be read in conjunction with the latest impact report which is published on www.universifyeducation.com/impact.

2. Objectives and activities

Objectives and aims

Universify Education's charitable purpose, as set out in the governing document, is to provide equality of opportunity in education in the UK as the trustees see fit.

The charity's vision is to support young people to realise their potential, regardless of background.

Universify Education aims to fulfil this vision and create a fairer by supporting young people from low-socioeconomic and underrepresented backgrounds to fulfil their potential through education. Young people from underrepresented backgrounds face systemic barriers which limit their ability to access transformative personal development and further educational opportunities, including Higher Education. This perpetuates a cycle of underrepresentation both in Higher Education and in society more broadly, as important leadership, professional and decision-making roles in society are generally taken by graduates. Underrepresentation in Higher Education therefore limits individuals' social mobility and reinforces existing inequalities.

Universify's programme overcomes three major barriers faced by participants:

1. Limited aspirations
2. Limited academic attainment
3. Feeling out of place in a university setting

Universify Education's core programme aims to overcome these barriers by achieving the following outcomes:

1. Broadening and increasing aspirations
2. Increased attainment at GCSE
3. Increased understanding of university and belief that university is for 'people like me'.

The main activities of the charity

The charity undertakes a selection of programmes to support young people from underrepresented backgrounds.

A) National programme

The core programme is a year-long programme for Year 10 students (aged 14-16) from non-selective state schools.

1. **A week-long residential summer programme at partner universities** for participants to experience undergraduate student life, attending academic subject taster sessions and university admissions talks, and participating in social activities. They are supported by current or recent undergraduates who help participants feel 'at home' at university and challenge preconceptions that university is not for 'people like me'.
2. **Monthly one-to-one coaching** - unlike mentoring, coaching does not focus on giving advice. Instead, coaches guide students through the process of reflecting on what they want to achieve and creating a plan to reach their aspirations. This helps students to explore their unique strengths and interests to gain the confidence and problem-solving skills to commit to their chosen path both during and beyond the Universify programme. Coaching also provides a space for students to set and work towards academic goals to boost GCSE attainment.
3. **A 3-day Spring revision residential** - participants return in Year 11 to revise core subjects for their upcoming GCSEs. Here, participants also look beyond Universify to access a pipeline of ongoing support for students, whether they choose to pursue university or other education and employment options. After completing the spring residential, online coaching continues until participants receive their GCSE results.

B) Alumni programmes

Universify participants continue to be supported beyond the end of the programme via newsletters containing further programme opportunities, university applications advice, and scholarships, internships and work experience.

In 2023-24, the charity launched Alumni+, a two-year pilot programme designed for young people who had already completed the core year-long programme and had decided they wanted to study at highly-selective universities, but recognised they would benefit from additional support to realise this ambition. The programme consists of subject-specific masterclasses hosted by university partners, UCAS application and transition to university sessions, group coaching to develop academic skills and confidence, and an in-person university Open Day visit.

C) Universify Communities: Bristol programme ('Step Ahead')

2024-25 saw the design of a new programme to meet the need to cater to more intersectional groups. The Universify Communities: Bristol Programme ("Step Ahead") will run in partnership with Future Quest and the University of the West of England to provide opportunities for those who have been supported by social services, including experience of social care.

Delivering the Universify programmes

Universify's programmes are delivered in collaboration with a range of partners. The residentials and coaching are delivered primarily by volunteers who are recruited and trained by Universify staff. They undergo Enhanced DBS checks and two reference checks, and extensive safeguarding and coaching training. Seminars are delivered by experienced university tutors and revision classes taught by current GCSE tutors with a strong knowledge of the syllabus.

The charity works closely with other institutions to deliver its activities. Universify works with secondary schools across the country who send participants on the programme. It partners with colleges at the Universities of Oxford, working with their link regions and holding the residentials at these colleges. In 2024-25 the charity partnered with Jesus College, Somerville College, and Trinity College at the University of Oxford for its core Year 10-11 programme and for its supplementary Year 12-13 Alumni+ programme.

Ensuring the charity's work delivers its aims

The charity measures its impact annually, through a range of participant surveys, teacher surveys, coach observation surveys, and statistical comparisons with benchmarks constructed by UCAS. Impact data and reports are independently evaluated annually. In addition, expertise in impact evaluation and reporting is represented on Universify's board of trustees.

To ensure the charity's work continues to best meet the needs of its beneficiaries, it recruits a student council of Universify alumni. One member of the council acts as a student representative, attending board meetings. The student council and representatives are consulted on the charity's strategy and programme plans to ensure the Universify programme continues to be directed by the charity's beneficiaries.

How the charity's activities deliver public benefit

The activities undertaken further the charity's purposes for the public benefit, increasing individuals' social mobility by equipping young people with the skills, knowledge, and belief to realise their potential regardless of their background. As a result, these young people are able to access life changing education, employment and training opportunities, including university.

The trustees have had regard to the Charity Commission's guidance on public benefit.

3. Achievements and performance

The charity supported 216 participants during the year 2024-25. It delivered its primary Year 10-11 programme to a cohort of 111 participants across three colleges, and a further 58 attended their earlier Year 10 residential for the 2025-26 programme. It hosted 30 students on its second cohort of the Alumni+ programme, and continued supporting 17 from the first cohort, who completed their two-year programme in Spring 2025.

A full summary of the charity's ongoing impact and achievements can be found in its latest impact report - <https://www.universifyeducation.com/impact>.

How the charity performed against its objectives

The charity's long-term strategic objectives are as follows:

1. Achieve a strong delivery record that is demonstrated by robust impact measurement
2. Financial sustainability and income diversification
3. Expand the programme by forging new partnerships with universities

In 2024-25, Universify continued to deliver positive impact via its existing programmes. The charity was able to make progress on expanding its charitable activities. This has been achieved through a new partnership with the University of the West of England and Future Quest to pilot a new programme, 'Universify Communities', tailored towards those who have accessed social services and have experience of social care.

The financial review shows the charity's success in securing greater support from trusts and foundations. In particular, the charity has received donations from foundations, including Garfield Weston, to support its core costs alongside project costs. This has enabled the charity to develop its new Universify Communities programme alongside delivering its existing programmes.

Financial review

The direct resource costs of Universify's programmes are summarised in the charity's accounts which have been prepared in accordance with the provisions applicable to small companies limited by guarantee regime and FRS102 SORP Accounting and Reporting by Charities.

- £233,163.23 of income related to donations from charitable trusts and foundations, corporate partners, public fundraising, private individuals, and interest income.
- £212,832.00 worth of benefits in kind were received in the form of donated office space and services from Oxford Summer Courses Limited and office space from True Capital Limited, and accommodation, meals and classrooms donated by partner University colleges who host the Universify residentials. The benefits were calculated by conforming to the market value at the time of use.
- There was a small surplus generated in this year of £2,881.34, reflecting the charity running well to budget.

In the accounting period May 2024 to April 2025 income came from fundraising activity including private donations, corporate donations and partnerships, successful applications to trusts and foundations and public fundraising.

Reserves policy and amount of reserves held

At the end of Universify Education's ninth year of operations, the charity has £98,105.26 in reserves. The charity seeks to maintain a minimum level of reserves approximately equal to three months' operating costs, built up after considering future costs that are committed to delivering the year-long programme. At 30 April 2025 this was set at £60,000, so the charity had surplus reserves of £38,105.26 at that date. Trustees review Universify's surplus and minimum reserves position at quarterly board meetings and consider the best use of surplus reserves based on fundraising success, the fundraising landscape and the charity's long-term strategic objectives.

Despite the ongoing challenging fundraising landscape in 2024-25, Universify has reached the targeted level of reserves. With the securing of £95,373.57 of income for 2025-26, the trustees are confident of the charity's ability to continue as a going concern for the next 12 months.

There are no funds or subsidiary undertakings that are materially in deficit.

Principal sources of funds

The principal funding sources for the charity are through fundraising income from trusts and foundations, public fundraising, private donors, corporate partnerships, and university partnerships.

For 2024-25, the Charity received £97,250.00 in trust and foundation grants. These included two core cost grants from Swire Charitable Trust and Garfield Weston Foundation, and regional grants to fund participant places in Bristol, London, Stoke and the West Midlands. The charity raised £99,697.77 from corporate partnerships, including income from the second year of the charity's partnership with True Global Ltd. As part of the charity's work to increase the sustainability of the programme, the charity received £30,250.00 in part funding from partner colleges. In addition, the charity raised a small amount from public fundraising via its annual Christmas campaign.

For 2025-26, the charity has secured £95,373.57 of income for the next financial year through trusts and foundation grants and public donations towards the 2025-26 programme, and through renewed college partnerships. The funding for the charity's corporate partnership with True Global Ltd was not renewed for its intended third year.

4. Structure, governance, and management

Universify Education is a company limited by guarantee incorporated on 9th April 2016 and registered as a charity on 20th May 2016.

The company was established under a Memorandum of Association which outlined the objects and powers of the charitable company and is governed under its Articles of Association.

Recruitment and appointment of trustees

The Trustees who served during the period and up to the date of this report are set out on page 3.

The charity uses an annual trustee skills audit to assess whether the board has the appropriate mix of skills.

When recruiting new trustees, the board aims to find individuals who can support the charity's growth and bring in additional resources, expertise, lived experience and connections to help Universify achieve its goals.

To ensure a fair and nondiscriminatory recruitment process Universify Education followed the UK Employment legislations and Charity Commission's CC30 trustee recruitment guidance. No other person or external body is entitled to appoint charity trustees.

Organisational structure

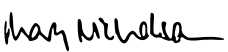
The role of the Board is to provide oversight of the charity's activities, including planning, approval of annual budgets and review of the charity's strategy, results, and achievements. The Board also provides general support to the staff. The day-to-day running of the charity is carried out by the staff team, with support from volunteers. During each year, the board meets for quarterly board meetings and an annual strategy day, with ad-hoc meetings and/or discussion between trustees as needed.

Current trustees' areas of focus

Trustee	Date appointed	Focus area
Harry Hortyn	May-16	<ul style="list-style-type: none"> • Supports charity strategy, provides links to key stakeholders in Oxford through experience in accredited academic short courses as co-founder of Oxford Summer Courses Limited and 5 years in social investment • Previous chair of the board
Matt Lacey	May-17	<ul style="list-style-type: none"> • Supports profile-building and brings experience as CEO of surveying company and a background in acting and media
Dr Steve Rayner	Aug-17	<ul style="list-style-type: none"> • Brings experience of university admissions, tuition, and governance and provides advice on programme development and approaches to universities
Mary Nicholson	Jun-18	<ul style="list-style-type: none"> • Brings experience of risk and financial management from background in risk and sustainability in the finance and banking sector • Current Chair of the board
Helen Norman	Mar-22 (resigned Jun-25)	<ul style="list-style-type: none"> • Brings recent lived experience, experience working in the sector and teacher insight to school engagement and programme design
James Gregory	Jun-22	<ul style="list-style-type: none"> • Brings safeguarding experience and provides teacher insight to school and student recruitment and programme design
Marco Loguidice	Jun-22	<ul style="list-style-type: none"> • Brings recent lived experience of the education system, experience as a former University volunteer, and fundraising and strategic experience for small social enterprises
Steven Smith	Dec-23	<ul style="list-style-type: none"> • Brings experience in law and governance, with a background as in-house legal counsel in financial services
Amy Ellis-Thompson	Dec-23 (retired by rotation Jun-25)	<ul style="list-style-type: none"> • Brings experience working within the sector and of impact reporting to robustly collect and report on impact
Margot Sprague-Davies	Mar-24	<ul style="list-style-type: none"> • Brings fundraising experience, offering insight and guidance on University's fundraising strategy

To ensure the charity continues to best meet the needs of its beneficiaries University Education appoints a Student Representative who is a member of the student council and a recent University alumnus. The Student Representative attends trustee board meetings but does not hold legal responsibility for the charity in the same way as the other trustees.

The report of the trustees was approved by the trustees on 14th January 2026 and signed on their behalf by:

Signature: 

Print name: Mary Nicholson

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF UNIVERSIFY EDUCATION

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 ("the Charities Act") and that an independent examination is needed

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention

Basis of independent examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no material matters have come to my attention which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

Signed: *T. Bradley*

Date: *15th January 2026*

Name: Thomas Bradley ACMA

Relevant professional body if any: CIMA

Address: 16, Rue Adam Roberti, Luxembourg-Merl, L-2429, Luxembourg

Statement of Financial Activities
For the period 1 May 2024 to 30 April 2025

	Note	Unrestricted fund	Restricted fund	Total funds 2025	Prior period Total funds 2024
Donations					
Donations	3	£ 121,522	£ 93,826	£ 215,348	£ 170,718
Interest income		£ 2,615		£ 2,615	£ 219
Income from charitable activities	4		£ 15,200	£ 15,200	£ 14,500
Total donations		£ 124,137	£ 109,026	£ 233,163	£ 185,438
Benefits in kind received	5	£ 27,400	£ 185,432	£ 212,832	£ 162,272
Total income		£ 151,537	£ 294,458	£ 445,995	£ 347,710
Expenditure on:					
Charitable activities	6	(£ 148,656)	(£ 294,458)	(£ 443,114)	(£ 347,649)
Total expenditure		(£ 148,656)	(£ 294,458)	(£ 443,114)	(£ 347,649)
Net income/(expenditure)		£ 2,881	£ -	£ 2,881	£ 61
Transfer between funds		-	-	-	-
Net movement in funds		£ 2,881	£ -	£ 2,881	£ 61
Reconciliation of funds					
Total funds brought forward		£ 95,224		£ 95,224	£ 95,163
Net movement in funds	13	£ 2,881		£ 2,881	£ 61
Total funds carried forward		£ 98,105	£ -	£ 98,105	£ 95,224

Universify Education
Balance Sheet
As at 30 April 2025

	Note	Apr-25	Apr-24
Fixed Assets			
Tangible assets	10	£ 748	£ 1,496
Current Assets			
Prepayments		£ 353	£ 285
Cash at Bank and in Hand	11	£ 136,348	£ 166,109
		£ 136,701	£ 166,394
Creditors: Amounts Falling Due within one Year	12	(£ 39,344)	(£ 72,667)
Net Current Assets (Liabilities)		£ 97,357	£ 93,728
Total assets less current liabilities		£ 98,105	£ 95,224
Total Net Assets		£ 98,105	£ 95,224
Charity Funds			
Restricted funds		-	-
Unrestricted funds	13	£ 98,105	£ 95,224
Total Funds of the Charity		£ 98,105	£ 95,224

Within this financial period there are no new fixed assets, all income during this accounting period was in the form of donations, donated facilities and services.

The company was entitled to exemption from audit under s477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to small companies subject to the small companies regime and in accordance with FRS102 SORP.

Approved by the directors and authorised for issue on 14 January 2026.

Signed by Mary Nicholson on behalf of all the trustees/directors

Print Name: Mary Nicholson Date: 14 January 2026

Universify Education

Notes to the Financial Statements

For the period ended 30th April 2025

1) General Information

Universify Education is a company limited by guarantee and registered as a charity in England and Wales with the Charity Commission under charity number 1167240.

The charity was established to provide equality of opportunity in education in the UK as the trustees see fit

These financial statements cover the period from 1st May 2025 to 30th April 2025.

2) Accounting Policies

The financial statements have been prepared in accordance with:

- The Charities Statement of Recommended Practice (SORP) FRS 102 applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102),
- The Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102),
- The Charities Act 2011.

Universify Education meets the definition of a public benefit entity under FRS 102.

The financial statements are prepared under the historical cost convention and in sterling (£), which is the functional currency of the charity.

a) Income

Income is recognised in the Statement of Financial Activities (SoFA) when the charity is entitled to the income, receipt is probable, and the amount can be measured reliably. This includes donations, grants, and other forms of voluntary income.

b) Expenditure

Expenditure is recognised on an accruals basis when a legal or constructive obligation exists, it is probable that settlement will be required, and the amount can be measured reliably.

Charitable expenditure comprises costs incurred directly in the delivery of the charity's activities and support costs. Governance costs include those associated with the strategic management of the charity and compliance with statutory requirements.

c) Fund Accounting

Unrestricted funds are available to spend on activities that further any of the purposes of the charity.

Restricted funds are donations or grants received where the donor has specified a particular purpose for the income to be used.

d) Debtors and Creditors

Debtors are recognised at settlement amount due. Creditors are recognised where the charity has a present obligation resulting from a past event that will probably require settlement, and the amount can be reliably estimated.

e) Cash Flow Statement

The charity has taken advantage of the exemption available under FRS 102 from preparing a Statement of Cash Flows, as it qualifies as a small charity.

f) Fixed asset investments

Investments are measured at fair value. Changes in fair value are recognised in the statement of financial activities. Where fair value cannot be reliably measured, cost less impairment is used.

g) Going concern

The financial statements are prepared on a going concern basis. The trustees have assessed the charity's financial position and consider it able to continue its activities for the foreseeable future.

3) Donations

2024-25	Unrestricted	Restricted	Total	2023-24	Unrestricted	Restricted	Total
True Capital Ltd	£ 50,000		£50,000	True Capital Ltd	£ 50,000		£50,000
Bridgemark Education Ltd	£ 30,672		£30,672	Bridgemark Education Ltd	£ 30,000		£30,000
Garfield Weston Foundation	£ 20,000		£20,000	Somerville College, Oxford		£ 13,000	£13,000
The Swire Charitable Trust	£ 15,000		£15,000	The Nisbet Trust		£ 10,000	£10,000
The Nisbet Trust		£ 16,750	£16,750	Jesus College, Oxford		£ 10,000	£10,000
Royal National Children's SpringBoard Foundation		£ 15,000	£15,000	The Lemford Foundation		£ 10,000	£10,000
The Co-Op Academy Trust		£ 13,500	£13,500	Walcot Foundation		£ 8,400	£8,400
Somerville College, Oxford		£ 13,000	£13,000	Trinity College, Oxford		£ 7,250	£7,250
Jesus College, Oxford		£ 10,000	£10,000	Worshipful Company of Carmen Benevolent Trust		£ 5,500	£5,500
Trinity College, Oxford		£ 7,250	£7,250				
Worshipful Company of Carmen Benevolent Trust		£ 5,500	£5,500				
Royal National Children's SpringBoard Foundation		£ 5,000	£5,000				
Other donations and gifts (under £5,000)	£ 5,850	£ 7,826	£13,676	Other donations and gifts (under £5,000)	£ 17,228	£ 9,340	£26,568
Total donations	£ 121,522	£ 93,826	£ 215,348	Total donations	£ 97,228	£ 73,490	£170,718

4) Other revenue

This refers to income generated providing support to partners to deliver activities contributing to our shared missions, for example recruiting students from underrepresented backgrounds for a STEM day.

5) Benefits in kind

These are services and facilities provided for free by partner university colleges: accommodation, meals, and classroom space. Other benefits in kind include office space and staff time donated by Oxford Summer Courses and True Global Ltd.

Item	2024-25		2023-24	
	Unrestricted	Restricted	Unrestricted	Restricted
College Accommodation		£128,792		£93,160
College Meals		£42,840		£30,912
Teaching space		£13,800		£10,800
True office space	£12,000		£12,000	
Oxford Summer Courses office space	£12,000		£12,000	
Oxford Summer Courses staff time donation scheme*	£3,400		£3,400	
Total benefits in kind	£27,400	£185,432	£27,400	£134,872

*Staff time donation scheme involves Oxford Summer Courses matching volunteer time by with time at work up to a day a month.

6) Charitable expenditure

	Unrestricted	Restricted	Total 2024-2025	Unrestricted	Restricted	Total 2023-2024
Programme costs		£ 19,992	£ 19,992		£ 13,723	£ 13,723
College accommodation and meals		£ 185,432	£ 185,432		£ 134,872	£ 134,872
Employee costs	£ 117,448	£ 69,003	£ 186,450	£ 111,866	£ 51,655	£ 163,521
Other benefits in kind	£ 27,400		£ 27,400	£ 27,400		£ 27,400
Other expenditure	£ 3,808	£ 20,031	£ 23,839	£ 22	£ 8,112	£ 8,134
Total Charitable expenditure	£ 148,656	£ 294,458	£ 443,114	£ 139,287	£ 208,362	£ 347,649

Increased expenditure

Overall charitable expenditure increased by £95,465, driven by:

- a) An increase in college accommodation and meals costs in 2024-25 from £134,872 to £185,432 due to one of the summer programmes being brought forward by 4 months, falling in 2024-25 rather than 2025-26.
- b) An increase in salaries due to the increased headcount to 6 FTE from August 2024 and following a salary benchmarking review.
- c) £14,785 spend on fundraising consultants to cover long-term staff illness and to increase fundraising capacity.

7) Employee and trustee remuneration

None of the Trustees received any emoluments or expenses for the provision of trustee services in the reporting financial year.

No employees received benefits of over £60,000 during the period.

8) Staff numbers

There was an average of 6 full-time members of staff employed during the period. In the previous period, there was an average of 5.8 full-time members of staff employed.

9) Related Party Transactions

There were no related party transactions during the year.

10) Computer equipment*

Assets at 30th April 2025	Computer equipment	
Cost at 1st May 2024	£	2,992
Additions	£	-
Disposals	£	-
At 30th April 2025	£	2,992
Depreciation		
At 1st May 2024	(£	1,496)
Charge for the year	(£	748)
Disposals	£	-
At 30th April 2025	(£	2,244)
Net book amount at 30th April 2025	£	748
Net book amount at 30th April 2024	£	1,496

*Computer equipment depreciation policy is straight line over four years

11) Cash at Bank and in hand

Expenses account	£	371
Cash at bank	£	135,977
Total Cash at Bank and in hand	£	136,348

12) Creditors

Deferred income	£	37,374
Operations Payable	£	1,970
Total Creditors	£	39,344

Deferred income includes funding for 2025-26 programme cycle.

13) Statement of funds

	Balance at 30 Apr 2024	Income	Expenditure	Balance at 30 Apr 2025
Unrestricted Fund	£ 95,224	£ 445,995	£ 443,114	£ 98,105

In accordance with our reserves policy of the total funds carried forward on 30th April 2025 (£98,105.26) we have £38,105.26 of surplus reserves. Our surplus reserves are any reserves additional to our minimum reserves amount of 3 months operating costs, which is £60,000. Trustees review University's surplus and minimum reserves position at quarterly board meetings and consider the best use of surplus reserves based on fundraising success and strategic objectives.

UNIVERSIFY EDUCATION

England & Wales - Charity number 1167240

Accounts

Charity number: 1167240
Company Registration number: 10114061 (England & Wales)



**Trustees' Report and Unaudited Accounts
For the Year Ended 30 April 2024**

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Universify Education reference and administrative details

Trustees during the year ended 30 April 2024 and up to the date of this report

Ms Mary Nicholson (Chair)

Mr Harry Hortyn

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Miss Helen Norman

Mr Marco Logiudice

Mr Steven Smith (appointed 7 December 2023)

Ms Amy Ellis-Thompson (appointed 7 December 2023)

Miss Margot Sprague-Davies (appointed 1 March 2024)

Company Number: 10114061 (England and Wales)

Charity Registration Number: 1167240

Registration Office: 18 Beaumont Street, Oxford OX1 2NA

Bankers: Lloyds, 25 Gresham Street, London EC2V 7HN; HSBC, 65 Cornmarket Street, Oxford OX1 3HY

Independent Examiner: Thomas Bradley ACMA

Trustees' report incorporating the trustees' report

1. Introduction

This report should be read in conjunction with the latest impact report which is published on www.universifyeducation.com/impact. The Impact Report details the impact that Universify Education has achieved and the methodology behind how this impact is measured.

This report was prepared on behalf of the trustees in accordance with FRS102 SORP Accounting and Reporting by Charities guidelines.

2. Objectives and activities

Objectives and aims

Universify Education's charitable purpose, as set out in the governing document, is to provide equality of opportunity in education in the UK as the trustees see fit.

The charity's vision is to support young people to realise their potential, regardless of background.

Universify Education aims to fulfil this vision and create a fairer society through social mobility by supporting young people from low-socioeconomic and underrepresented backgrounds to fulfil their potential through education, regardless of their background. Too often, a young person's background limits their aspirations, GCSE grades and understanding of university (often believing it is not for people 'like me') which impacts whether they are able to make and pursue an informed decision about their future, including whether to apply and go to university. This in turn limits their ability to access transformative personal development and further educational opportunities and perpetuates a cycle of underrepresentation both in Higher Education and in society more broadly, as important leadership, professional and decision-making roles in society are generally taken by graduates. Underrepresentation in Higher Education therefore limits social mobility and reinforces existing inequalities.

With the input of sector leaders, the charity designed the Universify programme to overcome three major barriers faced by participants from low socio-economic and underrepresented backgrounds to gaining the skills, knowledge and belief to fulfil their potential through education, including successfully applying to highly-selective universities. These barriers are:

1. Limited aspirations
2. Limited academic attainment
3. Feeling out of place in a university setting

The Universify Education programme aims to overcome these barriers by achieving the following outcomes:

1. Broadening and increasing aspirations
2. Increased attainment at GCSE
3. Increased understanding of university and university admissions

By achieving these aims Universify seeks to provide its beneficiaries with the skills, knowledge and belief to make and fulfil a more informed decision about their futures allowing them to thrive regardless of their background.

The main activities of the charity

The charity undertakes a year-long programme for Year 10 students (aged 14-16) from non-selective state schools. The intervention comprises three elements to equip young people with the skills, knowledge and belief to realise their potential.

1. **A week-long residential summer programme at partner universities** – the residential programme provides an authentic undergraduate student experience to enable participants to feel at home in a university setting and able to make a more informed decision about their future in education. Participants attend academic classes covering a broad curriculum of subjects to improve subject knowledge and critical thinking, providing an insight into the depth and level of undergraduate study. Sessions on university admissions and university life improve participants' understanding of universities, their environment, and the admissions process. Participants complete a group work project, building on the university admissions session by designing a university, encouraging participants to consider what they are looking for from university and what it offers. Additionally, participants take part in social activities to help them feel 'at home' at university, to challenge preconceptions, and to form supportive friendships with like-minded students to boost participant aspirations and attainment, as they support each other in a community which they may struggle to find back at school.

2. **Monthly one-to-one coaching** - Coaching empowers students to be self-directed learners. Students are paired with a coach, usually a current/recent undergraduate, with shared interests. Unlike mentors, a coach does not focus on giving advice. Instead, they guide students through the process of reflecting on what they want to achieve and creating a plan to reach their aspirations. This helps students to explore their unique strengths and interests to gain the confidence and problem-solving skills to commit to their chosen path both during and beyond the Universify programme. In the short-term coaching also provides a space for students to set and work towards academic goals to boost their GCSE attainment as the foundation for pursuing future opportunities.

3. **A 3-day Spring revision residential** - participants return to host partner universities during the spring of Year 11 to revise core subjects for their upcoming GCSEs, gaining the tools to attain the best grades. Here, participants also look beyond Universify to access a pipeline of ongoing support for students, engaging with further programmes, such as the Sutton Trust Summer School, Multiverse, and UNIQ. Students also complete an employability workshop to improve knowledge of the opportunities and options offered by a degree. After completing the spring residential, remote coaching continues until participants receive their GCSE results.

Following the completion of the year-long programme Universify participants become Universify alumni, receiving a monthly newsletter to share participants' stories post-Universify and highlight further opportunities on other programmes and career, internship and work experience programmes. This has led to many alumni joining Year 12 programmes such as In2Science, the Social Mobility Foundation programme, and the Sutton Trust Summer school as well as becoming members of the Fair Education Alliance Youth Steering Group and receiving life changing scholarships and employment opportunities.

Delivering the Universify programme

A Universify Head Office team prepares the courses, trains, and supports volunteer and tutor delivery teams, and oversees safeguarding, with three Designated Safeguarding Leads, of which two are also trained Mental Health First Aiders. The programme and

coaching are delivered by volunteers, who are all recent or current university students from across the UK. Course Directors, experienced in running residential, oversee the courses and all volunteers are trained in coaching, health and safety, and safeguarding. Volunteers undergo enhanced DBS checks and two reference checks, are trained by University staff in the charity's policies and procedures, and attend regular course catchups to receive support and guidance with remote coaching. The University safeguarding team is also contactable outside of formal catchups to support volunteers with any concerns. Seminars are delivered by experienced university tutors and revision classes taught by current GCSE tutors with a strong knowledge of the syllabus. All classes have a volunteer present to support in the delivery of the classes.

The charity works closely with other institutions to deliver its activities. University works with secondary schools across the country who send participants on the programme. It partners with colleges at the Universities of Oxford and Cambridge, working with their link regions and holding the residential at these colleges. In 2023-24 the charity partnered with Jesus College, Somerville College, and Trinity College at the University of Oxford for its primary Year 10-11 programme and with St John's College at the University of Cambridge for its Year 12-13 Alumni+ programme.

Ensuring the charity's work delivers its aims

The charity measures its impact annually, through pre- and post-course surveys to gather participant feedback, teacher surveys, coach observation surveys, and statistical comparisons with benchmarks constructed by UCAS. Impact data and reports are independently evaluated annually. In addition, expertise in impact evaluation and reporting is represented on University's board of trustees. University's impact measurement methodology, which was designed by specialists in impact measurement, is reviewed annually to ensure it remains in line with best practices and is fit for purpose.

The findings of the impact report measure how successfully the charity is providing participants with the skills, knowledge, and belief to realise their potential. These are measured against the charity's three desired short-term outcomes: raising aspirations, academic attainment, and understanding of university and university admissions and the charity's long-term mission of improving social mobility and overcoming underrepresentation at university by increasing the likelihood of making a successful application to university. These findings are used to refine the University programme to

make sure activities are as effective as possible in achieving the charity's objectives. In addition, feedback is gathered from Universify participants, volunteers, and staff as part of an annual programme review contributing to the development and implementation of an annual improvement plan.

To ensure the charity's work continues to best meet the needs of its beneficiaries, it recruits a student council of Universify alumni. One member of the council acts as a student representative, attending board meetings. The student council and representatives work with Universify and alumni and are consulted on the charity's strategy and programme plans to ensure the Universify programme continues to be directed by the charity's beneficiaries.

How the charity's activities deliver public benefit

The activities undertaken further the charity's purposes for the public benefit increasing social mobility by equipping young people with the skills, knowledge, and belief to realise their potential regardless of their background. As a result, these young people are able to access life changing education, employment and training opportunities, such as university.

The trustees have had regard to the Charity Commission's guidance on public benefit.

3. Achievements and performance

The charity supported 151 participants during the year 2023-24. It delivered its primary Year 10-11 programme to a reduced cohort of 120 participants, after two university college partnerships were completed after 3 and 5 years of collaboration. In 2023-24, the charity expanded its work by piloting an alumni programme, Alumni+, to 31 participants. This programme increased the depth of support provided to its participants by committing to two further years of tailored support for those considering applying to Oxford and Cambridge. The charity evaluated the impact of the programme on its fourth cohort who completed the Universify Education Year 10-11 programme in June 2020.

A full summary of the charity's ongoing impact and achievements can be found in its latest impact report - <https://www.universifyeducation.com/impact>.

How the charity performed against its objectives

For 2023-24 the charity continued to work towards the following long-term objectives:

1. Achieving a strong delivery record that is demonstrated by robust impact measurement
2. Financial sustainability and income diversification
3. Expand the programme by forging new partnerships with universities

To move towards these objectives the charity outlined the following short-term goals:

1. Continue to deliver the programme successfully and refine the model to meet the changing needs of partners while communicating key impact data effectively
2. Develop an alumni programme to provide ongoing support beyond Year 11
3. Diversify fundraising across income streams to enable financial resilience and future growth
4. Raise Universify's profile through concerted publicity campaigns and new content.

In 2023-24, Universify continued to deliver positive impact while the accounts, included in this report, show that the charity has continued to work within its financial constraints.

The financial review also shows the efforts made to increase the charity's donor base, reaching new regional funders as well as strengthening relationships with existing corporate funders. This has been an important marker of progress in a year where the funding landscape has moved on from ad hoc emergency funds relating both to the Covid-19 pandemic and the Cost of Living crisis. This has enabled the charity to continue building financial sustainability with a view to scale the programme again in future years.

Financial review

The direct resource costs of the Summer and Spring programmes are summarised in the charity's accounts which have been prepared in accordance with the provisions applicable to small companies limited by guarantee regime and FRS102 SORP Accounting and Reporting by Charities.

- £185,218.62 of income related to donations from charitable trusts and foundations, corporate partners, public fundraising, and private individuals.
- £162,272.00 worth of benefits in kind were received in the form of donated office space and services from Oxford Summer Courses Limited and office space from True Capital Limited, and accommodation, meals and classrooms donated by

partner University colleges who host the Universify residentials. The benefits were calculated by conforming to the market value at the time of use.

- There was a small surplus generated in this year of £60.57, reflecting the charity running well to budget.

In the accounting period May 2023 to April 2024 income came from fundraising activity including private donations, corporate donations and partnerships, successful applications to trusts and foundations and public fundraising.

Reserves policy and amount of reserves held

Universify Education's aim is to generate and maintain minimum reserves equal to 3 months' running costs through fundraising activity. These minimum reserves are built up after considering future costs that are committed to delivering the year-long programme. At the end of Universify Education's eighth year of operations, the charity has £95,223.92 in reserves. The charity seeks to maintain a minimum level of reserves approximately equal to three months' operating costs. At 30 April 2024 this was set at £55,000, so the charity had surplus reserves of £40,223.92 at that date. Trustees review Universify's surplus and minimum reserves position at quarterly board meetings and consider the best use of surplus reserves based on fundraising success, the fundraising landscape and the charity's long-term strategic objectives.

Despite the challenging fundraising landscape in 2023-24 resulting from the Cost of Living crisis, Universify has reached the targeted level of reserves. With the securing of £69,250.00 of income for 2024-25, the trustees are confident of the charity's ability to continue as a going concern for the next 12 months.

There are no funds or subsidiary undertakings that are materially in deficit.

Principal sources of funds

The principal funding sources for the charity are through fundraising income from trusts and foundations, public fundraising, private donors, corporate partnerships, and university partnerships.

For 2023-24, the Charity received £40,740.00 in trust and foundation grants. These included regional grants to fund participant places in Bristol, London, Stoke and the West Midlands. The charity raised £94,500.23 from corporate partnerships, including income

from the first and second years of the charity's partnership with True. As part of the charity's work to increase the sustainability of the programme, the charity received £30,250.00 in part-funding from partner colleges. In addition, the charity continued to maintain consistency in public fundraising income via an annual Christmas campaign and a successful 91 mile challenge campaign.

For 2024-25, the charity has secured £69,250.00 of income for the next financial year through trusts and foundation grants towards the 2023-24 programme, and through renewed college and corporate partnerships.

Plans for future periods

While the charity's fundraising capabilities have increased due in part to the team's growing expertise and the additional fundraising expertise on the board of trustees, the financial review of 2023-24 highlights an increasingly harsh fundraising landscape, shaped by the Cost of Living Crisis. Fundraising will remain a priority to diversify the charity's income to ensure ongoing sustainability. The demand and need for Universify's work has remained consistently high since the Covid-19 pandemic and the charity's latest impact report, focusing on university destinations, has demonstrated the programme's long-term efficacy. Therefore, the other major focus for the charity in the upcoming year will be to continue building networks with new university partners to expand the existing programme.

Within Oxford and Cambridge, this means increasing the support for the charity's beneficiaries beyond the Year 10-11 programme to meet the changing needs of its partners. The charity's pilot Alumni+ programme combines the expertise of its existing partners to support the charity's alumni through Year 12-13 with the aim of enhancing the programme's long-term impact on university access. The charity also aims to increase its partnerships beyond the Universities of Oxford and Cambridge to ensure sustainability and scale. Through reviewing the programme model, the charity aims to retain its programme's impact while ensuring the model is scalable across more universities. As part of refining the programme, the charity will explore partner programmes to address the needs of more specialised groups, such as those with personal characteristics including care experience, or specific subject interests. This approach will continue one of the charity's foundational aims of addressing gaps in provision within the sector to increase its overall effectiveness.

The charity recognises that expansion requires the resources to do so and programme growth will always be considered by trustees in line with financial constraints, ongoing fundraising work, and the awareness of the increasing demand for the charity's work.

4. Structure, governance, and management

Universify Education is a company limited by guarantee incorporated on 9th April 2016 and registered as a charity on 20th May 2016.

The company was established under a Memorandum of Association which outlined the objects and powers of the charitable company and is governed under its Articles of Association.

Recruitment and appointment of trustees

The Trustees who served during the period and up to the date of this report are set out on page 3.

The charity uses an annual trustee skills audit to assess whether the board has the appropriate mix of skills. Gaps may be met with training, third party expertise or new trustee recruitment. When recruiting new trustees, the board aims to find individuals who can support the charity's growth and bring in additional resources, expertise, lived experience and connections to help Universify achieve its goals.

The board sought to address the increasingly challenging fundraising landscape by increasing the board's fundraising expertise to ensure the future sustainability of the charity. This was achieved, with Margot Sprague-Davies joining the board in March.

To ensure a fair and nondiscriminatory recruitment process Universify Education followed the UK Employment legislations and Charity Commission's CC30 trustee recruitment guidance. No other person or external body is entitled to appoint charity trustees.

Organisational structure

The role of the Board is to provide oversight of the charity's activities, including planning, approval of annual budgets and review of the charity's strategy, results, and achievements. The Board also provides general support to the staff. The day-to-day running of the charity is carried out by the staff team, with support from volunteers. During each year, the board meets for quarterly board meetings and an annual strategy day, with ad-hoc meetings and/or discussion between trustees as needed.

Risk management

The Trustees have conducted a review of the major risks to which the charity is exposed. A risk register has been established and is reviewed at quarterly board meetings. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces. Identified risks are minimised by the implementation of procedures for safeguarding staff, volunteers, and participants. These procedures are reviewed annually to ensure that they continue to meet the needs of the charity. The charity is supported in the development of its policies and procedures by Oxford Summer Courses Limited, whose policies and procedures have been accredited by the British Accreditation Council.

Current trustees' areas of focus

Trustee	Date appointed	Focus area
Harry Hortyn	May-16	<ul style="list-style-type: none">• Brings experience of running accredited academic short courses as co-founder of Oxford Summer Courses Limited and 5 years in social investment• Supports charity strategy, provides links to key stakeholders in Oxford and oversees sign-off of Oxford Summer Courses' contributions.• Previous chair of the board
Matt Lacey	May-17	<ul style="list-style-type: none">• Brings experience as CEO of surveying company and a background in acting and media• Profile-building through press coverage, speaking platforms
Dr Steve Rayner	Aug-17	<ul style="list-style-type: none">• Brings experience of university admissions, tuition, and governance• Providing advice on programme development and approaches to colleges or universities, and partnership with Somerville college
Mary Nicholson	Jun-18	<ul style="list-style-type: none">• Brings experience of risk and financial management from background in risk and sustainability in the finance and banking sector• Current Chair of the board
Helen Norman	Mar-22	<ul style="list-style-type: none">• Brings recent lived experience of the education system and challenges faced by beneficiaries to fulfil their potential in education• Brings experience working in the sector and teacher insight to school engagement and programme design
James Gregory	Jun-22	<ul style="list-style-type: none">• Brings safeguarding experience• Providing teacher insight to school and student recruitment and programme design
Marco Loguidice	Jun-22	<ul style="list-style-type: none">• Brings recent lived experience of the education system, experience as a former Universify volunteer

		and experience of the challenges faced by beneficiaries to fulfil their potential in education <ul style="list-style-type: none"> • Brings fundraising and strategic experience
Steven Smith	Dec-23	<ul style="list-style-type: none"> • Brings experience in law and governance, with a background as in-house legal counsel in financial services
Amy Ellis-Thompson	Dec-23	<ul style="list-style-type: none"> • Brings experience working within the sector and of impact reporting to help Universify continue to robustly collect and report on its impact
Margot Sprague-Davies	Mar-24	<ul style="list-style-type: none"> • Brings fundraising experience, offering insight and guidance on Universify's fundraising strategy

To ensure the charity continues to best meet the needs of its beneficiaries Universify Education appoints a Student Representative who is a member of the student council and a recent Universify alumnus. The Student Representative attends trustee board meetings but does not hold legal responsibility for the charity in the same way as the other trustees.

The report of the trustees was approved by the trustees on 6 December 2024 and signed on their behalf by:

Signature: 

Print name: Mary Nicholson

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF UNIVERSIFY EDUCATION

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 ("the Charities Act") and that an independent examination is needed

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention

Basis of independent examiner's statement


My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no material matters have come to my attention which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

Signed: 
Date: 9TH JANUARY 2025

Name: Thomas Bradley ACMA

Relevant professional body if any: CIMA

Address: 16, Rue Adam Roberti, Luxembourg-Merl, L-2429, Luxembourg

Income and Expenditure Account Universify Education 1 May 2023 to 30 April 2024

Income	2023-24	2022-23	Notes
Unrestricted income	97,228.39	85,486.00	
Restricted income	73,490.00	101,169.00	1
Interest income	219.32		
Income from charitable activities	14,500.23	13,500.00	2
Grant income	0.00	17,158.71	3
Total donation income	185,437.94	217,313.71	
Benefits in kind received			
College accommodation and meals	134,872.00	214,314.00	4
Other benefits in kind	27,400.00	21,400.00	5
Total income	347,709.94	453,027.71	
Programme costs			
Coach platform	1,436.10	2,083.92	
On course - Activities	3,054.36	2,989.26	
Volunteer recruitment and training	555.50	1,012.80	6
Volunteer travel	3,151.12	3,665.65	
Tutor costs	5,350.79	7,173.70	7
Volunteer engagement	175.18	720.31	
College accommodation and meals	134,872.00	214,314.00	8
Other benefits in kind	27,400.00	21,400.00	
Total programme costs	175,995.05	253,359.64	
Net income less programme costs	171,714.89	199,668.07	
Expenditure			
Advertising & Marketing	349.59	248.50	
Depreciation expense	748.11	748.11	9
Fundraising costs	985.98	1,081.25	
General Administrative Expenses	208.53	214.67	10
Head Office Recruitment	728.00	755.00	
Independent Evaluation	1,350.00	4,600.00	11
Insurance	595.95	536.78	
IT Software and Consumables	777.24	4,070.35	12
Staff salaries, pensions and NI	163,520.68	146,305.51	13
Staff Training and engagement	585.00	1,594.86	14
Travel - National	1,805.24	1,570.57	
Trustee Expenses		72.85	
Total Expenditure	171,654.32	161,798.45	
Net movement in funds	60.57	37,869.62	
Funds at the start of the year	95,163.35	57,293.73	
Funds at the end of the year	95,223.92	95,163.35	15

Balance Sheet Universify Education as at 30 April 2024

Fixed Assets	Apr-24	Apr-23	Notes
Tangible Assets			
Computer Equipment	2,992.43	2,992.43	9
Less Accumulated Depreciation on Computer Equipment	(1,496.22)	(748.11)	
Total Tangible Assets	1,496.21	2,244.32	
Total Fixed Assets	1,496.21	2,244.32	
Current Assets			
Cash at bank and in hand			
Expenses account	2,475.33	128.29	
Cash at bank	163,634.16	161,599.90	
Total Cash at bank and in hand	166,109.49	161,728.19	
Prepayments	285.00	293.75	16
Total Current Assets	166,394.49	162,021.94	
Liabilities: amounts falling due within one year			
Accounts Payable	230.05		
Accruals	233.00	810.00	
Deferred income	69,250.00	65,816.53	17
Operations Payable	2,953.73	2,476.38	18
Total Liabilities: amounts falling due within one year	72,666.78	69,102.91	
Net Current Assets	93,727.71	92,919.03	
Net Assets	95,223.92	95,163.35	
Funds of the Charity			
Unrestricted income funds	95,223.92	95,163.35	15
Restricted income funds		-	
Total funds of the Charity	95,223.92	95,163.35	

Within this financial period there are no new fixed assets, all income during this accounting period was in the form of donations, donated facilities and services.

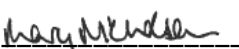
The company was entitled to exemption from audit under s477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to small companies subject to the small companies regime and in accordance with FRS102 SORP.

Approved by the directors and authorised for issue on 6 December 2024.

Signed by  on behalf of all the trustees/directors

Print Name: Mary Nicholson Date: 9 January 2025

Notes forming part of the Financial Statements

	Amount	Detail
1) Restricted income usage Project	£ 43,240.00	Funding for participants from specific regions including London, Birmingham, Staffordshire and Bristol; Funding for student places on the year-long programme
Partner University college part-funding	£ 30,250.00	Part-funding of participant places from a partner college to fund cohort expansion
Total	£ 73,490.00	

2) Other revenue refers to income generated providing support to partners to deliver activities contributing to their shared missions, for example recruiting students from underrepresented backgrounds for a STEM day

3) Grant income refers to income through the government Kickstart scheme, which ended in 2022.

4) Benefits in kind - accommodation, meals, and classroom space from partner university colleges. In 2023-24

Benefit in kind breakdown

Accommodation	£ 93,160.00
Meals	£ 30,912.00
Teaching space	£ 10,800.00
Total	£ 134,872.00

5) Other benefits in kind includes office space and staff time donated by Oxford Summer Courses and True Global Ltd

Item	Cost
True office space	£ 12,000
Oxford Summer Courses office space	£ 12,000
Oxford Summer Courses staff time donation scheme*	£ 3,400
Total other benefits in kind	£ 27,400

*Staff time donation scheme involves Oxford Summer Courses matching volunteer time by with time at work up to a day a month.

6) On course staff training provided pro bono in 2023-24.

7) Reduction in Year 10-11 programme course size from 169 participants to 120 resulting in reduced tutor costs due to fewer classes running (from £7,173.70 in 2022-23 to £5,350.79 in 2023-24).

8) Reduced college accommodation and meals costs due to the reduction in course size.

9) Computer equipment*

Assets at 30th April 2024	Computer equipment	
Cost at 1st May 2022	£	2,992.43
Additions	£	-
Disposals	£	-
<hr/> At 30th April 2024	£	<hr/> 2,992.43
Depreciation		
At 1st May 2023	-£	748.11
Charge for the year	-£	748.11
Disposals	£	-
<hr/> At 30th April 2024	£	<hr/> 1,496.21
<hr/>		
Net book amount at 30th April 2024	£	1,496.21

*Computer equipment depreciation policy is straight line over four years

10) General expenses include postage costs, registration and filing costs, and bank fees.

11) Decreased independent evaluation costs (from £4,600 in 2022-23 to £1,400 in 2023-24) after long-term impact research project, employing one consultant, ended.

12) Decrease from 2022-23 due to the completion of Salesforce development to create resilience, efficiencies and scalability in digital systems (from £4,021.55 in 2022-23 to £777.24 in 2023-24).

13) Staff costs consist of salaries, NI and pensions. The increase in salaries reflects the increased headcount from Nov 2022.

14) Decreased staff training cost after the end of the government Kickstart scheme, which required additional staff training as part of the grant conditions.

15) In accordance with the charity's reserves policy, of the total funds carried forward on 30th April 2024 (£95,223.92) there are £40,223.92 of surplus reserves. The charity's surplus reserves are any reserves additional to the minimum reserves amount of £55,000, which represents approximately 3 months operating costs. Trustees review University's surplus and minimum reserves position at quarterly board meetings and consider the best use of surplus reserves based on fundraising success and strategic objectives.

16) Prepayments cover expenditure incurred in 2022-23 for 2023-24 expenses, such as insurance cover, ICO subscription, coaching platform subscription, and website hosting

17) Deferred income includes funding for 2024-25 programme cycle.

18) Operations payable includes NIC, PAYE, pensions, student loans and unpaid expenses.

UNIVERSITY DESTINATION DATA



IMPACT REPORT 2024

Executive Summary



We are delighted to present this year's university destination report which demonstrates that Universify's work has contributed to young people from underrepresented and low socio-economic backgrounds accessing university at rates higher than those from similar

backgrounds, successfully tackling the key risks identified by the Office for Students which prevent young people from reaching higher education.

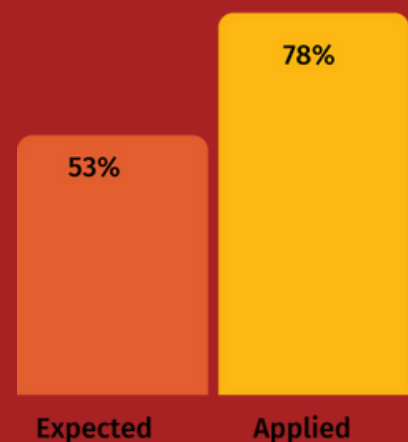
Our programme starts earlier, at age 15, to raise GCSE attainment, help participants overcome self-limiting beliefs around individual aspirations, and to equip them with the skills and confidence to realise their potential.

Universify participants apply to and take up places at the most selective universities at rates higher than expected for young people from similar backgrounds. These highly-selective universities are the institutions where the barriers to access, but also the social mobility benefits are often greatest, such as Oxford and Cambridge universities where our programmes are currently hosted.

As we look to expand our programme and partner with more universities to meet the growing demand for our work, it is compelling to see our participants apply to our partner institutions at a rate significantly higher than expected. I invite you to read on to hear about this success in context, from Alex Dunn, one of our alumni, who has shared how the programme shaped his journey to getting into Oxford.



of those eligible for Free School Meals



More Universify participants applied to university than expected

Alex Whitton, CEO, Universify Education

Increasing Access to Universities

HOW UNIVERSIFY SUPPORTS ACCESS TO HIGHER EDUCATION

Our programme features two university residentials, enabling young people to get first-hand experience of the academic environment and make more informed decisions about their future pathways, including whether to pursue a degree. Increasing familiarity with university early on in a young person's education helps to tackle the development of limiting beliefs, such as 'university is not a place for people like me', which many underrepresented groups report as a significant barrier to access.[1]

Moreover, hosting our programme residentials at high-tariff universities like Oxford and Cambridge encourages our participants to seriously consider studying at these institutions specifically, which is reflected in our Cohort 4 participants making significantly higher applications to Oxbridge than would be expected.[2]

Hosting our programme at high-tariff universities... encourages our participants to seriously consider studying at these institutions specifically.



'I really liked the fact we were able to stay at university and have a mini experience as a university student. There weren't any other programmes like that and it cemented that I did want to go to university.'

Tawana, 2019-2020 programme participant

[1] Free School Meals (FSM) are a means tested benefit and indicator of low household income. Young people eligible for Free School Meals are significantly underrepresented at universities, particularly those with the most selective entry requirements.

Parliamentary Research Briefing, 'Equality of access and outcomes in higher education in England'. <https://researchbriefings.files.parliament.uk/documents/CBP-9195/CBP-9195.pdf>. Accessed 14 May 2024

[2] High-tariff universities are the top third of universities ranked according to their entry tariff points score by UCAS. They represent the universities which are most selective.

Our Impact

This report presents the university destination data for Cohort 4 (148 participants), who took part in our year-long programme in 2019-2020.

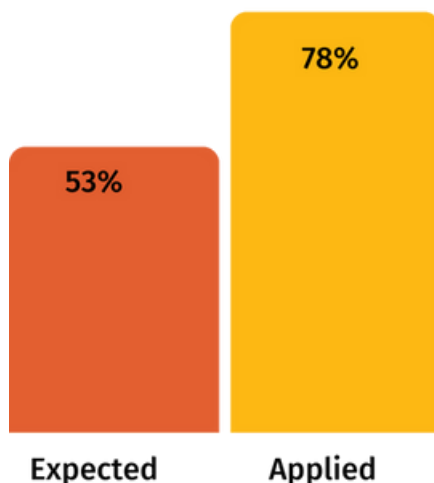
Data provided by the UCAS Outreach Evaluator tracked the progression of University participants to higher education across the 2022 and 2023 admission cycles. [3] The Outreach Evaluator provides us with a tailored benchmark of students and statistically evaluates differences in the rates of university progression between University participants and students from similar backgrounds.[4]

Universities where three or more Cohort 4 participants accepted offers:

- Cardiff University
- University of Exeter
- University of Kent
- University of Manchester
- University of Sheffield
- University of Surrey
- University of Warwick

INCREASED APPLICATIONS TO UNIVERSITY

The number of University Cohort 4 participants who applied to university across 2022 and 2023 admissions cycles was statistically 'very high' compared to the UCAS benchmark. Of the 148 Cohort 4 participants, 78% applied to university compared to 53% which would be expected according to the UCAS tailored benchmark.



University participants applied to university at a significantly higher rate than expected



[3] UCAS, the Universities and Colleges Admissions Service, is the UK's shared admissions service for higher education. The Outreach Evaluator provides statistical evidence on the impacts of engagement activities for higher education providers and charitable organisations. <https://www.ucas.com/providers/our-products-and-services/data-products-and-solutions/outreach-evaluator-tracking-results>. Accessed 14 May 2024

[4] Our impact data is further validated by an independent evaluator to ensure accuracy and robustness.

MORE STUDENTS APPLIED TO HIGH-TARIFF UNIVERSITIES

The number of Universify participants who applied to high-tariff, Russell Group and Oxbridge universities was statistically ‘very high’ compared to the UCAS benchmark. Of the 148 Cohort 4 participants, 54% applied to high-tariff universities compared to the benchmark of 29%, 54% applied to Russell Group universities compared to the benchmark of 31%, and 10% applied to Oxbridge compared to the benchmark of 2%.

‘I decided to apply to Oxford after the [Universify] programme, when before I wasn’t thinking of applying. Mainly because the programme made it seem like somewhere I could go even though I was from a state school.’

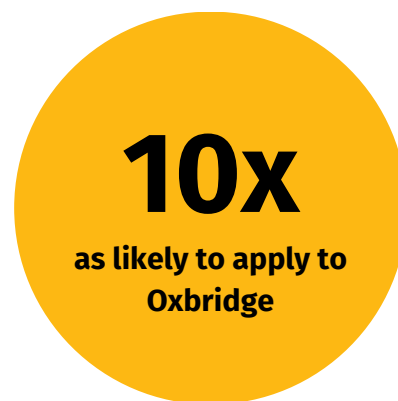
Tawana, 2019 - 2020 programme participant

INCREASED FSM ELIGIBLE PARTICIPANTS APPLIED TO UNIVERSITY

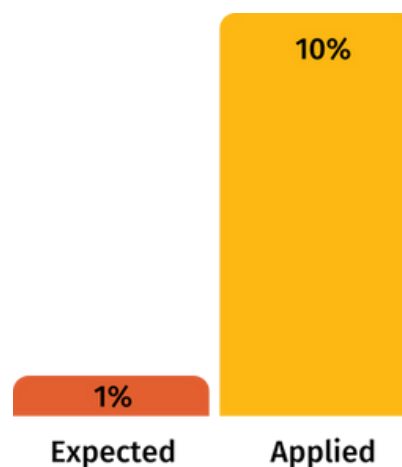
Of the 148 students in Cohort 4, 48 were eligible for Free School Meals (FSM), a means tested benefit and indicator of low household income.

UCAS data shows that a ‘significantly high’ number of FSM participants from Cohort 4 applied to university (73%) compared to a tailored benchmark (54%).

Universify Cohort 4 participants eligible for Free School Meals progressed to high-tariff universities at a rate almost twice that of FSM students nationally (6% vs 3.4%), and, for the first time, a ‘very significantly high’ number of Universify FSM students applied to Oxbridge (10% vs 1%).



of those eligible for Free School Meals



Significantly more Free School Meals participants applied to Oxbridge than expected



Why University Access Matters

Our programme is designed to increase access to universities because they remain significant vehicles for social mobility. Degree qualifications open pathways into skilled professions that are otherwise inaccessible, such as law, medicine, education, STEM, and research. On average graduates have significantly higher lifetime earnings with the median 40-year-old graduate earning twice as much as someone qualified to GCSE level or below.[5] This increased earning potential increases graduates capacity to reinvest in their communities helping to reduce cycles of poverty.



The underrepresentation of talented people from socio-economically disadvantaged backgrounds in these fields represents a waste of potential for not just the individual, but also wider society. Improving access to higher education can therefore help to redress systemic inequalities and reduce cycles of deprivation. By encouraging more young people to apply to university, more students from underrepresented backgrounds are accepted onto degree courses enabling them to gain the benefits of higher education.

Cohort 4 participants who were eligible for Free School Meals progressed to high-tariff universities at a rate almost

2x

the national average (6% vs 3.4%)

Hear our latest cohort of students' perspectives on why university access matters by watching our video [here](#).



[5] Institute for Fiscal Studies, 'Education Inequalities: IFS Deaton Review'. <https://ifs.org.uk/inequality/wp-content/uploads/2022/08/Education-inequalities.pdf>. Accessed 14 May 2024.

Universify Alumni: Alex's Story



Before starting our programme Alex had considered studying a degree in the future but was unsure about which subject to study or how to apply.

Alex is now studying French at the University of Oxford, a subject he nearly gave up after GCSE.

“THE PROGRAMME DEFINITELY HELPED ME BUILD CONFIDENCE”

“At that point I didn't know what A Levels I was going to choose...However, the programme definitely helped me build confidence and build a revision approach for studying French which I wasn't necessarily planning to do at A level but after doing quite well at French GCSE, I did it for A Level and now I'm studying it at uni.”

“UNIVERSIFY HELPED ME WITH MY GCSEs [...] WHICH INFLUENCED MY DECISIONS”

“In terms of choosing A Levels, I made this decision after getting my GCSE results, and indirectly I think Universify helped me with my GCSEs which got me my results which influenced my decisions.”

“PREPARING YOU FOR THE UNIVERSITY EXPERIENCE IS VERY MUCH THE STRENGTH OF THE PROGRAMME”

“In general, preparing you for the university experience is very much the strength of the programme as we're brought into the university setting and we're doing university-style things. It just kind of brings what you'll be doing at university closer, and it gives you familiarity with that even before you decide to apply and end up in university, and that kind of preparation is helpful.”





OXFORD SUMMER COURSES



THE NISBET TRUST

WALCOT FOUNDATION



Academies Trust



SURVEYTECH



Fair
Education
Alliance

How to get involved

We believe universities should be open to everyone, based on academic potential and regardless of background. If you would like to support our mission, please get in touch at info@universifyeducation.com, or sign up to our mailing list via the website.

Published June 2024.

Registered Charity number: 1167240

Company Registration number: 10114061 (England & Wales)

www.universifyeducation.com



UNIVERSIFY EDUCATION

England & Wales - Charity number 1167240

Accounts

Charity number: 1167240
Company Registration number: 10114061 (England & Wales)



**Trustees' Report and Unaudited Accounts
For the Year Ended 30 April 2023**

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Universify Education reference and administrative details

Trustees during the year ended 30 April 2023 and up to the date of this report

Ms Mary Nicholson (Chair)

Mr Harry Hortyn

Dr Steve Rayner

Mr Matt Lacey

Mr Robert Phipps (resigned 17th June 2022)

Mr Tibor Gold (resigned 17th June 2022)

Miss Katherine Davies (resigned 17th June 2022)

Mrs Kate West (resigned 22nd August 2022)

Mr James Gregory (appointed 17th June 2022)

Miss Helen Norman (appointed 17th June 2022)

Mr Marco Logiudice (appointed 17th June 2022)

Mr Steven Smith (appointed 7 December 2023)

Ms Amy Ellis-Thompson (appointed 7 December 2023)

Company Number: 10114061 (England and Wales)

Charity Registration Number: 1167240

Registration Office: 18 Beaumont Street, Oxford OX1 2NA

Bankers: HSBC 65 Cornmarket Street, Oxford OX1 3HY

Independent Examiner: Thomas Bradley ACMA

Trustees' report incorporating the trustees' report

1. Introduction

This report should be read in conjunction with our latest impact report which is published on www.universifyeducation.com/impact. The Impact Report details the impact that Universify Education has achieved and the methodology behind how this impact is measured.

This report was prepared on behalf of the trustees in accordance with FRS102 SORP Accounting and Reporting by Charities guidelines.

2. Objectives and activities

Objectives and aims

Universify Education's charitable purpose, as set out in the governing document, is to provide equality of opportunity in education in the UK as the trustees see fit.

The charity's vision is to support young people to realise their potential, regardless of background.

Universify Education aims to fulfil this vision and create a fairer society through social mobility by supporting young people from low-socioeconomic and underrepresented backgrounds to fulfil their potential through education, regardless of their background. Too often, a young person's background limits their aspirations, GCSE grades and understanding of university (often believing it is not for people 'like me') which impacts whether they are able to make and pursue an informed decision about their future, including whether to apply and go to university. This in turn limits their ability to access transformative personal development and further educational opportunities and perpetuates a cycle of underrepresentation both in Higher Education and in society. Underrepresentation in Higher Education limits social mobility and is to the detriment of society as graduates often take up important decision-making roles in society without being representative of that society, reinforcing existing inequalities.

With the input of sector leaders, the charity designed the Universify programme to overcome three major barriers faced by participants from low socio-economic and underrepresented backgrounds to gaining the skills, knowledge and belief to fulfil their potential through education, including successfully applying to highly-selective universities. These barriers are:

1. Limited academic attainment
2. Limited aspirations
3. Feeling out of place in a university setting

The Universify Education programme aims to overcome these barriers by achieving the following outcomes:

1. Broadening and increasing aspirations
2. Increased attainment at GCSE
3. Increased understanding of university and university admissions

By achieving these aims Universify seeks to provide its beneficiaries with the skills knowledge and belief to make and fulfil a more informed decision about their futures allowing them to thrive regardless of their background.

The main activities of the charity

The charity undertakes a year-long programme for Year 10 students (aged 14-16) from non-selective state schools. The intervention comprises three elements to equip young people with the skills, knowledge and belief to realise their potential.

1. **A week-long residential summer programme at partner universities** – the residential programme provides an authentic undergraduate student experience to enable participants to feel at home in a university setting and able to make a more informed decision about their future in education. Participants attend academic classes covering a broad curriculum of subjects to improve subject knowledge and critical thinking, providing an insight into the depth and level of undergraduate study. Sessions on university admissions and university life improve participants' understanding of universities, their environment, and the admissions process. Participants complete a group work project, building on the university admissions session by designing a university, encouraging participants to consider what they are looking for from university and what it offers. Additionally, participants take part in social activities to help them feel 'at home' at university, to challenge preconceptions, and to form supportive friendships with like-minded students to boost participant aspirations and attainment, as they support each other in a community which they may struggle to find back at school.

2. **Monthly one-to-one coaching** - Coaching empowers students to be self-directed learners. We pair students with a coach, usually a current/recent undergraduate, with shared interests. Unlike mentors, a coach does not focus on giving advice. Instead, they guide students through the process of reflecting on what they want to achieve and creating a plan to reach their aspirations. This helps students to explore their unique strengths and interests to gain the confidence and problem-solving skills to commit to their chosen path both during and beyond the Universify programme. In the short-term coaching also provides a space for students to set and work towards academic goals to boost their GCSE attainment as the foundation for pursuing future opportunities.
3. **A 3-day Spring revision residential** - participants return to host partner universities during the spring of Year 11 to revise core subjects for their upcoming GCSEs, gaining the tools to attain the best grades. Here participants also look beyond Universify as we aim to create a pipeline of ongoing support for students, by supporting them to engage with further programmes, such as the Sutton Trust Summer School, Multiverse, and UNIQ. Students also complete an employability workshop to improve knowledge of the opportunities and options offered by a degree. After completing the spring residential, remote coaching continues until participants receive their GCSE results.

Following the completion of the year-long programme Universify participants become Universify alumni, receiving a monthly newsletter to share participants' stories post-Universify and highlight further opportunities on other programmes and career, internship and work experience programmes. This has led to many alumni joining Year 12 programmes such as In2Science, the Social Mobility Foundation programme, and the Sutton Trust Summer school as well as becoming members of the Fair Education Alliance Youth Steering Group and receiving life changing scholarships and employment opportunities.

Delivering the Universify programme

A Universify Head Office team prepares the courses, trains, and supports volunteer and tutor delivery teams, and oversees safeguarding, with three Designated Safeguarding Leads, of which two are also trained Mental Health First Aiders. The programme and

coaching are delivered by volunteers, who are all recent or current university students from across the UK. Course Directors, experienced in running residential, oversee the courses and all volunteers are trained in coaching, health and safety, and safeguarding. Volunteers undergo enhanced DBS checks and two reference checks, are trained by University staff in our policies and procedures, and attend regular course catchups to receive support and guidance with remote coaching. The University safeguarding team is also contactable outside of formal catchups to support volunteers with any concerns. Seminars are delivered by experienced university tutors and revision classes taught by current GCSE tutors with a strong knowledge of the syllabus. All classes have a volunteer present to support in the delivery of the classes.

The charity works closely with other institutions to deliver its activities. University works with secondary schools across the country who send participants on our programme. We partner with colleges at the Universities of Oxford and Cambridge, working with their link regions and holding our residential at these colleges. In 2022-23 we partnered with Jesus College, Somerville College, and St Hugh's College at the University of Oxford and with St Catharine's College at the University of Cambridge.

Ensuring the charity's work delivers its aims

The charity measures its impact annually, through pre- and post-course surveys to gather participant feedback. University's impact measurement methodology was designed by our former trustee for impact measurement, Dr George Hoare, and an independent impact evaluator, Ellie Harries, who annually reviews our data and impact report to ensure it is accurate. The charity also reviews its impact measurement approach annually.

The findings of the impact report measure how successfully the charity is providing participants with the skills, knowledge, and belief to realise their potential. We measure this against our three desired short-term outcomes: raising aspirations, academic attainment, and understanding of university and university admissions and our long-term mission of improving social mobility and overcoming underrepresentation at university by increasing the likelihood of making a successful application to university. These findings are used to refine the University programme to make sure activities are as effective as possible in achieving the charity's objectives. In addition, feedback is gathered from University participants, volunteers, and staff as part of an annual

programme review contributing to the development and implementation of an annual improvement plan.

To ensure our work continues to best meet the needs of our beneficiaries, the charity recruits a student council of University alumni. Two students from the council act as student representatives attending board meetings. The student council and representatives work with University and alumni and are consulted on the charity's strategy and programme plans to ensure the University programme continues to be directed by the charity's beneficiaries.

How the charity's activities deliver public benefit

The activities undertaken further the charity's purposes for the public benefit increasing social mobility by equipping young people with the skills, knowledge, and belief to realise their potential regardless of their background. As a result these young people are able to access life changing education, employment and training opportunities, such as university.

The trustees have had regard to the Charity Commission's guidance on public benefit.

3. Achievements and performance

During the year 2022-23 the charity delivered its programme to 169 participants. The charity also evaluated the impact of the programme on its third cohort who completed the University Education Spring residential in April 2019.

A full summary of the charity's ongoing impact and achievements can be found in its latest impact report - <https://www.universifyeducation.com/impact>.

How the charity performed against its objectives

For 2022-23 the charity continued to work towards the following long-term objectives:

1. Achieving a strong delivery record that is demonstrated by robust impact measurement
2. Financial sustainability
3. Develop partnerships to grow the University programme

In achieving these two long-term objectives the charity will be in a position to sustainably scale its work and achieve greater impact by reaching more young people with an evaluated and refined intervention.

To move towards these objectives the charity outlined the following short-term goals:

1. Successfully deliver Universify's year-long in-person programme across two cities
2. Diversify fundraising within and across income streams to enable financial resilience and future growth
3. Implement a plan to gather detailed, individual destination data for Universify alumni to track our long-term impact and refine our programme to maximise its impact.
4. Approach universities and university colleges to explore partnerships to expand the Universify programme and fulfil a shared access vision

In 2022-23, Universify continued to deliver positive impact while the accounts, included in this report, show that the charity has continued to work within its financial constraints.

The financial review also shows that progress has been made to diversify Universify's income to increase financial resilience and develop the sustainability required to scale the programme. To help us work towards this goal Universify recruited a part-time fundraiser through the government Kickstart scheme which provided employment opportunities to a young person during the pandemic. The impact of the Kickstarter was significant in securing additional trust and foundation grants. This fundraising success meant we from May 2022 this fundraising Kickstarter joined the organization on a full-time, permanent basis to enable us to continue to diversify our income streams so we can sustainably scale the Universify programme.

Financial review

The direct resource costs of the Summer and Spring programmes are summarised in the charity's accounts which have been prepared in accordance with the provisions applicable to small companies limited by guarantee regime and FRS102 SORP Accounting and Reporting by Charities.

- £200,155.00 of income related to donations from charitable trusts and foundations, corporate partners, public fundraising, and private individuals.
- £17,158.71 of income related to grants through the government Kickstart scheme
- £235,714.00 worth of benefits in kind were received in the form of donated office space and services from Oxford Summer Courses Limited and office space from True and accommodation, meals and classrooms donated by partner University

colleges who host the Universify residentials. The benefits were calculated by conforming to the market value at the time of use.

- There was a surplus generated in this year of £37,869.62, which is due to success in fundraising and running under budget. These funds will contribute to increasing the charity's resilience following the instability of the pandemic and challenging fundraising landscape created by the Cost of Living Crisis as well as allowing the charity to reinvest these funds in sustainably scaling our work to achieve more impact.

In the accounting period May 2022 to April 2023 income came from fundraising activity including private donations, corporate donations and partnerships, successful applications to trusts and foundations and public fundraising.

Reserves policy and amount of reserves held

Universify Education's aim is to generate and maintain minimum reserves equal to 3 months' running costs through fundraising activity. These minimum reserves are built up after considering future costs that are committed to delivering our year-long programme. The financial position of Universify Education at the end of the seventh year of operations is that there is £95,163.35 in reserves. Of these reserves £55,000 meet the three month minimum reserves threshold with the remaining £40,163.35 surplus reserves. Our surplus reserves are any reserves additional to our minimum reserves amount of 3 months operating costs. Trustees review Universify's surplus and minimum reserves position at quarterly board meetings and consider the best use of surplus reserves based on fundraising success, the fundraising landscape and the charity's long-term strategic objectives.

Despite the forecast challenging fundraising landscape with the ongoing Cost of Living crisis, Universify has reached the targeted level of reserves. With the securing of £65,816.53 of income for 2023-24 the trustees are confident of the charity's ability to continue as a going concern for the next 12 months.

There are no funds or subsidiary undertakings that are materially in deficit.

Principal sources of funds

In general, the principal funding sources for the charity are through fundraising income from trusts and foundations, public fundraising, private donors, and corporate partnerships.

For 2022-23, the Charity received £76,969.00 in trust and foundation grants, these included a fourth-year tail off grant from Macquarie Group Foundation following a three-year partnership and grants for participants including those from London and Kent. The charity raised £39,625.00 from corporate partnerships, including the deferred fifth year of start up funding from Oxford Summer Courses. As part of the charity's work to diversify income and build on the pilot part-funding model with Jesus College, University of Oxford, the charity received £44,600.00 in part-funding from partner colleges. The charity received support for staff costs through the government Kickstart scheme, where Universify supported four young people in receipt of Universal Credit to provide a six-month work placement and training to support their future employment. The Government Kickstart scheme allowed us to increase our fundraising capacity which contributed to increased fundraising success as we were able to produce more high-quality applications to trusts and foundations. In addition, the charity continued to maintain consistency in public fundraising income, which increased during the pandemic.

For 2023-24, the charity has secured £65,816.53 of income for the next financial year through trusts and foundation grants towards the 2023-24 programme, income generated during the 2022 Big Give Christmas Challenge and through renewed and new partnerships, notably with our new partner True.

Plans for future periods

Although we have seen increased fundraising success and a return to in-person delivery in 2022-23, the charity's aims for 2023-24 are shaped in the context of the cost of living crisis. In this context the charity is aware of the impact this could have on the fundraising landscape. Therefore, fundraising will remain a priority both to diversify the charity's income to facilitate sustainable scale and to build financial resilience. The cost of living crisis is also likely to increase the growing demand and need for Universify's work. Therefore, the other major focus for the charity in the upcoming year will be to lay the foundations to meet this growing demand.

Practically this means more partnerships with university colleges and universities outside of Oxford and Cambridge to increase the number of places on the Universify programme.

The charity also recognizes the importance of expanding beyond the Universities of Oxford and Cambridge to overcome the geographical barriers some participants face to accessing the programmes in these two cities. This approach will seek to fulfil the charity's long-term sustainability plan of working with Widening Participation Offices at the universities of college partners, becoming part of their Access and Participation Plans, which are funded by the Office for Students. In the next period the charity will seek to build on the part-funded college relationships by approaching more colleges and universities utilising this model for sustainable growth.

The charity recognises that expansion requires the resources to do so and programme growth will always be considered by trustees in line with financial constraints, ongoing fundraising work, and the awareness of the increasing demand for the charity's work.

4. Structure, governance, and management

Universify Education is a company limited by guarantee incorporated on 9th April 2016 and registered as a charity on 20th May 2016.

The company was established under a Memorandum of Association which outlined the objects and powers of the charitable company and is governed under its Articles of Association.

Recruitment and appointment of trustees

The Trustees who served during the period and up to the date of this report are set out on page 3.

The charity uses an annual trustee skills audit to assess whether the board has the appropriate mix of skills. Gaps may be met with training, third party expertise or new trustee recruitment. When recruiting new trustees, the board aims to find individuals who can support the charity's growth and bring in additional resources, expertise, lived experience and connections to help Universify achieve its goals.

The results of this annual trustee skills audit highlighted gaps that the board chose to fill by recruiting additional trustees. In particular the board sought to add more trustees with recent lived experience of the challenges faced by our beneficiaries and recent experience of the education system to ensure our work continues to best meet the needs of our beneficiaries.

To ensure a fair and nondiscriminatory recruitment process Universify Education followed the UK Employment legislations and Charity Commission's CC30 trustee recruitment guidance. No other person or external body is entitled to appoint charity trustees.

Organisational structure

The role of the Board is to provide oversight of the charity's activities, including planning, approval of annual budgets and review of the charity's strategy, results, and achievements. The Board also provides general support to the staff. The day-to-day running of the charity is carried out by the staff team, with support from volunteers. During the year to April 2023 the board met four times for quarterly board meetings twice for ad-hoc meeting and once for an annual strategy day.

Risk management

The Trustees have conducted a review of the major risks to which the charity is exposed. A risk register has been established and is reviewed at quarterly board meetings. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces. Identified risks are minimised by the implementation of procedures for safeguarding staff, volunteers, and participants. These procedures are reviewed annually to ensure that they continue to meet the needs of the charity. The charity is supported in the development of its policies and procedures by Oxford Summer Courses Limited, whose policies and procedures have been accredited by the British Accreditation Council.

Trustees' duties

- Act as stewards of Universify Education so that the charity can most fully deliver on its mission to address educational inequality in the long-term. Trustees will consider issues of strategic (rather than operational) importance at quarterly meetings
- Attend at least 75% of the quarterly Trustees meetings that will be held online and in-person in Oxford and London (reasonable transport expenses will be reimbursed), having read any briefings which will be circulated at least 7 days prior to the meeting date
- Trustees will have specific duties related to an area of expertise that is agreed when they are recruited to the board of trustees. Trustees must be clear what

information they need from staff to carry out their governance role properly, and any required training or resources are provided.

During the period during this year where the infection rates for COVID-19 pandemic remained high and restrictions remained in place board meetings were held online. Following the easing of restrictions and the return to in-person programme delivery board meetings are now run in a hybrid manner allowing trustees to join online or in-person.


2022-23 trustees' areas of focus

Trustee	Date appointed	Focus area
Harry Hortyn	May-16	<ul style="list-style-type: none"> • Brings experience of running accredited academic short courses as co-founder of Oxford Summer Courses Limited and 5 years in social investment • Supports charity strategy, provides links to key stakeholders in Oxford and oversees sign-off of Oxford Summer Courses' contributions. • Previous chair of the board
Robert Phipps	May-16 Retired June-22	<ul style="list-style-type: none"> • Brings experience of running accredited academic short courses as co-founder of Oxford Summer Courses Limited and background in strategy consultancy
Matt Lacey	May-17	<ul style="list-style-type: none"> • Brings experience as CEO of surveying company and a background in acting and media • Profile-building through press coverage, speaking platforms
Steve Rayner	Aug-17	<ul style="list-style-type: none"> • Brings experience of university admissions, tuition, and governance • Providing advice on programme development and approaches to colleges or universities, and partnership with Somerville college
Mary Nicholson	Jun-18	<ul style="list-style-type: none"> • Brings experience of risk and financial management from background in risk and sustainability in the finance and banking sector • Current Chair of the board
Tibor Gold MBE	Dec-18 Retired Jun-22	<ul style="list-style-type: none"> • Brings experience in IP law and over a decade of trusteeships • Providing advice on fundraising and approaches and introductions to corporate partners
Kate West	Jun-19 Retired Aug-22	<ul style="list-style-type: none"> • Brings fundraising experience, offering insight and guidance on Universify's fundraising strategy

Kathryn Davies	Jun-19 Retired Jun-22	<ul style="list-style-type: none"> • Brings experience working within the sector and of impact reporting to help Universify continue to robustly collect and report on its impact.
Helen Norman	March-22	<ul style="list-style-type: none"> • Brings recent lived experience of the education system and challenges faced by beneficiaries to fulfil their potential in education • Brings experience working in the sector
James Gregory	Jun-22	<ul style="list-style-type: none"> • Providing teacher insight to school and student recruitment and programme design • Brings safeguarding experience
Marco Loguidice	Jun-22	<ul style="list-style-type: none"> • Brings recent lived experience of the education system, experience as a former Universify volunteer and experience of the challenges faced by beneficiaries to fulfil their potential in education • Brings fundraising and strategic experience

To ensure the charity continues to best meet the needs of its beneficiaries Universify Education appoints a Student Representative who is a member of the student council and a recent Universify alumnus. The Student Representative attends trustee board meetings but does not hold legal responsibility for the charity in the same way as the other trustees.

The report of the trustees was approved by the trustees on 7 December 2023 and signed on their behalf by:

Signature: 

Print name: Mary Nicholson

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF UNIVERSIFY EDUCATION

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 ("the Charities Act") and that an independent examination is needed

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention

Basis of independent examiner's statement


My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no material matters have come to my attention which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

Signed: 

Date: 5th January 2024

Name: Thomas Bradley ACMA

Relevant professional body if any: CIMA

Address: 16, Rue Adam Roberti, Luxembourg-Merl, L-2429, Luxembourg

Income and Expenditure Account University Education 1 May 2022 to 30 April 2023			
Income	2022-23	2021-22	Notes
Unrestricted income	85,486.00	59,322.90	
Restricted income	101,169.00	85,948.11	1
Income from charitable activities	13,500.00	7,579.04	2
Grant income	17,158.71	15,830.25	3
Total donation income	217,313.71	168,680.30	
Benefits in kind received			
College accommodation and meals	214,314.00	80,248.00	4
Other benefits in kind	21,400.00	14,175.00	5
Total income	453,027.71	263,103.30	
Programme costs			
Coach platform	2,083.92	498.00	6
Head Office Recruitment	755.00	0.00	
Head Office staff engagement	287.30	0.00	
Kit inventory	1.10	0.00	
On course - Activities	2,958.16	2,852.26	
On Course-Staff Training	425.80	819.68	
On Course-Staff Travel	3,665.65	1,865.03	7
Tutor costs	7,173.70	5,152.46	8
Volunteer engagement	720.31	224.50	
College accommodation and meals	214,314.00	80,248.00	
Other benefits in kind	21,400.00	14,175.00	
Total programme costs	253,784.94	105,834.93	
Net income less programme costs	199,242.77	157,268.37	
Expenditure			
Advertising & Marketing	248.50	831.26	9
Bank Fees	60.00	25.00	
Charitable and Political Donations	0.00	51.50	
Employers National Insurance	6,561.30	4,669.96	
Fundraising costs	1,081.25	427.87	
General Expenses	55.03	19.27	
Independent Evaluation	4,600.00	2,000.00	10
Insurance	536.78	335.20	
IT Software and Consumables	4,070.35	2,735.39	11
On Course - Staff Recruitment	587.00	1,071.20	
Pensions Costs	2,866.09	2,229.98	
Pleo default account	27.05	0.00	
Postage, Freight & Courier	24.59	142.55	
Printing & Stationery	0.00	8.90	
Registration and filing costs	13.00	13.00	
Salaries	136,878.12	110,077.27	12
Staff Training	1,307.56	238.00	13
Subscriptions	35.00	35.00	
Telephone & Internet	30.00	36.00	
Travel - National	1,570.57	854.32	14
Trustee Expenses	72.85	98.80	
Depreciation expense	748.11	0.00	17
Total Expenditure	161,373.15	125,900.47	
Current year funds	37,869.62	31,367.90	15
Retained funds	57,293.73	25,925.83	
Total funds carried forward	95,163.35	57,293.73	16

Balance Sheet Universify Education as at 30 April 2023

Fixed Assets	Apr-23	Apr-22	Notes
Tangible Assets			
Computer Equipment	2,992.43	2,992.43	17
Less Accumulated Depreciation on Computer Equipment	(748.11)	-	
Total Tangible Assets	2,244.32	2,992.43	
Total Fixed Assets	2,244.32	2,992.43	
Current Assets			
Cash at bank and in hand			
Expenses account	128.29	1,090.39	
Universify Education	161,599.90	93,557.40	
Total Cash at bank and in hand	161,728.19	94,647.79	
Prepayments	293.75	345.49	18
Total Current Assets	162,021.94	94,993.28	
Liabilities: amounts falling due within one year			
Accruals	810.00	2,506.91	
Deferred income	65,816.53	35,750.00	19
NIC Payable	607.78	802.77	
PAYE Payable	1,042.20	928.80	
Pensions Payable	763.55	680.75	
Student Loan Deductions Payable	20.00	-	
Unpaid Expense Claims	42.85	22.75	
Total Liabilities: amounts falling due within one year	69,102.91	40,691.98	
Net Current Assets	92,919.03	54,301.30	
Net Assets	95,163.35	57,293.73	
Funds of the Charity			
Unrestricted income funds	95,163.35	57,293.73	20
Restricted income funds	-	-	
Total funds of the Charity	95,163.35	57,293.73	

Within this financial period there are no new fixed assets, all income during this accounting period was in the form of donations, donated facilities and services.


The company was entitled to exemption from audit under s477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to small companies subject to the small companies regime and in accordance with FRS102 SORP.

Approved by the directors and authorised for issue on 7 December 2023.

Signed by  on behalf of all the trustees/directors

Print Name: Mary Nicholson Date: 2 January 2024

Notes forming part of the Financial Statements

1) Restricted income usage

	Amount	Detail
Project	£ 56,969.00	Funding for participants from specific regions including London and Kent; Funding for student places on our year-long programme; Funding for long-term impact evaluation work
Partner University college part-funding	£ 44,200.00	Part-funding of participant places from a partner college to fund cohort expansion
Total	£ 101,169.00	

2) Income from Charitable activities refers to income generated providing support to partners to deliver activities contributing to our shared missions, for example recruiting students from underrepresented backgrounds for a STEM day

3) Grant income refers to income through the government Kickstart scheme

4) Benefits in kind - accommodation, meals, and classroom space from partner university colleges. In 2022-23

Benefit in kind breakdown

Accommodation	£ 150,552.00
Meals	£ 50,112.00
Teaching space	£ 13,650.00
Total	£ 214,314.00

5) Other benefits in kind includes office space and staff time donated by Oxford Summer Courses and True

Item	Cost
Donated office space	£ 18,000
Oxford Summer Courses staff time donation scheme*	£ 3,400
Total other benefits in kind	£ 21,400

*Staff time donation scheme involves Oxford Summer Courses matching volunteer time by with time at work up to a day a month.

6) With the return to in-person delivery the cost of annual Zoom licenses have been moved from the 'On-Course - Activities' account to 'Coaching platforms' account.

7) The return to in-person delivery for both the Summer and Spring residential explains the increased On-course staff travel (from £1, 865.03 in 2021-22 to £3,665.65 in 2022-23).

- 8) The return to in-person delivery for both the Summer and Spring residential explains the increased tutor costs (from £5,152.46 in 2021-22 to £7,173.70 in 2022-23)
- 9) Reduction in marketing costs due to no photography being shot during the 2022-23 financial year
- 10) Increased independent evaluation costs (from £4,600 in 2021-22 to £2,000 in 2022-23) due to additional consultant support as part of long-term impact research work.
- 11) Increase from 2021-22 due to ongoing investment in Salesforce development to create resilience, efficiencies and scalability in digital systems (from £2,735.39 in 2021-22 to £4,070.35 in 2022-23). The development will mean that we have more efficient systems for volunteer, student and school recruitment and management and coaching management.
- 12) Increase in Salaries due to increased headcount as the team expanded to 5.8 FTE from Nov 2022
- 13) Increased staff training cost part of developing staff through government Kickstart scheme and upskilling fundraising expertise as part of objective to create diversified income streams.
- 14) Increased travel cost (from £1,570.57 in 2021-22 to £854.32 in 2022-23) a result of the easing of restrictions from the pandemic allowing more in-person meetings and staff travel to residential programmes.
- 15) The increase in surplus funds (from £31,367.90 in 2021-22 to £38,666.53 in 2022-23) was a result of running underbudget and increased fundraising success. These funds will contribute to increasing the charity's resilience following the instability of the pandemic and more importantly allow the charity to reinvest these funds in sustainably scaling our work to achieve more impact.

16) In accordance with our reserves policy of the total funds carried forward on 30th April 2023 (£95,163.35) we have £40,163.35 of surplus reserves. Our surplus reserves are any reserves additional to our minimum reserves amount of 3 months operating costs, which is £55,000. Trustees review University's surplus and minimum reserves position at quarterly board meetings and consider the best use of surplus reserves based on fundraising success and strategic objectives.

17) Computer equipment*

Assets at 30th April 2023	Computer equipment	
Cost at 1st May 2022	£	2,992.43
Additions	£	-
Disposals	£	-
At 30th April 2023	£	2,992.43
Depreciation		
At 1st May 2022	£	-
Charge for the year	£	(748.11)
Disposals	£	-
At 30th April 2023	£	(748.11)
Net book amount at 30th April 2023	£	2,244.32
Net book amount at 30th April 2022	£	2,992.43

*Computer equipment depreciation policy is straight line over four years

18) Prepayments cover expenditure incurred in 2022-22 for 2023-24 expenses, such as insurance cover, ICO subscription, our coaching platform subscription, and website hosting

19) Deferred income includes funding for 2023-24 programme cycle

20) Following a review of University's Reserves Policy in 2022-23, University ringfences a minimum reserves equivalent to three months as a guarantee for the next year's programme, which is £55,000. Trustees review University's surplus and minimum reserves position at quarterly board meetings and consider the best use of surplus reserves based on fundraising success and strategic objectives.



2023

IMPACT

REPORT

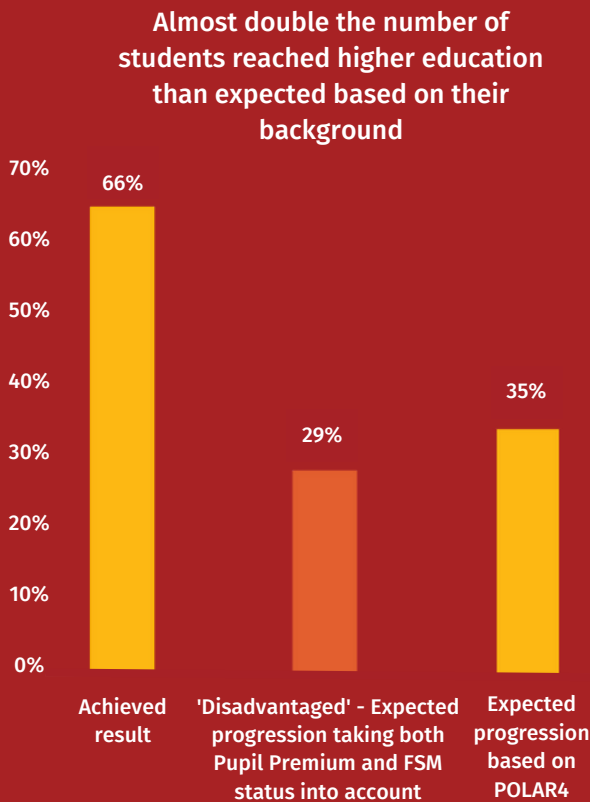


Impact Summary

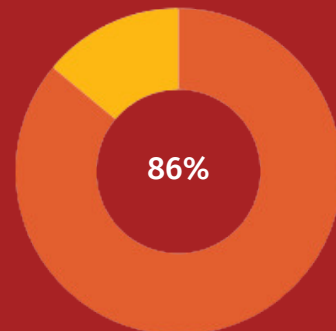
OVER THE LAST SIX YEARS WE HAVE WORKED WITH



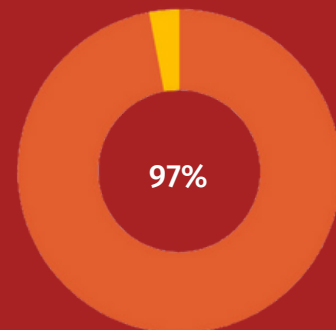
INCREASED SUCCESSFUL APPLICATIONS TO UNIVERSITY COMPARED TO A TAILORED BENCHMARK



We have contributed to improved GCSE attainment and understanding university.



Universify benefitted student attainment at GCSE



Participants agreed that the course gave them a better understanding of university

Significantly high applications to Oxbridge and the Russell Group universities

Foreword

As the Covid-19 crisis gave way to a cost of living crisis the challenges for many young people only increased. These challenges are to the ongoing detriment of their education and their futures. Another year of positive impact from the Universify programme for these same young people provides an opportunity for optimism.

It is encouraging that teachers continue to agree that Universify's programme benefits student GCSE attainment following the return to exams for the first time since the pandemic. The progress of Universify students to universities at a rate twice as high as students from similar backgrounds gives me confidence that our continued impact on GCSE attainment will contribute to more long-term success for future cohorts of students.

It is not just university access and GCSE attainment where we can see the impacts of Universify's work. Observing the first in-person summer residentials since the pandemic, I saw new, supportive friendships forged among young people who grew in independence and developed skills – like teamwork, communication, and leadership – that will be invaluable for future success.

In these challenging times the need for programmes like Universify is only growing. As the impact of the cost of living crisis makes hosting our programme challenging for some partners, we will explore hybrid in-person and online programmes that allow us to continue to grow our work. I am therefore also excited by Universify's plans for partnerships with new universities, other social mobility organisations, and businesses to meet that need so that we can not only expand our programme but maximise our long-term impact.

Finally, I am immensely grateful to the Universify team, volunteers, tutors, our university college host partners, and our lead teachers at partner schools who all make our programme possible. So, while we may be faced with another crisis, this year's impact and plans fill me with optimism to see the successes of future Universify students in the coming year.

Mary Nicholson, Chair of Trustees

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Executive Summary

INCREASING ACCESS TO TOP UNIVERSITIES FOR YOUNG PEOPLE FROM DISADVANTAGED BACKGROUNDS

CREATING A FAIRER SOCIETY THROUGH EDUCATIONAL EQUALITY

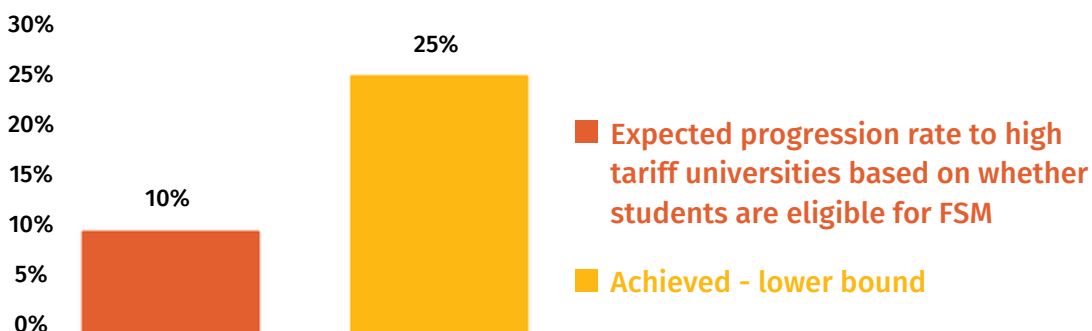
Universify Education is a charity which aims to reduce educational inequality. We support young people from backgrounds who are less likely to apply or consider applying to university – a decision which could drastically affect their future income, career and opportunities. Universify aims to equip young people with the skills, knowledge, and confidence to make successful applications to university, regardless of their background. In doing so, we aim to help these individuals break away from systemic cycles of poverty and inequality, which attaining highly academically and going to university can achieve.

Universify students progress to university at more than double the expected rate.

By aged 19, students who had participated in our programme:

- Were significantly more likely to apply to Oxbridge and to Russell Group universities according to UCAS.
- Progressed to high-tariff university at twice the rate of other students from similar backgrounds. [1]

Progression to High Tarriff HE by FSM status

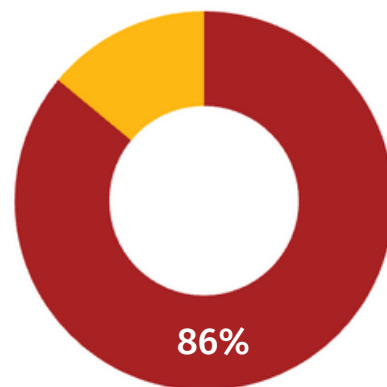


UNDERSTANDING OUR IMPACT

With a return to in-person delivery this year, we have focused on the direct impact of the programme on our students, considering how we contribute to increased aspirations and attainment as well as helping students to make an informed decision about whether to go to university:

- 85% of teachers agreed that their students were more likely to apply to university because of participating in the programme.
- 86% of teachers agree that taking part in Universify benefitted their students' attainment.

Universify benefitted student attainment at GCSE



[1] High-tariff universities are the top third of universities ranked according to their entry tariff points score by UCAS. They represent the universities which are most selective.

THE VALUE OF IN-PERSON AND ONLINE PROGRAMMES

In 2020 and 2021, our programmes enabled students to develop academic passions and make a better decision about whether to go to university despite being delivered online. [2] But a fundamental element of our programme has returned since delivering in person again: this summer, almost half of participants mentioned meeting new people or making friends as the best part of the course.

“The experience significantly helped my confidence, academically by showing me that I had the potential to get into a top university but also socially by building a network of peers who also had high ambitions which I stay in touch with and who continue to inspire me.”

Katende, Cohort 6 student (2022 Spring residential)

As Katende says, these networks of students, who share similar goals, ultimately continue to help each other succeed beyond the end of the programme.

A YEAR TO DEVELOP NEW WAYS OF CREATING IMPACT

In 2023 we aim to meet the growing need and demand for our work by developing ways to maximise our impact. Firstly, we want to expand the reach of our year-long programme by partnering with more universities to help them to fulfil the Office for Students’ new priority that universities must work with schools and organisations to increase attainment at GCSE. [3]

Secondly, we want to pilot a hybrid programme - combining the impact of our online and in-person programmes - so that we can support more young people alongside our flagship year-long programme. This hybrid programme will enhance our existing work by providing additional places where capacity is limited on our residential.

Finally, we want to maximise our long-term impact by creating a pipeline to Year 12 programmes, partnering with businesses to provide employability and educational opportunities, and develop additional long-term support for participants after the year-long programme.



[2] 2020 Impact report, 2021 Impact report - <https://www.universifyeducation.com/report>

[3] Office for Students, ‘Our approach to access and participation’ <https://www.officeforstudents.org.uk/advice-and-guidance/promoting-equal-opportunities/our-approach-to-access-and-participation/>. Article accessed 24th January 2023.

Who Are We?

WE BELIEVE IN EDUCATIONAL EQUALITY AND A SOCIETY WHERE EVERYONE HAS THE CHANCE TO FULFIL THEIR POTENTIAL, REGARDLESS OF THEIR BACKGROUND

WHY DO WE EXIST?

A young person's background often determines their educational outcomes, rather than their potential. Students from certain geographical, ethnic and economic backgrounds are less likely to apply successfully to highly-selective universities and high-demand courses. [4] These young people, therefore, miss out on the benefits university has to offer for professional and personal development, and the increased employment opportunities associated with it. [5]

The young people we work with face key barriers to higher education such as low aspirations, a limited understanding of higher education, lack of support and reliable information, and feeling out of place in the university environment. Low aspirations, confidence and motivation can impact students' attainment, meaning that they are less likely to achieve the high GCSE grades required to reach highly-selective universities and other future opportunities, and are at risk of falling short of their potential.

Underrepresentation in the country's top academic institutions limits social mobility and is to the detriment of everyone, as graduates disproportionately take up decision-making roles in society. Without graduates who are truly representative of our society, existing social inequalities are perpetuated.

Universify aims to empower young people to overcome these barriers through our annual programme.



[4] The Sutton Trust, 'Access to Advantage', 2018. <https://www.suttontrust.com/our-research/access-to-advantage-university-admissions/>. Article accessed 3rd February 2023.

[5] The Sutton Trust, 'Elitist Britain', 2019. <https://www.suttontrust.com/our-research/elitist-britain-2019/>. Article accessed 3rd February 2023.

What We Do

OUR INTENSIVE, TRANSFORMATIVE YEAR-LONG PROGRAMME

OUR PROGRAMME CONSISTS OF THREE ELEMENTS

We run a year-long programme to improve access to university by increasing students' aspirations, GCSE attainment and knowledge of higher education, helping them to challenge any belief they might have that university isn't for 'people like me'.

Our intensive, year-long programme is for students from non-selective state schools starting in the summer of Year 10 until the end of Year 11.

The programme has three main aspects:

- A week-long summer residential at a highly-selective university.
- Monthly 1-to-1 coaching with trained volunteers.
- A three-day GCSE revision weekend in the spring of Year 11.

WHAT MAKES US DIFFERENT

Universify works with students at this early stage, before they sit their GCSEs, to enable them to make more informed decisions about their futures and improve their chances of success if they apply to university. For many highly-selective universities and courses, higher grades at GCSE make applications more competitive. [6] Higher GCSE grades also open up additional pathways to other post-16 opportunities, affecting access to existing Year 12 outreach programmes, sixth form colleges, and certain careers. By intervening sooner to help raise aspirations and attainment, we provide more young people with the chance to fulfil their potential through education. Our programme combines the experience of university with individual ongoing support through coaching.

SUMMER PROGRAMME

The summer programme introduces participants to university through

- Academic taster sessions
- University Q&As
- Group project to design a dream university
- Confidence building and team games

MONTHLY COACHING SESSIONS

Monthly coaching sessions bridge the gap between our summer and spring residentials. Participants develop the goal-setting and problem-solving skills they need to pursue their chosen path.

SPRING PROGRAMME

Participants return in spring for

- GCSE revision classes
- Additional academic taster sessions
- Careers fair and post-16 programmes
- Self-reflection and group activities

[6] 'GCSE results do also help the admissions team whittle down applications to really competitive courses. If, for example, they need to choose between two applications, where predicted grades, personal statement and references are equally good, then the application with the slightly better GCSEs is more likely to receive an offer.' University College London, 'How important are your GCSEs when applying to UCL?' <https://www.ucl.ac.uk/culture-online/ask-expert/your-questions-answered/how-important-are-your-gcse-when-applying-ucl>. Article accessed 9th February 2023.

The residential trips to top UK universities provide participants with increased knowledge of university life and the admissions process, and the feeling of being ‘at home’ at university. They also allow participants to explore subjects beyond their GCSE syllabus, while improving their GCSE attainment and critical thinking skills. One-to-one coaching provides students with personalised ongoing support to sustain aspirations and develops the autonomy and self-esteem needed for young people to achieve their goals. Together, these elements equip participants with the skills, knowledge and belief to make and implement more informed decisions about their future, including overcoming the barriers to accessing higher education.

WHAT SUCCESS LOOKS LIKE FOR US

Success for Universify is achieved when a participant gains the knowledge and confidence to make an informed decision about their future as a result of experiencing the programme, as well as the qualifications and skills needed to pursue their aspirations.



HEAR FROM ONE OF OUR VOLUNTEERS



I find volunteering with Universify to be one of the most rewarding experiences I've undertaken – that is why I've volunteered for 3 years in a row!

Being able to assist the students in building their confidence and knowledge around university is one of the main reasons I enjoy it so much. Students tend to arrive with us nervous about attending University in the future and often believing that University is not for them. When they leave, they know that they are absolutely the type of students that would flourish in higher education. By giving the students a safe space to explore their future, we get to see them start to believe in themselves and their peers, building friendships and connections that will last a lifetime and that is a wonder to witness.

As a volunteer, I have gained a multitude of skills that have carried over into my student and professional life. I now work in widening access at a Scottish University because I fell in love with showing young people that they can achieve their dreams. It gave me the relevant experience and skills to secure a job I love before finishing my master's degree.

Niamh, Course Director



Who We Support

WE WORK WITH STUDENTS WHO ARE UNDERREPRESENTED AT HIGHLY-SELECTIVE UNIVERSITIES

COHORT 6 AND 7

In 2022, the 182 participants from Cohort 6 rejoined us for their spring residential. In August 2022 we also welcomed our seventh cohort of 165 participants at the summer residential.

PRE-GCSE AGE

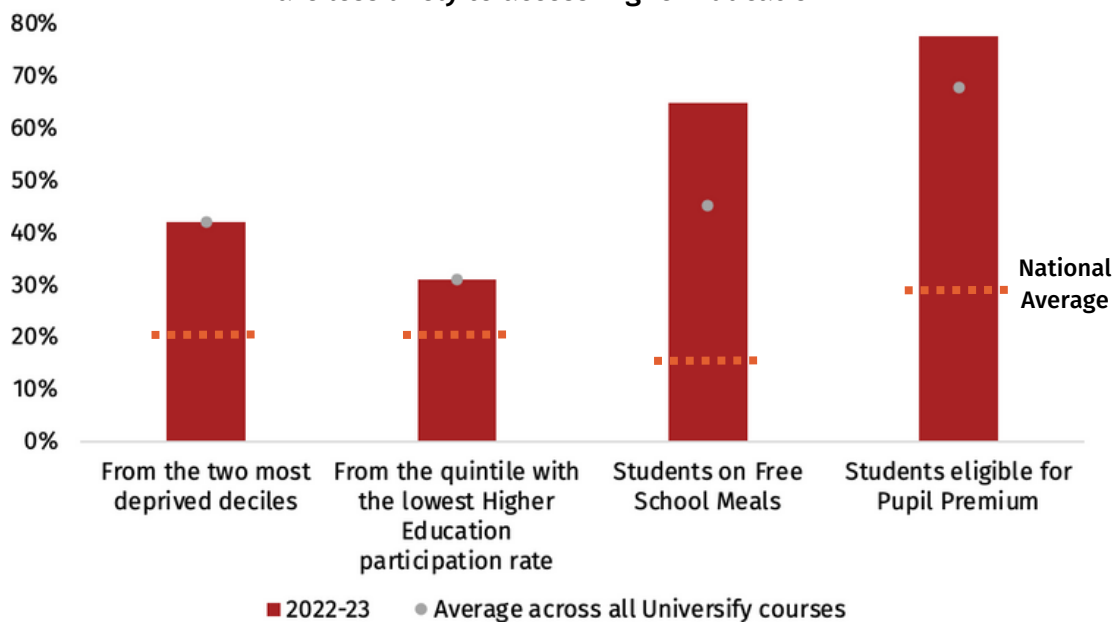
Our participants begin the programme aged 14-15 in the summer before Year 11, which is earlier than most university outreach programmes. This allows us to help young people at risk of underachieving at GCSE which would limit access to university, careers and other programmes.

FROM UNDERREPRESENTED BACKGROUNDS

We work with participants whose backgrounds are underrepresented at highly-selective universities to address the systemic inequalities these students face.

We select participants from low socioeconomic backgrounds, using Free School Meals as a proxy to identify low family income. [7] Students receiving Free School Meals (FSM) are half as likely to progress to university than students not receiving FSM, a gap which has remained significantly large in the past decade. [8] In Cohort 7, 65% of our participants were eligible for FSM and 78% received Pupil Premium. [9]

The backgrounds of our participants show they are less likely to access Higher Education



[7] FSM is a means-tested benefit that can indicate a student comes from a low-income family.

[8] UCAS End of Cycle data 2022 <https://www.ucas.com/data-and-analysis/undergraduate-statistics-and-reports/ucas-undergraduate-sector-level-end-cycle-data-resources-2022>. Article accessed December 2022.

[9] Pupil Premium includes young people who are or have been eligible for FSM in the past 6 years, care-experienced young people and young people who are looked after by the local authority. <https://www.gov.uk/government/publications/pupil-premium/pupil-premium>.

Additionally, we prioritise applicants who would be the first generation in their family to attend university. Evidence shows that young people's aspirations, knowledge of the system and how to apply to university can be limited when they have no family members who have been to university. [10] Over 80% of Cohort 7 would be the first in their family to go to university.

HOLISTIC APPROACH

As well as considering applicants' socioeconomic background, we also consider more holistic assessments of disadvantage which could impact an individual's likelihood of fulfilling their potential and reaching university.

Teachers are asked to outline other challenges applicants may face, including being a young carer or care-experienced (Looked After Children) and other personal circumstances.

Many of our participants also face geographical barriers to accessing opportunities in education. [11] Over half of Cohort 7 (55%) came from areas with postcodes in the three most deprived deciles, according to the Index of Multiple Deprivation (IMD). When considering geographical participation in higher education, 31% of participants came from areas with the lowest participation rates in higher education (POLAR).



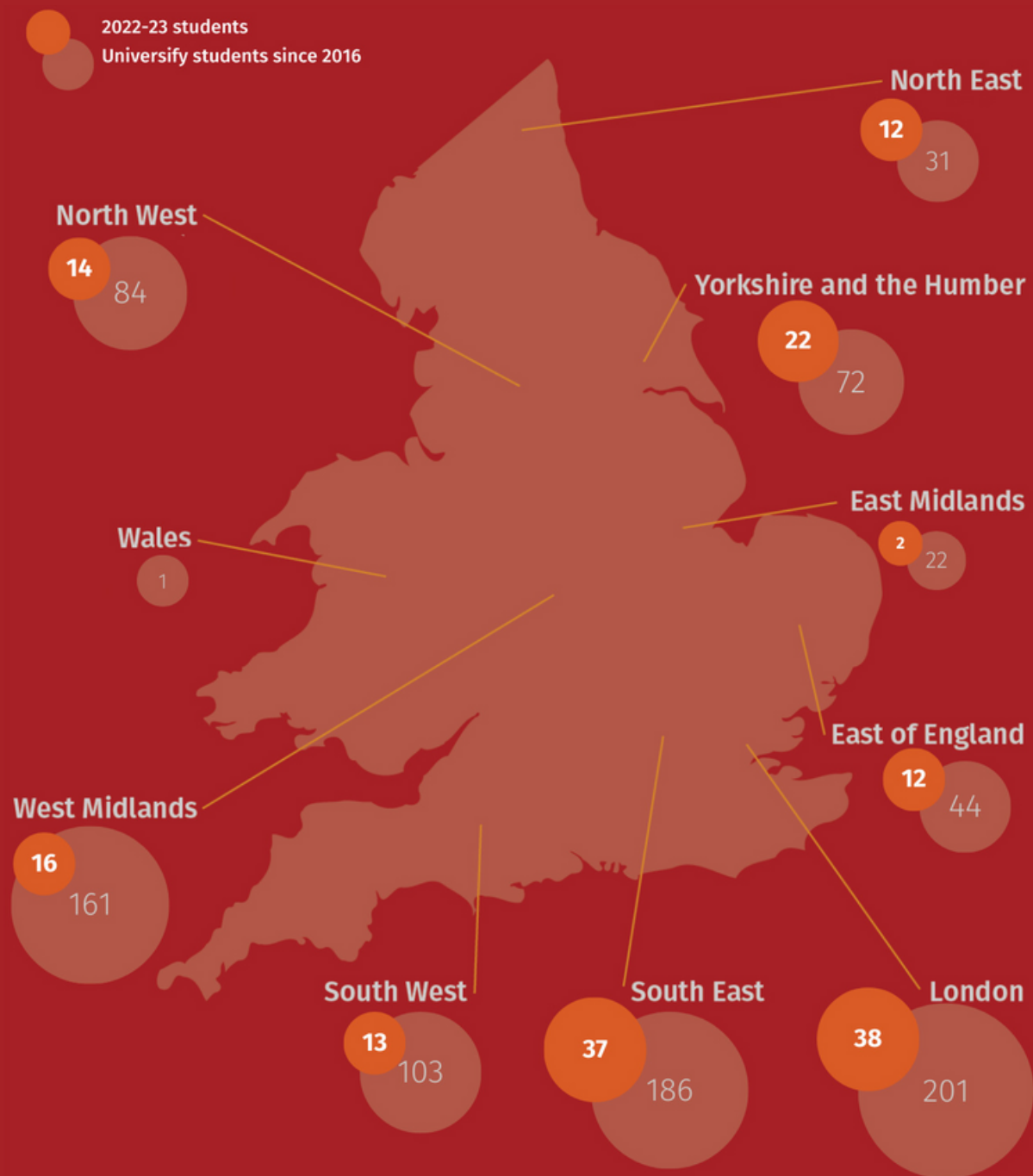
Over 80% of Cohort 7 would be the first in their family to go to university.

Over 55% of Cohort 7 came from areas with postcodes in the three most deprived deciles.

[10] CFE Research for the Department for Business, Innovation and Skills, Understanding progression into higher education for disadvantaged and under-represented groups, p13 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/474269/BIS-15-462-understanding-progression-into-higher-education-final.pdf Article accessed 3rd February 2023.

[11] Young people on FSM from the highest participation neighbourhoods are over twice as likely to enter higher education than those from the lowest participation neighbourhoods. <https://www.officeforstudents.org.uk/news-blog-and-events/blog/tackling-the-geographical-disparities-in-higher-education>.

Our Participants



Initially, schools are selected from the priority areas of our partner colleges in Oxford and Cambridge. For Somerville College these are Hounslow, Buckinghamshire, the West Midlands, and Staffordshire.

For St Hugh's College, it is Kent, Bexley, Bromley, and Greenwich; for Jesus College, they are Lambeth and Wandsworth; and for St Catharine's College, it is North Yorkshire and Suffolk.

Underlying Educational Equality

UNDERSTANDING THE CONTEXT FOR THE IMPACT WE AIM TO CREATE: EDUCATIONAL INEQUALITY AND ITS LINK TO LIFE OUTCOMES

As with many interventions, Universify aims to create individual change while operating within a societal system of entrenched inequality. It is important to understand the systemic factors which affect our students and how, by focusing on creating small but important changes at a crucial stage of education, Universify helps individuals break out of negative systemic cycles. These small changes are the measurements we prioritise to evaluate how our programme creates positive individual change, before ultimately reducing the systemic inequalities and underrepresentation at play. This section explains the context for the impact we aim to create.

Social Determinants of Health (SDH) are 'the non-medical factors that influence health outcomes' which impact on our lives. [12] Education is one such Social Determinant of Health. It is well established that the potential impacts education can have on a person's life are linked to improved health, wealth and increased happiness.

The 2022 IFS report, 'The UK education systems preserve inequality,' also suggests it should be a way out of poverty for young people who are from deprived backgrounds. [13]

Recent findings from the 2019 Deaton Review reports that children in the UK from the poorest and most disadvantaged backgrounds have worse outcomes throughout their education and indeed, in England it is reported that this is the case at every stage of their school lives. [14][15]



DIFFERENCES IN GCSE ATTAINMENT FOR THOSE FROM LOW SOCIOECONOMIC BACKGROUNDS

There is a significant gap in attaining good Maths and English GCSEs for those who are eligible for FSM and those who do not qualify.

[12] World Health Organization, 'Social Determinants of Health', n.d. <<https://www.who.int/health-topics/social-determinants-of-health>> [accessed 7 January 2023].

[13] Tahir, I., 'The UK Education System Preserves Inequality', Institute for Fiscal Studies, 2022 <<https://ifs.org.uk/articles/uk-education-system-preserves-inequality-new-report>> [accessed 8 January 2023].

[14] Tahir, I., 'The UK Education System Preserves Inequality', Institute for Fiscal Studies, 2022 <<https://ifs.org.uk/articles/uk-education-system-preserves-inequality-new-report>> [accessed 8 January 2023].

[15] Over recent decades, socio-economic status (SES) has been used as a proxy (way) of assessing educational attainment. One such proxy is free school meals which has subsequently become a proxy used as a mechanism for school funding and as a proxy linked to educational attainment. Tahir, 'The UK Education System Preserves Inequality'. This additional funding scheme was initiated in 2011, through the Pupil Premium. This meant for every pupil eligible for free school meals the school received additional funding. In 2015-2016 this equated to £1320 for every FSM pupil (primary schools) and for those in England £935 and for Wales, £1050 for those eligible for free school meals in secondary schools. Tahir, I., 'The UK Education System Preserves Inequality', Institute for Fiscal Studies, 2022 <<https://ifs.org.uk/articles/uk-education-system-preserves-inequality-new-report>> [accessed 8 January 2023].

Approximately 40% of students eligible for FSM attain good Maths and English at GSCE versus nearly 70% of all other pupils.

Approximately 35% of students eligible for FSM have two or more A levels at age 19 compared to 60% for all other pupils.

*Snapshot of the GCSE/A Level and FSM attainment Gap (as of 2019, reported in 2022)
Adapted from the UK Education System Preserves Inequity – New Report, 2022*

Other datasets show a large, but less marked, difference at other stages. At aged five, approximately 55% of pupils eligible for FSM reached a good level of development compared to approximately 73% of all other pupils.

BARRIERS TO EDUCATION

There are a number of recognised and well documented barriers to education which in particular affect and negatively impact young people who come from poorer backgrounds. [16] In an educational context social mobility is referred to as, 'providing or facilitating equal opportunities to succeed academically...regardless of their socio-economic background.' [17]

Factors that create these barriers include geographical areas in particular, where social mobility may not be as accelerated.

Understanding the cumulative impacts of poverty, it is important to recognise they can have such an impact on students' 'educational outcomes health and personal well-being.' [18] Within the picture of barriers for this demographic group, affordability and the associated cost of attending university is a significant barrier and concern, and encompasses a number of elements which impact on the equal opportunity to succeed. [19]

The Universify programme aims to address some of these barriers in particular the geographical reach, and social mobility by offering a range of experiences and a positive and safe environment which sets them up to succeed and have newfound aspirations and increased self-efficacy. Self-efficacy is seen as a person's own belief in their ability to attain their own goals.

It is not uncommon for this age group to have the beliefs that they have little to no control over their lives and, for some young people, difficult life events can lead to lower aspirations and potentially result in a reduced commitment to their studies. [20] Work by Durrington Research School gave insight into self-efficacy and how it can be directly related to disadvantaged young people. They note that self-efficacy can change in an instant, between lessons for example, so can be difficult to capture a full picture. What the Universify programme does is offer the experience that will support the building of self-belief and confidence. [21]

[16] Forsyth, A., and Furlong, A., 'Access to Higher Education and Disadvantaged Young People', British Educational Research Journal, 29/2 (2003), 205–25.

[17] Burges Salmon, 'Social Mobility and Education' <<https://www.burges-salmon.com/about-us/community/social-mobility-and-education>> [accessed 12 January 2023].

[18] Tierney, S., 'Developing Confidence, Self-Esteem and Self-Awareness in Disadvantaged Students', Humanutopia, 2019 <<https://www.humanutopia.com/guest-articles/developing-confidence-self-esteem-and-self-awareness-in-disadvantaged-students/>> [accessed 19 January 2023].

[19] Such costs include accommodation and living costs, as well as the cost of tuition fees. McCabe, C, et al., 'Barriers and Facilitators to University Access in Disadvantaged UK Adolescents by Ethnicity: A Qualitative Study', Journal of Further and Higher Education, 46/10 (2022), 1434–46.

[20] Tierney, S., 'Developing Confidence, Self-Esteem and Self-Awareness in Disadvantaged Students', Humanutopia, 2019 <<https://www.humanutopia.com/guest-articles/developing-confidence-self-esteem-and-self-awareness-in-disadvantaged-students/>> [accessed 19 January 2023]. [21] Runeckles, C., 'Educational Disadvantage and Self-Efficacy', Durrington Research School, 2022 <<https://researchschool.org.uk/durrington/news/educational-disadvantage-and-self-efficacy>> [accessed 19 January 2023].

[21] Runeckles, C., 'Educational Disadvantage and Self-Efficacy', Durrington Research School, 2022 <<https://researchschool.org.uk/durrington/news/educational-disadvantage-and-self-efficacy>> [accessed 19 January 2023].

Our Impact

OUR PROGRAMME INCREASES STUDENTS’ ASPIRATIONS, GCSE ATTAINMENT AND KNOWLEDGE OF HIGHER EDUCATION, HELPING THEM TO OVERCOME THE POSSIBLE BELIEF THAT UNIVERSITY ISN’T FOR ‘PEOPLE LIKE ME’

This report presents the impacts from two Cohorts – 6 and 7 – and focuses on the three main barriers that the Universify programme concentrates on supporting students to overcome:

- **Low educational aspiration**
- **Low educational attainment**
- **Low self-belief, leading to the assumption that university is not a place for ‘people like them.’**

By overcoming these three barriers, we aim to put students in a good position to make an informed decision about their future pathway, including whether they apply to university.

For Cohort 6 there were 182 students who took part in the programme and in Cohort 7 there are 165 students. For Cohort 3, who applied to university from 2021 onwards, there were 122 students.



Universify is a wonderfully supportive programme, which encourages and coaches students to maximise their abilities. The Universify programme has allowed our students to grow in confidence and experience university life via the residentials. In particular, Maggie has been able to ask her teachers for support and found the residential to be an excellent opportunity and she is looking forward to the Easter residential weekend.

I would recommend Universify as a supportive and sustained programme for GCSE students who may not consider higher education.

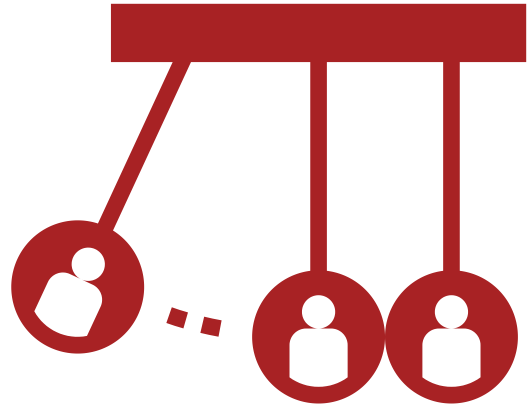
**Jordanna Riches, Lead Teacher,
The Bicester School**



1 Increased access to university and increased aspirations: changing students' knowledge and perceptions of university to impact whether they apply to university.

Students apply to university at significantly high rates after taking part in the programme.

Students begin applying to university three years after they take part in the Universify programme. We track our students' applications to university at aged 19 to see whether students' participation in our programme leads to an increased number of applications to universities. [22]



Cohort 3 began their Universify programme in 2018. The majority entered university in September 2021, with an additional 13% beginning university in September 2022.

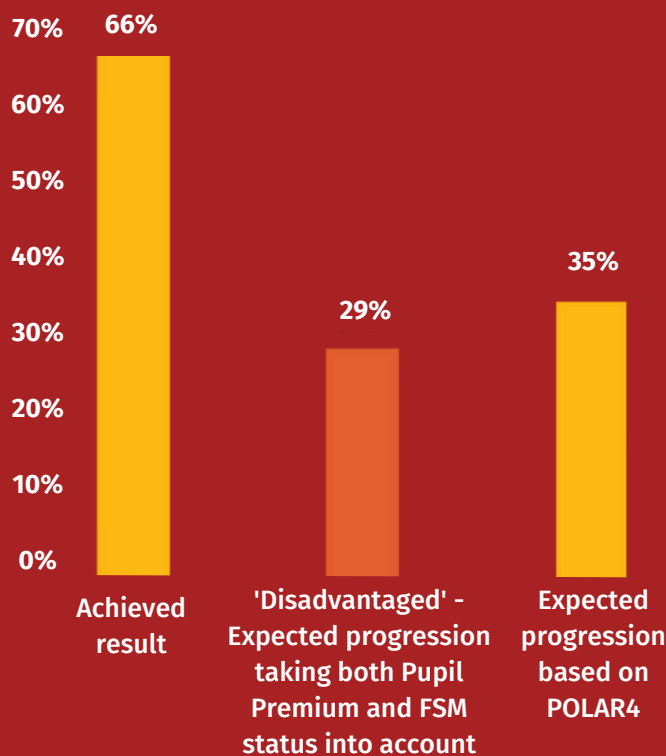


Very significantly high applications to Oxbridge and the Russell Group universities.

Data from UCAS shows that 78% of Cohort 3 applied to university, which, statistically speaking, is very significantly high compared with UCAS' benchmark of similar applicants (78% vs 60%). This was particularly marked for high- and medium-tariff universities – universities with the highest entry requirements which are associated with greater social mobility. In particular, applications to Oxbridge were statistically very significantly high, which we believe our programme, hosted at Oxford and Cambridge, contributes to.

[22] We have updated our methodology this year to track university destinations at age 19, rather than age 18 as in our previous reports. This helps us capture data about students who choose to take a gap year before applying to university, which amounted to 15% of those who applied to university for Cohort 3.

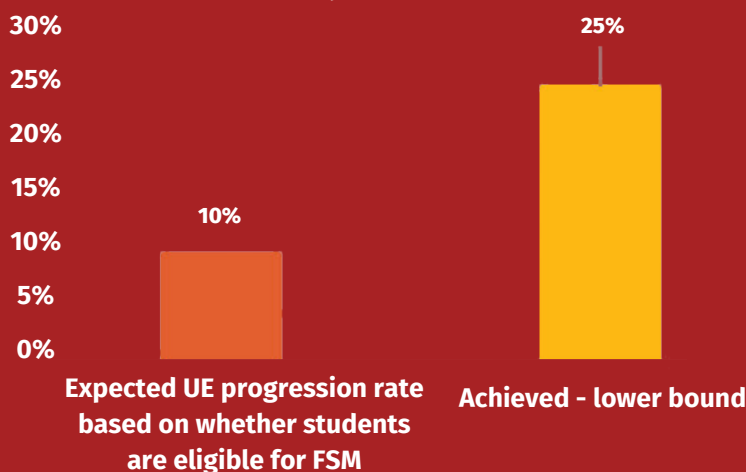
% of students expected to reach higher education based on background



We can compare Cohort 3's progression to university with national rates of progression. Overall, 66% of Cohort 3 reached higher education. [23] Compared with a benchmark assessing 'disadvantage' (FSM and pupil premium metrics), Cohort 3 progressed to university at a rate two times higher than expected (66% vs 29%), and almost double the rate based on geographical metrics (POLAR4 35%). [24]

Almost double the number of students reached higher education than expected based on their background.

Progression to High Tariff HE by FSM status



When we assess Cohort 3's entry to high-tariff universities, more than double the number of students reached a high-tariff university compared with national averages when considering FSM eligibility (25% vs an expected 10%). [25]

Our students' long-term data indicates that they are reaching university at higher rates than expected despite the barriers which they face and may point to the University programme helping them to overcome these barriers.

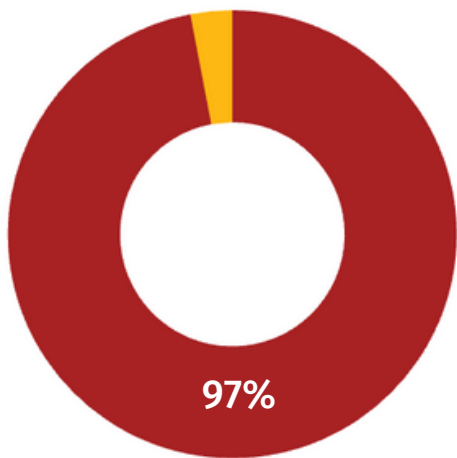
[23] UCAS rounds their data to the nearest 5 to protect student anonymity. Our figures are therefore estimates, and represent the lower bound of this estimation, meaning that an even greater percentage of students may have reached than we have reported university.

[24] We chose to use two benchmarks to account for the variety of indicators which impact progression to Higher Education. For our tailored disadvantage benchmark, we used two national data sets to work out our participants' expected progression rate based on their socio-economic disadvantage criteria in Year 10. We used data from UCAS' End of Cycle report for progression rates for those eligible for FSM. We used data from the Department for Education for progression rates for those who received Pupil Premium. For our second benchmark, we looked at participants' likelihood of reaching university based on the progression rates to university in the area they lived in (POLAR4). We have used data from UCAS' End of Cycle report 2022 to calculate this benchmark.

[25] High-tariff universities are the top third of universities ranked according to their entry tariff points score by UCAS. They represent the universities which are most selective.

INCREASED ASPIRATIONS TO UNIVERSITY DURING THE PROGRAMME

Our programme gives students a greater understanding of what university can offer them. Through the summer and spring residentials, we challenge misconceptions that university is 'not for people like me' and students see that university is attainable. This section considers both cohorts from different stages of their programmes and looks at long-term university destinations data.



97% of participants agreed that the course gave them a better understanding of university



INCREASED POSITIVE ASSOCIATIONS WITH UNIVERSITY TO ENABLE A GREATER LIKELIHOOD OF APPLYING

Students were asked what one word they associated with the idea of studying at university both pre- and post summer. The biggest increase was the change in the number of students who thought university would be fun, with an increase of 25 uses of the word 'fun', or a similar word ('exhilarating', 'cool beans', 'sick' and 'exciting'), up from just two uses before the summer. In addition, a new theme of words associated with 'independence' emerged after the summer course. Other words used included 'interesting' and words associated with determination, passion and education.



In contrast, the number of students who referred to university using words associated with it being ‘hard’ or ‘hard work’ remained consistent across the summer. There was a small change post course (increase of four) in the associated words referring to university being smart/intelligent, which could show a positive attitude to an improved self-belief. These were the second and third highest word associations across the survey both pre- and post summer.

The single most positive change was the number of students who associated studying at university with ‘fun’. It shows that students attending appear to have experienced a particularly positive time during the summer residential which helps students feel that university is place they can choose to be a part of.

This was mapped by adopting survey structures used in the DofE's Longitudinal Study of Young People in England. [26] The measure looks at whether students change their mind about statements like ‘People like me don’t go to university’. This summer’s statistically significant increase in aspirations indicates that the in-person residential is very likely to have contributed to our students changing their minds to feel that they want to go to, and do belong at, university.

STUDENTS REPORT THAT THEY ARE MORE LIKELY TO APPLY TO UNIVERSITY

Cohort 7 students were asked in a pre- and post-course survey whether they were likely to apply to a highly-selective university pre- and post-summer when they attended in person in August 2022. The results indicate there is a very positive response to the summer school regarding applying to highly-selective universities, shown by a combined change from 61% (pre-course) opting for ‘very likely’ and ‘fairly likely’ to apply, to 77% post course with a combined increase of 16% points. Overall, 32% of students answered this question more positively after the Universify course. In particular, four students went from saying they were ‘not very likely’ to apply to university to being ‘fairly likely’ after the course.

In total, 49% of students changed their mind about whether they were likely to apply to university. The most noticeable change was in those students who started the summer saying that it ‘depends’ whether they would apply to a highly-selective university, which accounted for 31% of students.

“
Universify was a course I had no knowledge of before being put forward to apply by my school, but this is something I am immensely grateful for as the course enabled me to think more widely about my future academic prospects and become excited about the possibility of going to university and enriching my ambitions.
Amy B - Student
 ”

SIGNIFICANT CHANGES TO STUDENTS' ASPIRATIONS TO EDUCATION

In 2022, for the first time, we saw a statistically significant increase in students' aspirations to education before and after the in-person summer residential.

[26] Our survey includes the Department for Education’s Longitudinal Study of Young People in England (LSYPE) survey’s five-question Educational Aspirations module and the one-question University and Higher Education module to measure whether there is a change to educational aspirations.

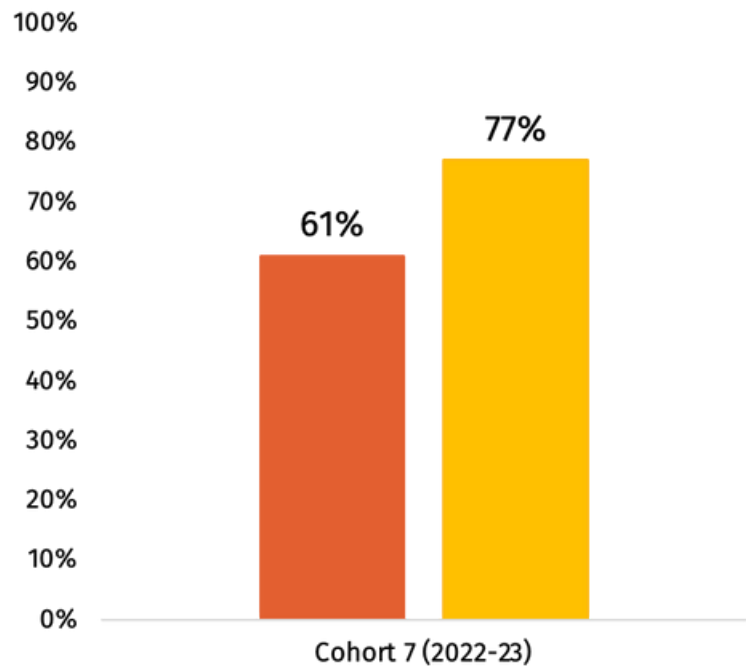
By the end of the summer course, 74% of students who had opted for the ‘depends’ category had reconsidered, which is significant as it shows that students had been able to reflect on whether they wanted to apply to university after experiencing the summer residential. Overall, 34 students changed their minds to feel they could apply to a highly selective university with eight students changing their minds from ‘depends’ to ‘very likely’ and 22 students changing their minds from ‘depends’ to ‘fairly likely’. Eleven students showed a change of thinking, opting for ‘not very likely’ to apply to a highly selective university after the summer residential.

This indicates that students have gained the confidence to consider their futures along with a clearer understanding of university and are able to change their minds.

For Cohort 6, who have completed the year-long programme, aspirations to university in the medium-term increased drastically from the start of the programme in August 2021 to the Spring residential in April 2022. This saw a 25%-point change from before summer to after the spring residential of combined, ‘fairly likely’ and ‘very likely,’ to apply to a highly selective university.



Participants were more likely to apply to University after completing the summer programme



- Percentage of students likely to apply before summer residential
- Percentage of students likely to apply after summer residential

The following student testimonials show how the programme impacted whether Cohort 6 students would apply to university.

“
Before Universify, I was at a small school where university seemed so far away and I was unsure of what to do or how to take the next big step. However, looking back on my experience now I can confidently say that I have a new outlook and that path is far more accessible than I had previously realised.
Harriet - Student
 ”

“ Then...

I took part in the Universify programme as part of the 2021/2 cohort, the programme consolidated my want to attend university and to aim higher for what type of school I wanted to attend to achieve hopefully getting into a top university. The experience significantly helped my confidence, academically by showing me that I had the potential to get into a top university but also socially by building a network of peers who also had high ambitions which I stay in touch with and who continue to inspire me. Universify was one of the first times I felt seen as a real academic which drastically helped me going into GCSEs. Most distinctly, the subject sessions offered as part of the programme helped me realise about really interesting courses that I wouldn't have a clue about without Universify, which in turn impacted my IB choices. After completing the Universify programme I found that what had been a personal interest in Politics was something I wished to place a much stronger focus on. This inspired me to apply to the United World Colleges whose aim is 'a global movement that makes education a force to unite people, nations and cultures for peace and a sustainable future.'

Now...

I am now studying the International Baccalaureate at Lester.B Pearson United World College, one of the top international schools in Canada and know that in part, I owe this to the influence of the Universify programme impacting my goals and achievements.



2 Increased attainment: students gain the grades to apply to higher education and other future opportunities

Low educational aspirations and motivation, as well as insufficient support to overcome individual challenges, can lead to low attainment, closing off options to young people at the age of 16. By providing support through 1-to-1 coaching and improving aspirations to education (see previous section), our programme has had an impressive positive influence. We have seen improvements in the students' attained GCSEs indicating raising students' aspirations and motivating them, with some achieving notable improvement on their teacher predicated grades. For this impact, the majority of the data is gathered from teacher surveys focused on Cohort 6.

THE UNIVERSIFY PROGRAMME BENEFITS GCSE ATTAINMENT

Overall, 74% of students did better or attained their predicated grades, of which 30% improved on their predicted grades and 44% achieved their predicted grades. This includes a marked increase at grade 9, the highest grade, with an increase of 97 counts compared to their predicted grades. For the 26% who did not achieve their predicated grades, 60% of teachers strongly agreed or agreed that engaging in Universify's programme still benefited the student's GCSE attainment.

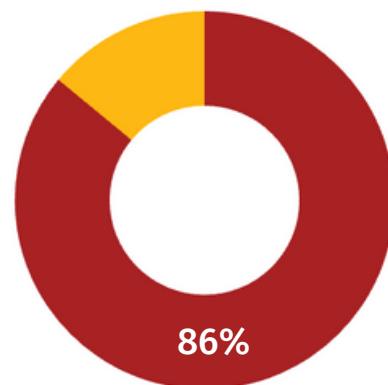
There has been a downward trend in attainment over the last three cohorts, from 91% of Cohort 4 (2020) attaining or doing better than their predicted grades, to 83% of Cohort 5 (2021), to 74% of Cohort 6 (2022).

It is worth noting that there are likely reasons based on the impacts from the pandemic as seen in analysis of learning loss and widening inequalities due to Covid-19 school closures. [27] Cohort 6 are the students who started their GCSE journey in Year 9 based much online and remotely. This cohort also is the first cohort to be assessed by examination since before the pandemic, as opposed to the previous two cohorts where the assessment was different due to Covid (teacher-assessed grades (2021) and centre-assessed grades (2020)).

Despite this, teachers stated that they either agreed or strongly agreed that 86% of students had benefitted from being involved in the Universify programme.

Coaching is an important part of the programme to support students to build on their academic goals in the run up to their GCSEs. From the student's perspective 77% stated they either strongly agree or agree that the coaching has helped towards their academic goals.

Universify benefitted student attainment at GCSE



[27] Jenna Julius, 'GCSE data reveals Covid's impact on disadvantaged schools'. <https://www.nfer.ac.uk/news-events/nfer-blogs/gcse-data-reveals-covid-s-impact-on-disadvantaged-schools/> Article accessed 3rd February 2023.

“
 The coaching was incredibly helpful, allowing me to ask questions to someone who had the experience to answer, and there was strong support for my GCSE’s – they helped me set goals to work on such as creating a timetable for revision. I was also able to develop my confidence in public speaking, and with this help I achieved a scholarship to my current college.
 ”
Harriet - Student

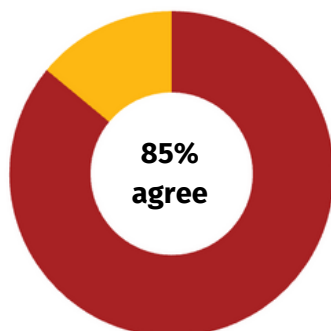
STUDENTS ARE IN A GOOD POSITION TO APPLY TO UNIVERSITY

Following students’ GCSE results in August 2022, we surveyed teachers about how the programme has affected their students.

Teachers strongly agreed or agreed that 69% of students were in a good position to apply for a highly-selective university. For the 15 students (8%) where teachers did not think students were in a good position to apply, they still stated that taking part in the programme had benefitted attainment for 64% of students.

85% of teachers also ‘agree’ or ‘strongly agree’ that students are more likely to apply to a highly selective university after completing the year-long programme.

Students are more likely to apply to a highly-selective university after completing the year-long programme



3 Increased skills and self-belief to consider future pathways

We work with students in Year 10 to help build their confidence to achieve their potential at GCSE level and to ensure that decisions about their futures are not hampered by low self-belief, whether due to a lack of opportunities or role models. This section shows how students’ experience of the programme impacted their confidence and ability to make decisions for their futures.

IMPROVED COMMUNICATION SKILLS AND RESPONSES TO CHALLENGES

Each student is offered up to 10 coaching sessions over the period of the programme. The purpose of these sessions is to encourage participants to become proactive and independent, by developing the goal-setting and problem-solving skills that they will need to pursue their chosen path beyond Universify.

Volunteer coaches are asked to measure three outcomes:

- 1 Communication**
- 2 Attitude**
- 3 Students’ response to challenges**

For Cohort 6, the three measures were examined in two different ways. Firstly, those students who had engaged and received 10 or more coaching sessions and secondly, those who had engaged in five or more coaching sessions. For the first group, the results indicate an increase in scores for communication along with an increase in response to challenges, and a slight decrease in scores for attitude.

The second group showed an increase across all three measures. This would show that the coaching overall is having a positive impact in helping students build skills to pursue their future pathway.

QUALITATIVE CONTRIBUTIONS TO STUDENTS' SELF-EFFICACY

While we saw a medium effect to our students' scores of self-efficacy, these were not statistically significant which may be caused by the small sample size. [28] Instead, we can see qualitative change in students through their testimonies.

The following list shows some notable words, phrases and excerpts from students' testimonials from Cohort 6, highlighting how much being part of the programme has offered support from illustrating what they can get out of attending university on all aspects, from living away from home, gaining independence, having the confidence to face their own negative perceptions and fears so they can achieve their newfound goals as well as new life skills.



- **Previously isolated academically from peers.**
- **Walked away with grades I am proud of.**
- **Learnt more about myself and my aspirations.**
- **Learnt not to limit my options and open my mind.**
- **Coach talked through many barriers and guided me through year 11 with more organisation.**
- **Alleviated anxiety.**
- **Helped me realise that university was a place for people like me.**
- **Despite Covid, the week of online activities was unforgettable and showed me subjects which I had never seen - it introduced me to Art History which I now do for A-level!**
- **I especially enjoyed trying out my own dorm room and the independence that came with it.**
- **Residential trip was the favourite part of the course.**
- **Amazing adventures like punting and going to an ice-cream parlour.**



[28] We measure our impact using robust statistical test wherever possible. However, we acknowledge that our small sample size can mask noteworthy changes and are mindful of reporting on these data even when statistical significance is not reached. As seen in further research, "underpowered studies should be interpreted cautiously and the 'absence of evidence' in these studies should not be taken as 'evidence of absence'." From Barun Kumar Nayak , 'Understanding the relevance of sample size calculation',<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2993974/>. Article accessed 3rd February 2023.

The following student testimonials show the positive impact the programme has had on their own self-belief that they not only can apply to university, but a highly-selective university. They have gained confidence in themselves and embraced the experience, which appears to have given them some control over the decisions they make for their educational journey.

“

Before Universify I did not have much self-belief academically. I did not know much about university life or how to learn in a way that suited me and I was very unsure of myself. Universify really helped me realise that university was a place for people like me. I am dyslexic and come from a non-academic background, but through Universify I have gained confidence socially and academically. Universify has given me invaluable advice, self-confidence and friendships. I am very grateful and I hope to apply to a university course I wouldn't have even thought about before Universify.

Jess



As a student fascinated with performing arts, I had always felt estranged from my peers because I seemed to lack the type of confidence that they had. I often shied away from new things and hardly ever believed in myself or my choices. I was always stressed and tired about school, however, this all began to change when I started my journey at Universify.

During my time on the course, I had learned so many new things about myself and how to handle certain situations. Firstly, my coaching sessions were super helpful, they had helped me realise that even if I did not achieve the grades that I had wanted at GCSE, I would still be able to take the A-levels that I wanted. For me, this was a major eye-opener and managed to take a great deal of stress off my shoulders.

Melody

”



Volunteer Testimonial

The following testimonial also shows the positive impact the programme has had according to the volunteers who are directly involved with the programme. The Universify programme provides a wide range of activities and experiences whilst navigating and addressing the inequalities within the educational system.

“

As the product of widening participation and access programs myself, Universify is doing an indispensable job in helping young people not only to develop skills that will help them for years to come in their GCSEs and beyond, but also to have the confidence and drive to think constructively about their goals and know their worth. The education system in the UK isn't perfect and Universify is doing its part in promoting a fairer world; where everyone has an equal chance to achieve their potential, regardless of what background they come from.

I think one of the great strengths of the course is the mix of activities the students receive: from academic sessions delivered by professionals in their field and one-on-one coaching; to museum trips; to fun activities and teamworking challenges organised by the volunteers. By the end of the summer course they've met new people, had new experiences, and made friends for life- all while learning about higher education in a safe and open environment. Being a Group Leader on the course, I have learned a lot of skills that I will take forward with me as I continue my degree and my work in access with the university, which Universify was my first introduction to.

Alex Lowrie, Group Leader, St Hugh's programme

”



Reviewing Our Programme Activities in 2022

In 2022, Universify returned to delivering residential summer programmes drawing inspiration from previous residential programmes and our recent experience of curating and adapting online timetables. The response from participants and volunteers remained very positive, with 98% of participants and 100% of volunteers agreeing or strongly agreeing that they enjoyed the course.

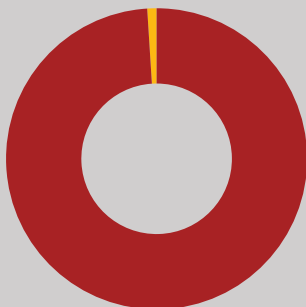
Participants revelled in the social aspect of a residential course with 46% of participants saying that meeting new people/making friends was the best part of the course, a notable increase from 33% of participants last year. Activities in our residential timetable such as going punting and exploring the city during the scavenger hunt were extremely popular with 63% of participants listing them as their favourite activity on the course.

This is not to imply that the academic work was a lesser part of the course with 92% of participants agreed that there was a good balance between academic work and activities. Feedback for the academic sessions remained consistent with previous in-person courses, with 28% of participants mentioning academic sessions as their favourite activity of the week, or the best part of the course. As our network of academic tutors grows, we continue to encourage tutors to return to teach with us with the confidence that their prior experience with Universify will provide high quality academic sessions.



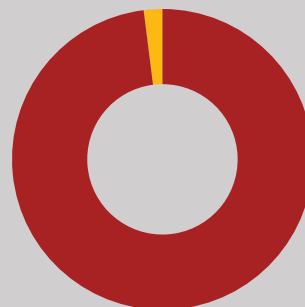
99%

of participants agreed that staff were friendly and helpful



98%

of participants agreed or strongly agreed that they enjoyed the course

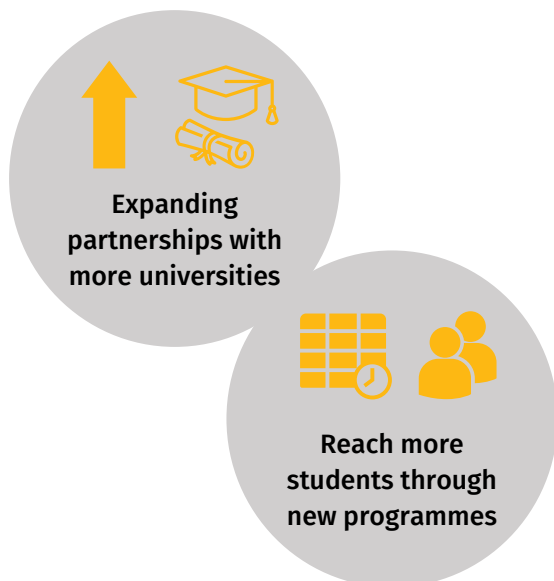


Our Future Plans

In 2023 we want to take advantage of the operational and financial stability we achieved in 2022 to maximise our impact. In particular, we want to address the growing need for more effective support for students whose education - and future opportunities - have been so severely impacted by the pandemic. [29] Our plan has three goals not only to increase the number of students we work with but also to maximise the impact of that work.

Tackle low GCSE attainment by expanding our year-long programme in partnership with more universities

One of the Office for Students' 5 new priorities is for universities to partner with schools and organisations to raise the attainment of young people. [30] With 6 years of consistent impact on GCSE attainment, we want to support universities to fulfil this priority through partnership. We aim to partner with additional universities to help them tackle one of the major barriers to university while expanding the number – and geographical range – of Universify students.



Grow our impact and meet increased demand by reaching more students through new programmes

Developing partnerships to host our year-long programme takes time. We want to meet the growing need for our work now by providing an additional, impactful programme that we can launch sooner alongside our flagship year-long programme. Therefore, with excellent feedback from our online programmes delivered during the pandemic, we aim to pilot a hybrid programme, combining online academic sessions with workshops at universities. [31] This new programme will also allow us to work with students who require the greater flexibility of online learning, such as young carers, while still maintaining the benefit of taking part in a sustained programme.



[29] Fair Education Alliance, 'Report Card 2022. Achieving a fair education in England', <https://static1.squarespace.com/static/543e665de4b0fbb2b140b291/t/63ce85df00392666493d4446/1674479078611/Report+Card+final.pdf>. Article accessed 24th January 2023.

[30] Office for Students, 'Our approach to access and participation' <https://www.officeforstudents.org.uk/advice-and-guidance/promoting-equal-opportunities/our-approach-to-access-and-participation/>. Article accessed 24th January 2023.

[31] Link 2020 or 2021 impact report programme section.

Maximise our long-term impact through increased Alumni support

We aim to maximise our long-term impact in three ways:

- 1 Create a pipeline to programmes after Universify – Universify was created to complement the Year 12 programmes which increase access to higher education. We aim to create a pipeline to these programmes from the Universify programme to improve access to these opportunities for our students.
- 2 Increase the number of opportunities through corporate partnership – in 2022, pilot schemes with corporate partners offered alumni access to more employment and educational opportunities. In 2023, we aim to increase our corporate partnerships to offer more opportunities for our alumni while supporting Universify to scale and helping businesses fulfil their social mobility vision.
- 3 Refine our understanding of our long-term outcomes – we will analyse trends in our long-term impact data to ensure students are sufficiently supported after they complete the programme and to identify, what, if any, additional support Universify can provide to sustain impact beyond the year-long programme.

Our plans for the future are ambitious and their success rests on continued operational resilience and long-term sustainability. We will therefore continue to develop a growing team, to refine our operational processes, and to continue to increase our fundraising income through diverse income streams.



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Kent Community Foundation
Drapers
Walcot Foundation

SENSE Foundation
Carmen Benevolent Trust
Merton College, Oxford
SurveyTech
Four Acre Trust

Worshipful Company of
International Bankers
Clifford Chance
The Kusuma Trust UK
Crux

THE FOLLOWING INDIVIDUALS FOR THEIR SERVICES

Ellie Harries, Independent Impact Evaluator
Jasmine Choice, Impact Report Design
Laura Haigh and Alina Kiradjieva, HR and Finance
team, Oxford Summer Courses
Guillermo Tirelli and George Mermeklis, Web Design
and Development

Lisa McCarthy and Steph Kruger, Tutor Recruitment
Tom Bradley, Independent Accountant
Chris Tomlinson and Nicola Webb, The Co-op
Academies Trust

UNIVERSIFY TRUSTEES

Mary Nicholson
Harry Hortyn
Tibor Gold
Nick Lawrence
Shirley Mazeli, Student
Representative

Steve Rayner
Matt Lacey
Robert Phipps
Kate West

Kath Davies
James Gregory
Helen Norman
Marco Logiudice

OUR PARTNERS

True
Oxford Nanopore Technologies
Oxford Summer Courses
Co-op Academies Trust

Acknowledgements

WE WOULD LIKE TO THANK THE FOLLOWING PEOPLE AND INSTITUTIONS FOR THEIR SUPPORT, HELP, AND GUIDANCE

UNIVERSIFY VOLUNTEERS

Adam Kavanagh	Charlotte Smith	Kirsty Hardwick	Ollie Rennison
Adan Khan	Craig MacKenzie	Laura Wales	Richmond Dias
Aimee Burrus	Cris Pham	Lauren Williamson	Saffron Pougher
Aisha Toorawa	Elizabeth Olabode	Lewis Timms	Sara Vitaldurand
Alex Whitton	Ellie Ground	Maddie Clark-Jones	Shireen Obalim
Alex Lowrie	Ellie Saxby	Meg Luk	Sibylle Brochard
Alexandra Haslam	Emily Nixon	Murshed Shahriyar	Socheat Nhip
Amool Raina	Erika Stefanidi	Nancy Tran	Stephen Darby
Anja Hollowell	Gabrielle Beglan	Natalia Wcislo	Susana Justham Bello
Anna Wray	Georgia Hammond	Niamh Stolvoort	Suzanne Voyce
Annabel Hall	Humairaa Parveen	Niamh Townend	Talia Rabinowitz
Beatrice Fanti	Immy Creavin	Noah Crook	Tess Newton
Bini Fatima	Josh Qiao	Noaman Malik	Wren Talbot-Ponsonby
Britney Hamersley	Jude Taylor	Nuria Arbesu	Yueyi Huang
Cat Tickell	Kate Matheson	Oghale Erikigho	Zelin Sun
Cecilia Shi	Khama Gunde	Olivia Tan	

LEAD TEACHERS

All our Lead teachers and schools who help set up the programme at each of our partner schools and support their students throughout the programme.

UNIVERSIFY TUTORS

All our Universify GCSE tutors and academic taster tutors who have taught on our courses.

Special thanks to the tutors who volunteered their time to teach on our programme:

Arthur Hicks	Joannah Fergusson	Stelios Manganis
Craig MacKenzie	Lena Sorochina	Steve Rayner
Garry Reuben Sutrisno	Lisa McCarthy	Steven Smith
Jill Campion	Matt Williams	

STUDENT COUNCIL 2021-22

Shirley Mazuri (Student Representative), Anisa, Bradley, Deborah, Fardip, Hudeyna, Josh, Khadija, and Maria

And finally we would like to thank all the students that have applied and taken part in the Universify programme, who continue to inspire and amaze us with their successes. We are immensely proud of the incredible achievements you have accomplished and will continue to do so.

Written by Sophie Grinnell and the Universify team 2022



QUALITY
OF
EQUALITY

PROBLEM

With special thanks to our partners, supports and collaborators.



OXFORD SUMMER COURSES



How to get involved

We believe universities should be open to all students, based on their academic ability and regardless of their background. If you would like to work with us, please get in touch at info@universifyeducation.com

Published May 2023.

Registered Charity Number: 1167240.

Company Registration number: 10114061 (England & Wales).

www.universifyeducation.com



UNIVERSIFY EDUCATION

England & Wales - Charity number 1167240

Accounts

Charity number: 1167240
Company Registration number: 10114061 (England & Wales)



**Trustees' Report and Unaudited Accounts
For the Year Ended 30 April 2022**

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Universify Education reference and administrative details

Trustees at time of submission

Ms Mary Nicholson (Chair)

Mr Harry Hortyn

Dr Steve Rayner

Mr Matt Lacey

Miss Helen Norman

Trustees at the time of submission appointed after the period (June 2022)

Mr Marco Logiudice

Mr James Gregory

Trustees who resigned during the period

Nick Lawrence

Trustees who resigned after the period

Mr Robert Phipps

Ms Kathryn Davies

Mr Tibor Gold MBE

Mrs Kate West

Company Number: 10114061 (England and Wales)

Charity Registration Number: 1167240

Registration Office: 18 Beaumont Street, Oxford OX1 2NA

Bankers: HSBC 65 Cornmarket Street, Oxford OX1 3HY

Independent Examiner: Thomas Bradley ACMA

Trustees' report

1. Introduction

This report should be read in conjunction with our latest impact report which is published on www.universifyeducation.com/impact. The Impact Report details the impact that Universify Education has achieved and the methodology behind how this impact is measured.

This report was prepared on behalf of the trustees in accordance with FRS102 SORP Accounting and Reporting by Charities guidelines.

2. Objectives and activities

Objectives and aims

Universify Education's charitable purpose, as set out in the governing document, is to provide equality of opportunity in education in the UK as the trustees see fit.

The charity aims to create a fairer society through social mobility by empowering young people from disadvantaged backgrounds to fulfil their potential through education, regardless of their background. Too often, young people from disadvantaged backgrounds lack the aspirations, GCSE grades and understanding of university (often believing it is not for people 'like me') to make an informed decision about university and their future. This in turn limits their personal opportunities and perpetuates a cycle of underrepresentation at university. Underrepresentation in Higher Education limits social mobility and is to the detriment of society as graduates often take up important decision-making roles in society without being representative of that society, reinforcing existing inequalities.

With the input of sector leaders, the charity designed the Universify programme to overcome three major barriers faced by participants from disadvantaged backgrounds to gaining the skills, knowledge and belief to fulfil their potential through education, including successfully applying to highly-selective universities. These barriers are:

1. Limited academic attainment
2. Low academic aspirations
3. Feeling out of place in a university setting

The Universify Education programme aims to overcome these barriers by achieving the following outcomes:

1. Increased aspirations
2. Increased attainment at GCSE
3. Increased understanding of university and university admissions

By achieving these aims Universify seeks to provide its beneficiaries with the skills knowledge and belief to make and fulfil a more informed decision about their future. In the long-term the charity also aims to improve social mobility by increasing access to a highly-selective universities.

The charity focuses on highly-selective universities both because access to universities with the highest entry requirements is most unrepresentative for those from disadvantaged backgrounds, and because a degree from these institutions has the greatest impact on improving social mobility and breaking cycles of inequality. By raising aspirations and attainment to the level required by the most competitive universities Universify Education increases the chances of improving access across Higher Education as participants have the grades, knowledge, and aspiration to study and succeed at university. In increasing access to highly-selective universities we overcome the underrepresentation in Higher Education that manifest within society and so fulfil our vision of a fairer society through social mobility.

The main activities of the charity

The charity undertakes a year-long intervention for Year 10 students from non-selective state schools. The intervention comprises three elements to equip young people with the skills, knowledge and belief to fulfil their potential through education, including accessing highly-selective universities.

1. **A week-long residential summer programme** – the residential programme provides an authentic undergraduate student experience to enable participants to feel at home in a university setting and able to make a more informed decision about their future in education. Participants attend academic classes covering a broad curriculum of subjects to improve subject knowledge and critical thinking, providing an insight into the depth and level of undergraduate study. Sessions on university admissions and university life improve participants' understanding of universities, their environment, and the admissions process. Participants complete a group work project, building on the university admissions session by designing a university, encouraging participants to consider what they are looking for from

university and what it offers. Additionally, participants take part in social activities to help them feel 'at home' at university, to challenge preconceptions, and to form supportive friendships with like-minded students to boost participant aspirations and attainment, as they support each other in a community which they may struggle to find back at school.

2. **Monthly one-to-one academic coaching** - Coaching empowers students to be self-directed learners. We pair students with a coach, usually a current/recent undergraduate, with shared interests. Unlike mentors, a coach does not focus on giving advice. Instead, they guide students through the process of reflecting on what they want to achieve and creating a plan to reach their aspirations. This helps students to explore their unique strengths and interests to gain the confidence and problem-solving skills to commit to their chosen path both during and beyond the Universify programme. In the short-term coaching also provides a space for students to set and work towards academic goals to boost their GCSE attainment as the foundation for pursuing future opportunities.

3. **A 3-day residential Spring revision programme** - participants return to host partner university colleges during the spring of Year 11 to revise core subjects for their upcoming GCSEs, gaining the tools to attain the best grades. Here participants also look beyond Universify and are encouraged to engage with further programmes, such as the Sutton Trust Summer School, Multiverse, and UNIQ. Students also complete an employability workshop to improve knowledge of the opportunities and options offered by a degree. After completing the spring residential, remote coaching continues until participants receive their GCSE results.

Following the completion of the year-long programme Universify participants become Universify alumni, receiving a monthly newsletter to share participants' stories post-Universify and highlight further opportunities on other programmes and career, internship and work experience programmes. This has led to many alumni joining Year 12 programmes such as In2Science, the Social Mobility Foundation programme, and the Sutton Trust Summer school as well as becoming members of the Fair Education Alliance Youth Steering Group.

Delivering the Universify programme

A Universify Head Office team prepares the courses, trains, and supports volunteer and tutor delivery teams, and oversees safeguarding, with two Designated Safeguarding Leads who are also trained Mental Health First Aiders. The programme and coaching are delivered by volunteers, who

are all recent or current university students from across the UK. Course Directors, experienced in running residentials, oversee the courses and all volunteers are trained in coaching, health and safety, and safeguarding. Volunteers undergo enhanced DBS checks and two reference checks, are trained by Universify staff in our policies and procedures, and attend regular course catchups to receive support and guidance with remote coaching. The Universify safeguarding team is also contactable outside of formal catchups to support volunteers with any concerns. Seminars are delivered by experienced university tutors and revision classes taught by current GCSE tutors with a strong knowledge of the syllabus. All classes have a volunteer present to support in the delivery of the classes.

The charity works closely with other institutions to deliver its activities. Universify works with secondary schools across the country who send participants on our programme. We partner with colleges at the Universities of Oxford and Cambridge, working with their link regions and holding our residentials at these colleges. In 2021-22 we partnered with Balliol College, Jesus College, Somerville College, St Anne's College, St Hugh's College and Trinity College at the University of Oxford and with St Catharine's College at the University of Cambridge.

Adapting to COVID-19

Due to the high-infection COVID-19 infection rates the Universify summer residentials in 2021 were delivered online. We built on the success of our 2020-21 online programme incorporating student feedback. For safeguarding purposes sessions were recorded and spot-checked and volunteers were present in all online activities. We returned to in-person programme delivery for the Spring residentials in 2022, which we extended by a day to offer students more time to experience a university setting having attended the summer course online.

Ensuring the charity's work delivers its aims

The charity measures its impact annually, through pre- and post-course surveys to gather participant feedback. Universify's impact measurement methodology was designed by our former trustee for impact measurement, Dr George Hoare, and an independent impact evaluator, Ellie Harries, who annually reviews our data and impact report to ensure it is accurate. The charity also reviews its impact measurement approach annually.

The findings of the impact report measure how successfully the charity is providing participants with the skills, knowledge, and belief to fulfil their potential through education. We measure this against our three desired short-term outcomes: raising aspirations, academic attainment, and

understanding of university and university admissions and our long-term mission of improving social mobility and overcoming underrepresentation at university by increasing the likelihood of making a successful application to a highly-selective university. These findings are used to refine the Universify programme to make sure activities are as effective as possible in achieving the charity's objectives. In addition, feedback is gathered from Universify participants, volunteers, and staff as part of an annual programme review contributing to the development and implementation of an annual improvement plan.

To ensure our work continues to best meet the needs of our beneficiaries, the charity recruits a student council of Universify alumni, led by a student representative who attends board meetings. The student council and representative work with Universify and alumni and are consulted on the charity's strategy and programme plans to ensure the Universify programme continues to be directed by the charity's beneficiaries.

How the charity's activities deliver public benefit

The activities undertaken further the charity's purposes for the public benefit increasing social mobility by equipping young people with the skills, knowledge, and belief to fulfil their potential through education regardless of their background. More specifically we overcome underrepresentation within Higher Education which perpetuates underrepresentation in society, by raising the aspiration and attainment of the students who take part and increasing their knowledge of universities in the UK. The intervention increases the likelihood that these students will make successful applications to highly-selective universities, and ultimately increasing the diversity of socio-economic backgrounds at highly-selective universities.

The trustees have had regard to the Charity Commission's guidance on public benefit.

3. Achievements and performance

During the year 2021-22 the charity delivered its programme to 188 participants. The charity also evaluated the impact of the programme on its third cohort who completed the Universify Education Spring residential in April 2019.

A full summary of the charity's ongoing impact and achievements can be found in its latest impact report - <https://www.universifyeducation.com/impact>.

How the charity performed against its objectives

For 2021-22 the charity continued to work towards the following long-term objectives:

1. Financial sustainability
2. Achieving a strong delivery record improving outcomes and robust impact measurement

In achieving these two long-term objectives the charity will be in a position to sustainably scale its work and achieve greater impact by reaching more young people with an evaluated and refined intervention.

To move towards these objectives and to navigate the ongoing pandemic, the charity outlined the following short-term goals:

1. Successfully adapt and deliver Universify programme to an expanded cohort to continue to support participants during the pandemic.
2. Increase fundraising focus to maintain financial resilience, diversify charity income streams, and to develop long-term funding sources to facilitate growth
3. Implement a plan to gather detailed, individual destination data for Universify alumni to track our long-term impact and refine our programme to maximise its impact.
4. Strengthen and develop further support for Universify alumni to maintain and maximise the programme's long-term impact.

In 2021-22, Universify continued to deliver positive impact at an increased scale while the accounts, included in this report, show that the charity has continued to work within its financial constraints.

The financial review also shows that progress has been made to diversify Universify's income to increase financial resilience and develop the sustainability required to scale the programme. To help us work towards this goal Universify recruited a part-time fundraiser through the government Kickstart scheme which provided employment opportunities to a young person during the pandemic. The impact of the Kickstarter was significant in securing additional trust and foundation grants. This fundraising success meant we chose create a full-time fundraising role for the Kickstarter contract at the end of the six month scheme to enable us to continue to diversify our income streams so we can continue to sustainably scale the Universify programme.

Financial review

The direct resource costs of the Summer and Spring programmes are summarised in the charity's accounts which have been prepared in accordance with the provisions applicable to small companies limited by guarantee regime and FRS102 SORP Accounting and Reporting by Charities.

- £152,850.05 of income related to fundraising activity including donations from charitable trusts and foundations, corporate partners, public fundraising, and private individuals.
- £15,830.25 of income related to grants through the government Furlough and Kickstart scheme
- £94,423.00 worth of benefits in kind were received in the form of donated services by Oxford Summer Courses Limited and accommodation, meals and classrooms donated by partner University colleges who host the University residentials. The benefits were calculated by conforming to the market value at the time of use.
- There was a surplus generated in this year of £31,367.90, which is due to success in fundraising and running under budget, partly due to moving the University programme online. These funds will contribute to increasing the charity's resilience following the instability of the pandemic and more importantly allow the charity to reinvest these funds in sustainably scaling our work to achieve more impact.

Reserves policy and amount of reserves held

University Education's aim is to generate and maintain free reserves equal to 3 months' running costs through fundraising activity. These free reserves are built up after considering future costs that are committed to delivering our year-long programme.

At 30 April 2022, the end of University's sixth year of operations, the charity had £57,293.73 in reserves. Of these reserves £12,293.73 represent free reserves in accordance with the above policy, the remainder being committed to ensuring the delivery of the summer residential of our 2022-23 programme which begins in August and for which we are fundraising the remaining cost.

Given University's reserves balance and with the securing of £35,000 of income for 2022-23, the trustees are confident of the charity's ability to continue as a going concern for the next 12 months.

There are no funds or subsidiary undertakings that are materially in deficit.

Principal sources of funds

In general, the principal funding sources for the charity are through fundraising income from trusts and foundations, public fundraising, private donors, and corporate partnerships. For its first five years University Education received start-up funding from Oxford Summer Courses Limited, with the contribution amount decreasing each year, from 100% in 2016 to 25% in 2020-21. As the start-up funding reduces the charity pursues alternative sources of funding through fundraising activities.

For 2021-22, the Charity received the second installment of a two-year grant from the Nisbet Trust to fund participants from Bristol on the Universify programme. In addition, the charity received the third installment of a three-year grant from Macquarie Group Foundation. The charity received support for staff costs through the government furlough scheme and through the Kickstart scheme, where Universify supported four young people in receipt of Universal Credit to provide a six-month work placement and training to support their future employment. The Government Kickstart scheme allowed us to increase our fundraising capacity which contributed to increased fundraising success as we were able to produce more high-quality applications to trusts and foundations. In addition, the charity continued to maintain consistency in public fundraising income, which increased during the pandemic.

Finally, the charity piloted a part-funding model with Jesus College, University of Oxford, a partner University college, whereby Jesus contributed to Universify's cost per student to cover programme costs including tutor, volunteer, and on-course activity costs as part of a partnership to achieve a shared university access mission.

For 2022-23, the charity has secured £35,750 of income for the next financial year through trusts and foundation grants towards the 2022-23 programme. In addition, following the successful pilot of the part-funding relationship with Jesus College, the charity has converted its other university college partnerships into part-funding relationships. This transition aims to contribute to Universify's long-term goal of developing long-term financial sustainability in order to sustainably scale the charity's work to meet the growing need and demand for the Universify programme. The charity is grateful for the support and ongoing partnership with host colleges in our shared mission to further educational equality through university access.

Due to fundraising success, we have chosen to extend the contract of our fundraising Kickstarter to maintain the consistency, quantity and quality of our fundraising activities as we look to continue to diversify our income to facilitate sustainable scale. To achieve this aim of diversification in 2022-23 we want to increase our corporate partnerships opening up a new income stream while providing impactful employability opportunities and career insights to our participants.

Finally, in 2022-23 the charity is due to receive the fifth year of start-up funding from Oxford Summer Courses which was deferred due to the pandemic.

Plans for future periods

Although we have seen increased fundraising success and a return to in-person delivery in 2021-22, the charity's aims for 2022-23 are shaped in the context of the anticipated cost of living crisis. In this context the charity is aware of the impact this could have on the fundraising landscape. Therefore, fundraising will remain a priority both to diversify the charity's income to facilitate sustainable scale and to build financial resilience. The cost of living crisis is also likely to increase the growing demand and need for Universify's work. Therefore, the other major focus for the charity in the upcoming year will be to lay the foundations to meet this growing demand.

Practically this means more partnerships with university colleges and universities outside of Oxford and Cambridge to increase the number of places on the Universify programme. The charity also recognizes the importance of expanding beyond the Universities of Oxford and Cambridge to overcome the geographical barriers some participants face to accessing the programmes in these two cities. This approach will seek to fulfil the charity's long-term sustainability plan of working with Widening Participation Offices at the universities of college partners, becoming part of their Access and Participation Plans, which are funded by the Office for Students. In the next period the charity will seek to build on the part-funded college relationships by approaching more colleges and universities utilising this model for sustainable growth.

The charity recognises that expansion requires the resources to do so and programme growth will always be considered by trustees in line with financial constraints, ongoing fundraising work, and the awareness of the increasing demand for the charity's work.

4. Structure, governance, and management

Universify Education is a company limited by guarantee incorporated on 9th April 2016 and registered as a charity on 20th May 2016.

The company was established under a Memorandum of Association which outlined the objects and powers of the charitable company and is governed under its Articles of Association.

Recruitment and appointment of trustees

The Trustees who served during the period and up to the date of this report are set out on page 3.

The charity uses an annual trustee skills audit to assess whether the board has the appropriate mix of skills. Gaps may be met with training, third party expertise or new trustee recruitment. When recruiting new trustees, the board aims to find individuals who can support the charity's growth and

bring in additional resources, expertise, lived experience and connections to help Universify achieve its goals.

The results of this annual trustee skills audit highlighted gaps that the board chose to fill by recruiting additional trustees. In particular the board sought to add more trustees with recent lived experience of the challenges faced by our beneficiaries and recent experience of the education system to ensure our work continues to best meet the needs of our beneficiaries.

To ensure a fair and nondiscriminatory recruitment process Universify Education followed the UK Employment legislations and Charity Commission's CC30 trustee recruitment guidance. No other person or external body is entitled to appoint charity trustees.

Organisational structure

The role of the Board is to provide oversight of the charity's activities, including planning, approval of annual budgets and review of the charity's strategy, results, and achievements. The Board also provides general support to the staff. The day-to-day running of the charity is carried out by the staff team, with support from volunteers. During the year to April 2022 the board met four times for quarterly board meetings.

Risk management

The Trustees have conducted a review of the major risks to which the charity is exposed. A risk register has been established and is reviewed at quarterly board meetings. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces. Identified risks are minimised by the implementation of procedures for safeguarding staff, volunteers, and participants. These procedures are reviewed annually to ensure that they continue to meet the needs of the charity. The charity is supported in the development of its policies and procedures by Oxford Summer Courses Limited, whose policies and procedures have been accredited by the British Council and British Accreditation Council.

Trustees' duties

- Act as stewards of Universify Education so that the charity can most fully deliver on its mission to address educational inequality in the long-term. Trustees will consider issues of strategic (rather than operational) importance at quarterly meetings

- Attend at least 75% of the quarterly Trustees meetings that will be held online and in-person in Oxford and London (reasonable transport expenses will be reimbursed), having read any briefings which will be circulated at least 7 days prior to the meeting date
- Trustees will have specific duties related to an area of expertise that is agreed when they are recruited to the board of trustees. Trustees must be clear what information they need from staff to carry out their governance role properly, and any required training or resources are provided.

During the period during this year where the infection rates for COVID-19 pandemic remained high and restrictions remained in place board meetings were held online. Following the easing of restrictions and the return to in-person programme delivery board meetings are now run in a hybrid manner allowing trustees to join online or in-person.

Current trustees' areas of focus

Trustee	Date appointed	Focus area
Harry Hortyn	May-16	<ul style="list-style-type: none"> • Brings experience of running accredited academic short courses as co-founder of Oxford Summer Courses Limited and 5 years in social investment • Supports charity strategy, provides links to key stakeholders in Oxford and oversees sign-off of Oxford Summer Courses' contributions. • Previous chair of the board
Robert Phipps	May-16 Retired June-22	<ul style="list-style-type: none"> • Brings experience of running accredited academic short courses as co-founder of Oxford Summer Courses Limited and background in strategy consultancy
Matt Lacey	May-17	<ul style="list-style-type: none"> • Brings experience as CEO of surveying company and a background in acting and media • Profile-building through press coverage, speaking platforms
Steve Rayner	Aug-17	<ul style="list-style-type: none"> • Brings experience of university admissions, tuition, and governance • Providing advice on programme development and approaches to colleges or universities, and partnership with Somerville college
Mary Nicholson	Jun-18	<ul style="list-style-type: none"> • Brings experience of risk and financial management from a background in finance, risk and sustainability in the financial services sector • Current Chair of the board
Tibor Gold MBE	Dec-18 Retired Jun-22	<ul style="list-style-type: none"> • Brings experience in IP law and over a decade of trusteeships • Providing advice on fundraising and approaches and introductions to corporate partners

Kate West	Jun-19 Retired Aug-22	<ul style="list-style-type: none"> • Brings fundraising experience, offering insight and guidance on Universify's fundraising strategy
Kathryn Davies	Jun-19 Retired Jun-22	<ul style="list-style-type: none"> • Brings experience working within the sector and of impact reporting to help Universify continue to robustly collect and report on its impact.
Helen Norman	March-22	<ul style="list-style-type: none"> • Brings recent lived experience of the education system and challenges faced by beneficiaries to fulfil their potential in education • Brings experience working in the sector
James Gregory	Jun-22	<ul style="list-style-type: none"> • Providing teacher insight to school and student recruitment and programme design • Brings safeguarding experience
Marco Loguidice	Jun-22	<ul style="list-style-type: none"> • Brings recent lived experience of the education system, experience as a former Universify volunteer and experience of the challenges faced by beneficiaries to fulfil their potential in education • Brings fundraising and strategic experience

To ensure the charity continues to best meet the needs of its beneficiaries Universify Education appoints a Student Representative who is a member of the student council and a recent Universify alumnus. The Student Representative attends trustee board meetings but does not hold legal responsibility for the charity in the same way as the other trustees.

The report of the trustees was approved by the trustees on 10th January 2023 and signed on their behalf by:

Signature: 

Print name: Mary Nicholson

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF UNIVERSIFY EDUCATION

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 ("the Charities Act") and that an independent examination is needed

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention

Basis of independent examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

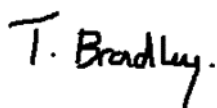
In connection with my examination, no material matters have come to my attention which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

Signed:

Date: 10th January 2023



Name: Thomas Bradley ACMA

Relevant professional body if any: Chartered Institute of Management Accountants

Address: 16, Rue Adam Roberti, Luxembourg-Merl, L-2429, Luxembourg

Income and Expenditure Account University Education 1 May 2021 to 30 April 2022

Income	2021-22	2020-21	Notes
Unrestricted income	£ 59,322.90	£ 80,825.80	
Restricted income	£ 85,948.11	£ 24,515.05	1
Income from charitable activities	£ 7,579.04	£ -	2
Grant income	£ 15,830.25	£ -	3
Total donation income	£ 168,680.30	£ 105,340.85	
Benefits in kind received			
College accommodation and meals	£ 80,248.00	£ -	4
Oxford Summer Courses Limited	£ 14,175.00	£ 11,153.85	5
Total income	£ 263,103.30	£ 116,494.70	

Programme costs			
Coach platform	£ 498.00	£ 150.00	
On course - Activities	£ 2,852.26	£ 1,662.19	
On Course-Staff Training	£ 819.68	£ 596.50	
On Course-Staff Travel	£ 1,865.03	£ -	6
Tutor costs	£ 5,152.46	£ 2,198.00	7
Volunteer engagement	£ 224.50	£ -	
College accommodation and meals	£ 80,248.00	£ -	
Oxford Summer Courses Limited	£ 14,175.00	£ 11,153.85	
Total Programme costs	£ 105,834.93	£ 15,760.54	
Net income less programme costs	£ 157,268.37	£ 100,734.16	

Expenditure			
Advertising & Marketing	£ 831.26	£ 49.29	
Bank Fees	£ 25.00	£ -	
Charitable and Political Donations	£ 51.50	£ -	
Employers National Insurance	£ 4,669.96	£ 3,281.90	
Fundraising costs	£ 427.87	£ 772.09	
General Expenses	£ 19.27	£ -	
Independent Evaluation	£ 2,000.00	£ 2,400.00	
Insurance	£ 335.20	£ 296.59	
IT Software and Consumables	£ 2,735.39	£ 613.34	8
Medical costs	£ -	£ 25.00	
On Course - Staff Recruitment	£ 1,071.20	£ 707.43	
Pensions Costs	£ 2,229.98	£ 1,844.44	
Postage, Freight & Courier	£ 142.55	£ 282.80	
Printing & Stationery	£ 8.90	£ 138.48	
Registration and filing costs	£ 13.00	£ -	
Salaries	£ 110,077.27	£ 88,253.58	9
Staff Training	£ 238.00	£ 48.48	
Subscriptions	£ 35.00	£ 111.33	
Telephone & Internet	£ 36.00	£ 98.00	
Travel - National	£ 854.32	£ 143.64	10
Trustee Expenses	£ 98.80	£ -	
Total Expenditure	£ 125,900.47	£ 99,066.39	

Current year funds	£ 31,367.90	£ 1,667.77	11
Retained funds	£ 25,925.83	£ 24,258.06	
Total funds carried forward	£ 57,293.73	£ 25,925.83	12

Balance Sheet University Education as at 30 April 2022

Fixed Assets	Apr-22 (£)	Apr-21 (£)	Notes
Tangible Assets			
Computer Equipment	2,992.43	-	13
Total Tangible Assets	2,992.43	-	
Total Fixed Assets	2,992.43	-	

Current Assets			
Cash at bank and in hand			
Expenses account	1,090.39	-	
University Education	93,557.40	98,143.10	
Total Cash at bank and in hand	94,647.79	98,143.10	
Prepayments	345.49	267.92	14
Total Current Assets	94,993.28	98,411.02	

Liabilities: amounts falling due within one year			
Accruals	2,506.91	203.86	
Deferred income	35,750.00	71,710.00	15
NIC Payable	802.77	-	
PAYE Payable	928.80	-	
Pensions Payable	680.75	558.33	
Unpaid Expense Claims	22.75	13.00	
Total Liabilities: amounts falling due within one year	40,691.98	72,485.19	

Net Current Assets	54,301.30	25,925.83	
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Net Assets	57,293.73	25,925.83	
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The funds of the Charity			
Unrestricted income funds	57,293.73	25,925.83	12
Restricted income funds	-	-	
Total funds of the Charity	57,293.73	25,925.83	

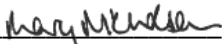
The company was entitled to exemption from audit under s477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to small companies subject to the small companies regime and in accordance with FRS102 SORP.

Approved by the directors and authorised for issue on 10th January 2023.

Signed by  on behalf of all the trustees/directors

Print Name: Mary Nicholson

Date: 10th January 2023

Notes forming part of the Financial Statements**Restricted income usage**

	Amount	Detail
Project	£ 77,228.11	Funding for participants from specific regions including Bristol; Funding towards our online summer programme at a partner university college; Funding towards fundraising training sessions; Funding for participants on our extended in-person <u>Spring residential in 2022</u>
Partner University college part-funding	£ 8,720.00	Part-funding of participant places from a partner college to fund cohort expansion
Total	£ 85,948.11	

2) Other revenue refers to income generated providing support to partners to deliver activities contributing to our shared missions, for example recruiting students from underrepresented backgrounds for a STEM day

3) Grant income refers to income through the government furlough and Kickstart scheme

Grant income source	Amount
Furlough	£ 1,739.38
Kickstart	£ 14,090.87
Total	£ 15,830.25

4) Benefits in kind - accommodation, meals, and classroom space from partner university colleges. In 2020-21 the programme was online so there were no benefits in kind for accommodation and meals.

Benefit in kind breakdown

Accommodation	£ 52,156.00
Meals	£ 19,992.00
Teaching space	£ 8,100.00
Total	£ 80,248.00

5) Benefits in kind - Oxford Summer Courses limited

Item	Cost
Office space	£ 4,200
IP*	£ 5,000
Staff time donation scheme**	£ 4,975
Total Oxford Summer Courses benefits in kind	£ 14,175

***Estimated value of ongoing IP re policies and IT and technical support**

**Staff time donation scheme involves Oxford Summer Courses matching volunteer time by with time at work up to a day a month

6) The return to in-person delivery explains the significant increase in travel costs (from £0 in 2020-21 to £1,865.03 in 2021-22) to cover Volunteer travel to the residential Spring programme

7) The return to in-person delivery and an extended Spring residential explains the significant increase in tutor costs (from £2,198 in 2020-21 to £5,152.46 in 2021-22)

8) Increase from 2020-21 due to investment in Salesforce development to create resilience, efficiencies and scalability in digital systems (from £613.34 in 2020-21 to £2,735.39 in 2021-22). The development will mean that we have more efficient systems for volunteer, student and school recruitment and management and coaching management

9) Increase in salaries (from £88,253.58 in 2020-21 to £110,077.27 in 2021-22) a combination of the government Kickstart scheme and extending the contract of a Kickstart employee after they completed the government programme

10) Increased travel cost (from £143.64 in 2020-21 to £854.32 in 2021-22) a result of the easing of restrictions from the pandemic allowing more in-person meetings and staff travel to residential programmes

11) The significant increase in surplus funds (from £1,667.77 in 2020-21 to £31,367.90) were a result of running underbudget and significantly increased fundraising success. These funds will contribute to increasing the charity's resilience following the instability of the pandemic and more importantly allow the charity to reinvest these funds in sustainably scaling our work to achieve more impact.

12) In accordance with our free reserves policy of the total funds carried forward on 31st April 2022 (£57,293.73) we have £12,293.73 of free reserves. Our free reserves are the reserves not committed to guaranteeing the delivery of our 2022-23 programme where we have already committed to a set programme size, which takes into account our reserve and fundraising position. Therefore, we have ringfenced the remaining funds carried forward (£45,000) for the 2022-23 University programme.

13) Tangible Assets - Computer equipment*

Assets at 31st April 2022	Computer equipment
Cost at 1st May 2021	£ -
Additions	£ 2,992.43
Disposals	£ -
At 31st April 2022	£ 2,992.43
<hr/>	
Depreciation	
At 1st May 2021	£ -
Charge for the year	£ -
Disposals	£ -
At 31st April 2022	£ -
<hr/>	
Net book amount at 31st April 2022	£ 2,992.43
<hr/>	
Net book amount at 31st April 2021	£ -

*Computer equipment depreciation policy is straight line over four years

14) Prepayments cover expenditure incurred in 2020-21 for 2021-22 expenses, such as insurance cover, ICO subscription, our coaching platform subscription, and website hosting

15) Deferred income includes project funding for 2022-23 participants

UNIVERSIFY EDUCATION

England & Wales - Charity number 1167240

Accounts

Charity number: 1167240
Company Registration number: 10114061 (England & Wales)



**Trustees' Report and Unaudited Accounts
For the Year Ended 30 April 2021**

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Universify Education reference and administrative details

Trustees at time of submission

Ms Mary Nicholson (Chair)

Mr Harry Hortyn

Mr Tibor Gold MBE

Mr Nick Lawrence

Dr Steve Rayner

Mrs Kate West

Ms Kathryn Davies

Mr Matt Lacey

Mr Robert Phipps

Company Number: 10114061 (England and Wales)

Charity Registration Number: 1167240

Registration Office: 18 Beaumont Street, Oxford OX1 2NA

Bankers: HSBC 65 Cornmarket Street, Oxford OX1 3HY

Independent Examiner: Thomas Bradley ACMA

Trustees' report

1. Introduction

This report should be read in conjunction with our latest impact report which is published on www.universifyeducation.com/impact. The Impact Report details the impact that Universify Education has achieved and the methodology behind how this impact is measured.

This report was prepared on behalf of the trustees in accordance with FRS102 SORP Accounting and Reporting by Charities guidelines.

2. Objectives and activities

Objectives and aims

Universify Education's charitable purpose, as set out in the governing document, is to provide equality of opportunity in education in the UK as the trustees see fit.

The charity aims to create a fairer society through social mobility by empowering young people from disadvantaged backgrounds to fulfil their potential through education, regardless of their background. Too often, young people from disadvantaged backgrounds lack the aspirations, GCSE grades and understanding of university (often believing it is not for people 'like me') to make an informed decision about university and their future. This in turn limits their personal opportunities and perpetuates a cycle of underrepresentation at university. Underrepresentation in Higher Education limits social mobility and is to the detriment of society as graduates often take up important decision-making roles in society without being representative of that society, reinforcing existing inequalities.

With the input of sector leaders, the charity designed the Universify programme to overcome three major barriers faced by participants from disadvantaged backgrounds to gaining the skills, knowledge and belief to fulfil their potential through education, including successfully applying to highly-selective universities. These barriers are:

1. Limited academic attainment
2. Limited academic aspirations
3. Feeling out of place in a university setting

The Universify Education programme aims to overcome these barriers by achieving the following outcomes:

1. Increased aspirations
2. Increased attainment at GCSE
3. Increased understanding of university and university admissions

By achieving these aims Universify seeks to provide its beneficiaries with the skills knowledge and belief to make an informed decision about their future and in the long-term to increase the likelihood that participants make a successful application to a highly-selective university

The charity focuses on highly-selective universities both because access to universities with the highest entry requirements is most unrepresentative for those from disadvantaged backgrounds, and because a degree from these institutions has the greatest impact on improving social mobility and breaking cycles of inequality. By raising aspirations and attainment to the level required by the most competitive universities Universify Education increases the chances of improving access across Higher Education as participants have the grades, knowledge, and aspiration to study and succeed at university. In increasing access to highly-selective universities we overcome the underrepresentation in Higher Education that manifest within society and so fulfil our vision of a fairer society through social mobility.

The main activities of the charity

The charity undertakes a year-long intervention for Year 10 students from non-selective state schools. The intervention comprises three elements to equip young people with the skills, knowledge and belief to fulfil their potential through education, including accessing highly-selective universities.

1. **A week-long residential summer programme** – the residential programme provides an authentic undergraduate student experience to enable participants to feel at home in a university setting and able to make a more informed decision about their future in education. Participants attend academic classes covering a broad curriculum of subjects to improve subject knowledge and critical thinking, providing an insight into the depth and level of undergraduate study. Sessions on university admissions and university life improve participants' understanding of universities, their environment, and the admissions process. Participants complete

a group work project, building on the university admissions session by designing a university, encouraging participants to consider what they are looking for from university and what it offers. Additionally, participants take part in social activities to help them feel 'at home' at university, to challenge preconceptions, and to form supportive friendships with like-minded students to boost participant aspirations and attainment, as they support each other in a community which they may struggle to find back at school.

2. **Monthly one-to-one academic coaching** - Coaching empowers students to be self-directed learners. We pair students with a coach, usually a current/recent undergraduate, with shared interests. Unlike mentors, a coach does not focus on giving advice. Instead, they guide students through the process of reflecting on what they want to achieve and creating a plan to reach their aspirations. This helps students to explore their unique strengths and interests to gain the confidence and problem-solving skills to commit to their chosen path both during and beyond the Universify programme. In the short-term coaching also provides a space for students to set and work towards academic goals to boost their GCSE attainment as the foundation for pursuing future opportunities.
3. **A 3-day residential Easter revision programme** - participants return to host partner university colleges in spring of Year 11 to revise core subjects for their upcoming GCSEs, gaining the tools to attain the best grades. Here participants also look beyond Universify and are encouraged to engage with further programmes, such as the Sutton Trust Summer School, Multiverse, and UNIQ. Students attend a careers fair to improve knowledge of the opportunities and options offered by a degree. After completing the spring residential, remote coaching continues until participants receive their GCSE results.

Following the completion of the year-long programme Universify participants become Universify alumni, receiving a monthly newsletter to share participants' stories post-Universify and highlight further opportunities on other programmes and career, internship and work experience programmes. This has led to many alumni joining Year 12 programmes such as In2Science, the Social Mobility Foundation programme, and the Sutton Trust Summer school as well as becoming members of the Fair Education Alliance Youth Strategy Group.

Delivering the Universify programme

A Universify Head Office team prepares the courses, trains, and supports volunteer and tutor delivery teams, and oversees safeguarding, with two Designated Safeguarding Leads who are also trained Mental Health First Aiders. The programme and coaching are delivered by volunteers, who are all recent or current university students from across the UK. Course Directors, experienced in running residentials, oversee the courses and all volunteers are trained in coaching, health and safety, and safeguarding. Volunteers undergo enhanced DBS checks and two reference checks, are trained by Universify staff in our policies and procedures, and attend regular course catchups to receive support and guidance with remote coaching. The Universify safeguarding team is also contactable outside of formal catchups to support volunteers with any concerns. Seminars are delivered by experienced university tutors and revision classes taught by current GCSE tutors with a strong knowledge of the syllabus. All classes have a volunteer present to support in the delivery of the classes.

The charity works closely with other institutions to deliver its activities. Universify works with secondary schools across the country who send participants on our programme. We partner with colleges at the Universities of Oxford and Cambridge, working with their link regions and holding our residentials at these colleges. In 2020-21 we partnered with Jesus College, Somerville College, and St Hugh's College at the University of Oxford and with St Catharine's College at the University of Cambridge and moved our residentials online in light of the ongoing pandemic.

Adapting to COVID-19

The Universify residentials in 2020-21 were cancelled due to the COVID-19 pandemic, school closures and national lockdown. For the 2020-21 programme we successfully translated our summer and spring courses online co-designing the courses with input from former Universify participants and volunteers. We also added an additional online booster day in October 2020 to support students with the return to in-person schooling. For safeguarding purposes sessions were recorded and spot-checked and volunteers were present in all online activities. We also ran additional coaching training and volunteer support sessions to equip them to best guide students during the lockdowns and cancellation of GCSEs in January 2021. Universify will continue and refine this online delivery method, incorporating participant feedback, until it is safe to return to delivering residential programmes.

Ensuring the charity's work delivers its aims

The charity measures its impact annually, through pre- and post-course surveys to gather participant feedback. Universify's impact measurement methodology was designed by our former trustee for impact measurement, Dr George Hoare, and an independent impact evaluator, Ellie Harries, who annually reviews our data and impact report to ensure it is accurate. The charity also reviews its impact measurement approach annually.

The findings of the impact report measure how successfully the charity is providing participants with the skills, knowledge, and belief to fulfil their potential through education. We measure this against our three desired short-term outcomes: raising aspirations, academic attainment, and understanding of university and university admissions and our long-term mission of improving social mobility and overcoming underrepresentation at university by increasing the likelihood of making a successful application to a highly-selective university. These findings are used to refine the Universify programme to make sure activities are as effective as possible in achieving the charity's objectives. In addition, feedback is gathered from Universify participants, volunteers, and staff as part of an annual programme review contributing to the development and implementation of an annual improvement plan.

To ensure our work continues to best meet the needs of our beneficiaries, the charity recruits a student council of Universify alumni, led by a student representative who attends board meetings. The student council and representative work with Universify and alumni and are consulted on the charity's strategy and programme plans to ensure the Universify programme continues to be directed by the charity's beneficiaries.

How the charity's activities deliver public benefit

The activities undertaken further the charity's purposes for the public benefit increasing social mobility by equipping young people with the skills, knowledge, and belief to fulfil their potential and access university regardless of their background. More specifically we overcome underrepresentation within Higher Education which perpetuates underrepresentation in society, by raising the aspiration and attainment of the students who take part and increasing their knowledge of universities in the UK. The intervention increases the likelihood that these students will make successful applications to highly-selective universities, and ultimately increasing the diversity of socio-economic backgrounds at highly-selective universities.

The trustees have had regard to the Charity Commission's guidance on public benefit.

3. Achievements and performance

During the year 2020-21 the charity delivered its programme to 167 participants. The charity also evaluated the impact of the programme on its third cohort who completed the Universify Education Spring residential in April 2019.

A full summary of the charity's ongoing impact and achievements can be found in its latest impact report - <https://www.universifyeducation.com/impact>.

How the charity performed against its objectives

For 2020-21 the charity continued to work towards the following long-term objectives:

1. Financial sustainability
2. Achieving a strong delivery record improving outcomes and robust impact measurement

In achieving these two long-term objectives the charity will be in a position to sustainably scale its work and achieve greater impact by reaching more young people with an evaluated and refined intervention.

To move towards these objectives and navigate the ongoing pandemic, the charity outlined the following short-term goals:

1. Successfully adapt and deliver our programme to an expanded cohort to continue to support participants during the pandemic.
2. Increase fundraising focus to maintain financial resilience and diversify charity income streams.
3. Develop organisational resilience through process and system documentation.
4. Implement a plan to gather detailed, individual destination data for Universify alumni to track our long-term impact.
5. Strengthen and develop further support for Universify alumni to maintain and maximise the programme's long-term impact.

In 2020-21, Universify continued to deliver positive impact at an increased scale while the accounts, included in this report, show that the charity has continued to work within its financial constraints. As per the Charity's objective in 2019-20, the charity ran its first programme in partnership with St Catharine's College, Cambridge. In addition, it expanded its cohort at Jesus College, Oxford, from 30 to 50 participants.

Alongside programme expansion, the charity increased its fundraising efforts focusing on diversifying income streams to build financial resilience. This involved extending the contract of a temporary team member to ensure more staff time could continue to focus on fundraising, particularly trust and foundation applications and public fundraising activities.

Financial review

The direct resource costs of the Summer and Easter programmes are summarised in the charity's accounts which have been prepared in accordance with the provisions applicable to small companies limited by guarantee regime and FRS102 SORP Accounting and Reporting by Charities.

- £105,340.85 of income related to donations from charitable trusts and foundations, corporate partners, public fundraising, and private individuals.
- £11,153.85 worth of benefits in kind were received in the form of donated services by Oxford Summer Courses Limited. The benefits were calculated by conforming to the market value at the time of use.
- There was a surplus generated in this year of £1,667.77, which is due to success in fundraising and running under budget, partly due to moving the Universify programme online.

The financial position of Universify Education at the end of the fifth year of operations is that there is £25,925.83 in reserves. In the accounting period May 2020 to April 2021 income came from fundraising activity including private donations, corporate donations, successful applications to trusts and foundations and public fundraising.

Reserves policy and amount of reserves held

Universify Education's aim is to generate and maintain free reserves equal to 3 months' running costs through fundraising activity. These free reserves are built up after considering future costs that are committed to delivering our year-long programme. While Universify has not yet reached the targeted level of reserves, the trustees are confident of the charity's ability to continue as a going concern for at least the next 12 months as 60% of Universify's required income for 2021-22 has already been secured as part of multi-year grants.

There are no funds or subsidiary undertakings that are materially in deficit.

Principal sources of funds

In general, the principal funding sources for the charity are through fundraising income from trusts and foundations, public fundraising, private donors, and corporate partnerships. For its first five years Universify Education receives start-up funding from Oxford Summer Courses Limited, with the contribution amount decreasing each year, from 100% in 2016 to 25% in 2020-21. As the start-up funding reduces the charity pursues alternative sources of funding through fundraising activities.

For 2020-21, the Charity received the first installment of a two-year grant from the Nisbet Trust to fund participants from Bristol on the Universify programme. In addition, the charity received the second installment of a three-year grant from Macquarie Group Foundation. The charity received further COVID-related grants from Macquarie Group Foundation including a one-off grant from the foundation to all grant partners and a separate donation through an application made by a trustee who works for Macquarie. These COVID-related grants covered the cost of recruiting a staff member on a fixed-term contract to help the charity balance the move online and ongoing fundraising work. The Charity also secured a grant from the Kusuma Trust to prepare and deliver the 2020 Spring programme to London participants. In addition, the charity increased its public fundraising income during the pandemic through two virtual quizzes and a Cambridge to London fundraising challenge, where participants covered the distance from Cambridge to London during the month of October.

For 2021-22, the Charity is due to receive the second installment of the two-year grant from the Nisbet Trust and the final installment of the three-year grant from Macquarie Group Foundation. Universify Education is also piloting a co-funded programme with Jesus College, Oxford, where Jesus College are contributing to Universify's cost per student to cover programme costs including tutor, volunteer, and on-course activity costs as part of a partnership that achieves a shared university access mission.

Plans for future periods

The COVID-19 pandemic has had and is expected to continue to have a significant impact on fundraising. For 2020-21 Oxford Summer Courses Limited deferred their final

contribution and a planned partnership with a corporate was cancelled. As a result, fundraising remains an increased priority for the charity looking ahead to 2021-22, particularly with two multi-year grants coming to an end in that period.

The charity extended the contract of a temporary staff member to ensure sufficient staff time for fundraising while at the same time meeting additional demands on staff time to transition cancelled residentials to online programmes. The charity will focus on securing short-term trust and foundation grants as well as more long-term multi-year grants and building on public fundraising successes.

The charity aims to achieve long-term sustainability by working with Widening Participation Offices at the universities of college partners, becoming part of their Access and Participation Plans, which are funded by the Office for Students. In addition, the college co-funding pilot will provide the opportunity to explore an additional, consistent income stream for the charity.

The charity will continue to deliver its programme online to participants until it is safe to return to in-person residentials. Further programme expansion for 2021-22 and beyond, will be considered by trustees in line with financial constraints, ongoing fundraising work, and an awareness of the increasing need for the charity's work during the pandemic.

4. Structure, governance, and management

Universify Education is a company limited by guarantee incorporated on 9th April 2016 and registered as a charity on 20th May 2016.

The company was established under a Memorandum of Association which outlined the objects and powers of the charitable company and is governed under its Articles of Association.

Recruitment and appointment of trustees

The Trustees who served during the period and up to the date of this report are set out on page 3.

The charity uses an annual trustee skills audit to assess whether the board has the appropriate mix of skills. Gaps may be met with training, third party expertise or new trustee recruitment. When recruiting new trustees, the board aims to find individuals who can support the charity's growth and bring in additional resources, expertise, lived experience and connections to help Universify achieve its goals.

To ensure a fair and nondiscriminatory recruitment process Universify Education followed the UK Employment legislations and Charity Commission's CC30 trustee recruitment guidance. No other person or external body is entitled to appoint charity trustees.

Organisational structure

The role of the Board is to provide oversight of the charity's activities, including planning, approval of annual budgets and review of the charity's strategy, results, and achievements. The Board also provides general support to the staff. The day-to-day running of the charity is carried out by the staff team, with support from volunteers. During the year to April 2021 the board met four times for quarterly board meetings and for an additional virtual strategy session in June 2020.

Risk management

The Trustees have conducted a review of the major risks to which the charity is exposed. A risk register has been established and is reviewed at quarterly board meetings. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces. Identified risks are minimised by the implementation of procedures for safeguarding staff, volunteers, and participants. These procedures are reviewed annually to ensure that they continue to meet the needs of the charity. The charity is supported in the development of its policies and procedures by Oxford Summer Courses Limited, whose policies and procedures have been accredited by the British Council and British Accreditation Council.

Trustees' duties

- Act as stewards of Universify Education so that the charity can most fully deliver on its mission to address educational inequality in the long-term. Trustees will consider issues of strategic (rather than operational) importance at quarterly meetings
- Attend at least 75% of the quarterly Trustees meetings that will be held online and in-person in Oxford and London (reasonable transport expenses will be reimbursed), having read any briefings which will be circulated at least 7 days prior to the meeting date
- Trustees will have specific duties related to an area of expertise that is agreed when they are recruited to the board of trustees. Trustees must be clear what

information they need from staff to carry out their governance role properly, and any required training or resources are provided.

During the COVID-19 pandemic all board meetings have been held online and will continue to do so until it is safe for trustees to travel and meet in-person.

Current trustees' areas of focus

Trustee	Date appointed	Focus area
Harry Hortyn	May-16	<ul style="list-style-type: none"> • Brings experience of running accredited academic short courses as co-founder of Oxford Summer Courses Limited and 5 years in social investment • Supports charity strategy, provides links to key stakeholders in Oxford and oversees sign-off of Oxford Summer Courses' contributions. • Previous chair of the board
Robert Phipps	May-16	<ul style="list-style-type: none"> • Brings experience of running accredited academic short courses as co-founder of Oxford Summer Courses Limited and background in strategy consultancy
Matt Lacey	May-17	<ul style="list-style-type: none"> • Brings experience as CEO of surveying company and a background in acting and media • Profile-building through press coverage, speaking platforms
Steve Rayner	Aug-17	<ul style="list-style-type: none"> • Brings experience of university admissions, tuition, and governance • Providing advice on programme development and approaches to colleges or universities, and partnership with Somerville college
Mary Nicholson	Jun-18	<ul style="list-style-type: none"> • Brings experience of risk and financial management from background in finance, risk and sustainability in the financial services sector • Current Chair of the board
Nick Lawrence	Dec-18	<ul style="list-style-type: none"> • Brings experience as a former lead teacher • Providing teacher insight to school and student recruitment and programme design
Tibor Gold MBE	Dec-18	<ul style="list-style-type: none"> • Brings experience in IP law and over a decade of trusteeships • Providing advice on fundraising and approaches and introductions to corporate partners
Kate West	Jun-19	<ul style="list-style-type: none"> • Brings fundraising experience, offering insight and guidance on University's fundraising strategy
Kathryn Davies	Jun-19	<ul style="list-style-type: none"> • Brings experience working within the sector and of impact reporting to help University continue to robustly collect and report on its impact.

To ensure the charity continues to best meet the needs of its beneficiaries Universify Education appoints a Student Representative who is a member of the student council and a recent Universify alumnus. The Student Representative attends trustee board meetings but does not hold legal responsibility for the charity in the same way as the other trustees.

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF UNIVERSIFY EDUCATION

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 of the Charities Act 2011 ("the Charities Act") and that an independent examination is needed

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission (under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention

Basis of independent examiner's statement

My examination was carried out in accordance with general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent examiner's statement

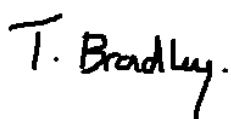
In connection with my examination, no material matters have come to my attention which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

Signed:

Date: 17th December 2021



Name: Thomas Bradley ACMA

Relevant professional body if any: CIMA

Address: 16, Rue Adam Roberti, Luxembourg-Merl, L-2429, Luxembourg

Income and Expenditure Account University Education 1 May 2020 to 30 April 2021

Income	2020-21	2019-20	Notes
Unrestricted income	£ 80,825.80	£ 81,845.38	
Restricted income	£ 24,515.05	£ -	1
Total donation income	£ 105,340.85	£ 81,845.38	
Benefits in kind received			
College accommodation and meals	£ -	£ 121,076.00	2
Oxford Summer Courses Limited	£ 11,153.85	£ 15,000.00	3
Total income	£ 116,494.70	£ 217,921.38	

Programme costs			
Coach platform	£ 150.00	£ -	
On course - Activities	£ 1,662.19	£ 3,946.51	
On Course-Staff Training	£ 596.50	£ 2,408.37	4
On Course-Staff Travel	£ -	£ 1,506.68	5
Tutor costs	£ 2,198.00	£ 5,460.00	6
College accommodation and meals	£ -	£ 121,076.00	
Oxford Summer Courses Limited	£ 11,153.85	£ 15,000.00	
Total programme costs	£ 15,760.54	£ 149,397.56	
Net income and Programme costs	£ 100,734.16	£ 68,523.82	

Expenditure			
Advertising & Marketing	£ 49.29	£ 1,094.30	7
Audit & Accountancy fees	£ -	£ 301.50	
Employers National Insurance	£ 3,281.90	£ 818.68	8
Entertainment-100% business	£ -	£ 33.75	
Fundraising costs	£ 772.09	£ 563.00	
General Expenses	£ -	£ 96.43	
Independent Evaluation	£ 2,400.00	£ 3,200.00	
Insurance	£ 296.59	£ 203.84	
IT Software and Consumables	£ 613.34	£ 320.78	
Medical costs	£ 25.00	£ -	
On Course - Staff Recruitment	£ 707.43	£ 470.17	
Pensions Costs	£ 1,844.44	£ 1,095.69	
Postage, Freight & Courier	£ 282.80	£ 2.12	
Printing & Stationery	£ 138.48	£ 11.47	
Salaries	£ 88,253.58	£ 49,962.84	8
Staff Training	£ 48.48	£ 138.50	
Subscriptions	£ 111.33	£ 23.00	
Telephone & Internet	£ 98.00	£ 15.00	
Travel - National	£ 143.64	£ 819.49	
Trustee Expenses	£ -	£ 89.60	
Total expenditure	£ 99,066.39	£ 59,260.16	

Current year funds	£ 1,667.77	£ 9,263.66	
Retained funds	£ 24,258.06	£ 14,994.40	
Total funds carried forward	£ 25,925.83	£ 24,258.06	

Balance Sheet Universify Education as at 30 April 2021

Assets	Apr-21	Apr-20	Notes
Cash at bank and in hand			
Universify Education	£ 98,143.10	£ 36,322.22	
Total Cash at bank and in hand	£ 98,143.10	£ 36,322.22	
Prepayments	£ 267.92	£ 338.98	9
Total Current Assets	£ 98,411.02	£ 36,661.20	

Liabilities			
Current liabilities			
Accruals	£ 203.86	£ 1,422.17	
Deferred income	£ 71,710.00	£ 9,615.00	10
NIC Payable	£ -	£ 414.88	
PAYE Payable	£ -	£ 568.80	
Pensions Payable	£ 558.33	£ 364.29	
Student Loan Deductions Payable	£ -	£ 18.00	
Unpaid Expense Claims	£ 13.00	£ -	
Total current liabilities	£ 72,485.19	£ 12,403.14	
Total Liabilities	£ 72,485.19	£ 12,403.14	

Net Assets	£ 25,925.83	£ 24,258.06	
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The funds of the charity			
Unrestricted income funds	£ 25,925.83	£ 24,258.06	
Restricted income funds	£ -	£ -	
Total Capital and Reserves	£ 25,925.83	£ 24,258.06	

Within this financial period there are no fixed assets, all income during this accounting period was in the form of donated facilities and services.

The company was entitled to exemption from audit under s477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to small companies subject to the small companies regime and in accordance with FRS102 SORP.

Approved by the directors and authorised for issue on 10 December 2021.

Signed by Mary Nicholson on behalf of all the trustees/directors

Print Name: Mary Nicholson Date: 10 January 2022

Notes forming part of the Financial Statements

1) Restricted income included the following donations and grants

Source	Amount	Use
Kusuma trust	£ 9,962.07	Funding to cover the costs of the 2021 Spring programme for participants from London
Nisbet trust	£ 9,615.00	Funding to cover the costs of participants from Bristol on the 2020-21 programme
Oxford Summer Courses Limited	£ 350.00	Funding for external fundraising guidance
Macquarie trustee covid grant	£ 4,587.98	COVID response funding to recruit a summer intern in June 2020 to support our move online
Total	£ 24,515.05	

2) Benefits in kind - College accommodation and meals

Due to the COVID-19 pandemic residentials at partner colleges did not happen and the University programme moved online

3) Benefits in kind - Oxford Summer Courses limited

Item	Cost
IP*	£ 5,000
Staff time donation scheme**	£ 6,154
Total Oxford Summer Courses benefits in kind	£ 11,154

*Estimated value of ongoing IP re policies and IT and technical support

**Staff time donation scheme involves Oxford Summer Courses matching volunteer time by with time at work up to a day a month

4) Reduced volunteer training costs are a result of University staff upskilling to deliver training rather than recruiting external trainers

5) No on-course staff travel costs due to the cancellation of residentials from the pandemic

6) Tutor costs reduced by moving the programme online and more tutors volunteering their time

7) Marketing costs reduced with online programmes not requiring a photographer

8) Increase in employers NI and salaries due to team increasing to 3 full-time staff and a fixed-term staff member from June 2020

9) Prepayments cover expenditure incurred in 2019-20 for 2020-21 expenses, such as insurance cover, ICO subscription, and website hosting

10) Deferred income includes the third-year grant for Macquarie Group Foundation, the second year grant from the Nisbet Trust and pilot co-funding from Jesus College