

UK ADVISING AND TUTORING

England & Wales · Charity number 1185020

Details

Other names UKAT

Status Registered

Legal form CIO

Registered 2019-08-23

Register [View on the Charity Commission register](#)

Contact

Address York St. John University
Lord Mayors Walk
York
YO31 7EX

Phone 01904 934994

Email enquiries@ukat.ac.uk

Website <https://www.ukat.ac.uk>

Activities

Objects: TO ADVANCE THE EDUCATION OF HIGHER EDUCATION STUDENTS THROUGH THE PROVISION OF EFFECTIVE PERSONAL TUTORING AND ACADEMIC ADVISING

Activities: UKAT promotes student success by advancing the field of student advising and tutoring. UKAT provides resources, guidance, professional development, and supports and disseminates research into effective practice. UKAT works directly with members, higher education institutions, and students.

Classification

- **How:** Makes Grants To Individuals, Provides Services, Provides Advocacy/advice/information, Sponsors Or Undertakes Research
- **What:** Education/training

Geography

- Northern Ireland
- Scotland
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-04-30	£124,620	£137,707	-	-
2024-04-30	£129,237	£109,794	-	-
2023-04-30	£108,043	£76,400	-	-
2022-04-30	£79,939	£66,302	-	-
2021-04-30	£83,886	£44,786	-	-

Trustees

Name	Role	Appointed
Neil Gordon Bangs	Chair	2021-09-08
Dr Ann Lesley Bingham		2020-09-10
Dr Dionne Elizabeth Barton		2020-06-01
Dr Gary Allan Jones		2025-03-05
Dr Josephine Gabi		2023-07-19
Dr Michael Hadley Talbot		2023-07-19
Dr Susan Anne Smith		2020-06-01
Gail Moriarty		2021-05-17
Oscar van den Wijngaard		2020-06-01

UK ADVISING AND TUTORING

England & Wales - Charity number 1185020

Accounts



Annual Report

2024 - 2025



Students at the Heart

UKAT is a member-led organisation supporting personal tutoring and advising in the UK, with 48 institutional members from all mission groups and a growing community of colleagues supporting each other in their roles as personal tutors or academic advisors.

Contact us

UK Advising and Tutoring

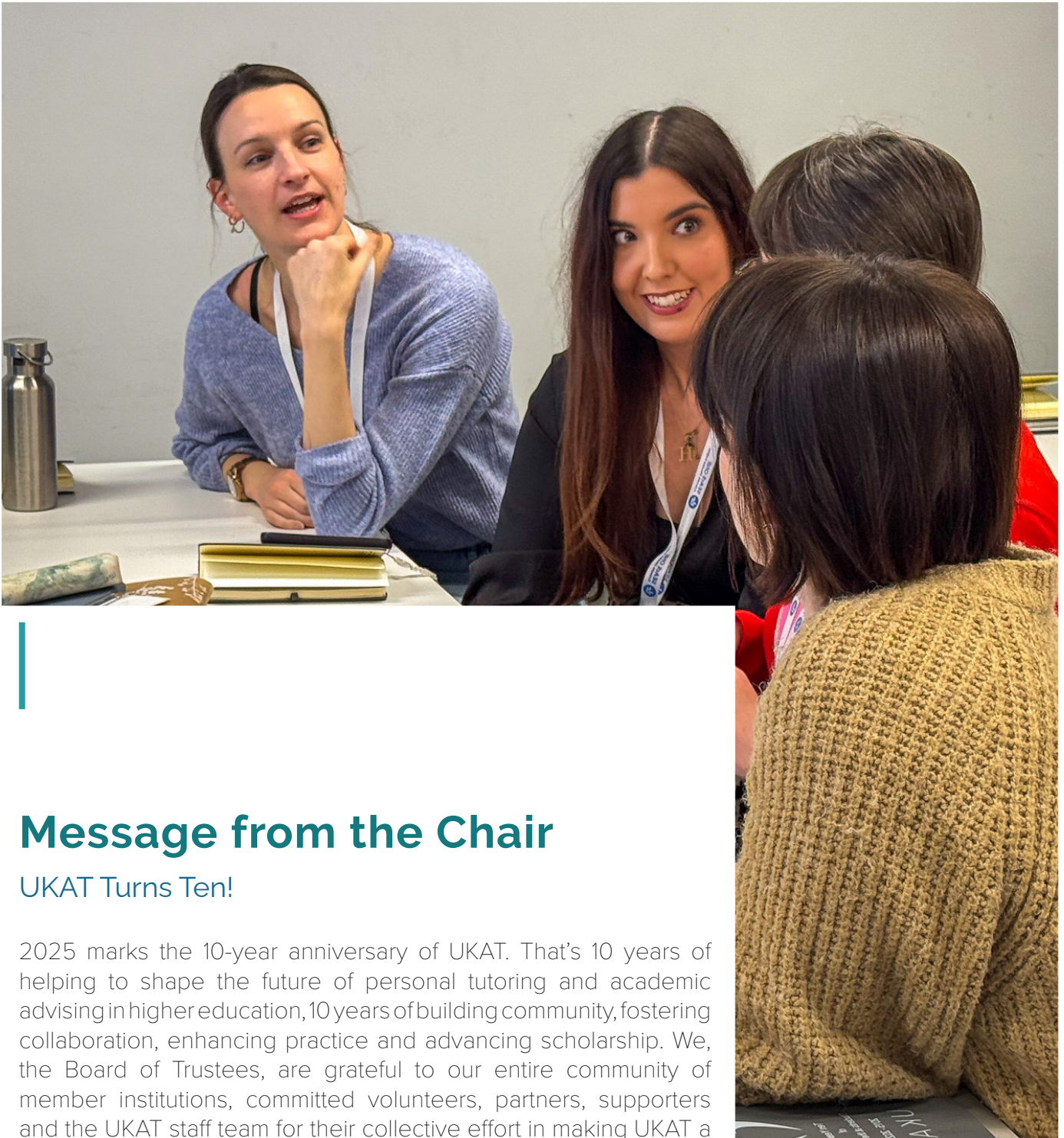
 ukat.ac.uk

 hello@ukat.ac.uk

Registered address:

York St John University, Lord Mayors Walk,
YORK YO31 7EX

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Message from the Chair

UKAT Turns Ten!

2025 marks the 10-year anniversary of UKAT. That's 10 years of helping to shape the future of personal tutoring and academic advising in higher education, 10 years of building community, fostering collaboration, enhancing practice and advancing scholarship. We, the Board of Trustees, are grateful to our entire community of member institutions, committed volunteers, partners, supporters and the UKAT staff team for their collective effort in making UKAT a success. We look forward to building on that momentum over the next decade. This annual report outlines our main activities and contributions to the sector over the past year.

Amidst a year marked by considerable challenges and uncertainty across the higher education sector, our organisation has not only persevered but continued to make meaningful progress, reflecting the resilience and commitment of our community. We have focused on ensuring we offer value for money and remain dedicated to enhancing student support and academic advising. The institutions participating in the pilot program for accredited membership have completed their first full academic year, benefiting from its numerous advantages. Additionally, we successfully hosted another conference and published the inaugural issue of the new Waypoint Journal. These initiatives reflect our ongoing pursuit of advising and tutoring excellence, even in the face of adversity.

So, as we embark on the next 10 years of commitment to innovation, community building and the continual enhancement of advising and tutoring, we look back with gratitude for what we have achieved and look forward to exciting times to come.

Neil Bangs,
UKAT Chair

Structure, Governance and Management

UKAT is a Charitable Incorporated Organisation, governed by a constitution, with a Board of Trustees elected by members of the charity.

Board of Trustees

Neil Bangs *Chair*

Susan Smith *Finance Committee Chair*

Dionne Barton

Ann Bingham *Vice-Chair (Community Engagement)*

Abigail Moriarty

Oscar van den Wijngaard *Scholarship*

Sarah Bosch *Vice-Chair (Professional Development)*

Michael Talbot *Publicity and Advocacy*

Josephine Gabi *Equity and Inclusion*

Chief Executive Officer

David Grey

UKAT has followed National Council for Voluntary Organisations (NCVO guidance, and adopted and adopted NCVO sample policies and procedures in defining its organisational structure and procedures.



Vision, Mission and Values

The UK Advising and Tutoring association (UKAT) is a charitable trust and learned society representing scholars and practitioners of personal tutoring and academic advising in the UK higher education sector.

Our vision

UKAT's vision is for every higher education student to experience effective personal tutoring and academic advising which personalises their learning and enables them to flourish.

Our mission

UKAT mission is to advance effective personal tutoring and academic advising, transforming advising practice so that every higher education student can experience inclusiveness, wellbeing and personal growth, leading them to flourish and succeed. We support the development of staff and students throughout the learning journey by sharing resources, practicing scholarly inquiry, promoting partnership, fostering community, and espousing excellence in personal tutoring and academic advising practice.

Objectives

The objects of the charity are to advance the education and success of Higher Education students through the provision of effective personal tutoring and academic advising.

Our values

Inclusive: UKAT is open, welcoming and accessible to all involved in supporting student success, including students themselves.

Collaborative: UKAT promotes partnerships across the higher sector, within institutions and with students, for the benefit of students, and for the benefit of the personal and professional development of advisors/tutors.

Listening: UKAT actively seeks the voice of students, advisors/tutors and institutions to inform thinking on current issues and to help our members in supporting their students and institutional missions.

Enabling: the UKAT community encourages and motivates advisors to improve their practice and work effectively with the diverse range of students they support.

Scholarly: UKAT seeks to advance advisor/tutor skills and practices through engagement with evidence-informed approaches.

Professional: UKAT seeks to recognise the importance of the advising/tutoring role, and to define the standards and values which underpin it, for the greater good of students, colleagues, institutions and higher education in general.

Student-Centred: Students are the reason why UKAT exists and are at the heart of everything that UKAT does.



Objectives and Activities



Objectives and Activities

UKAT seeks to achieve its objectives by advancing the field of academic advising and personal tutoring and working with key stakeholders, including members, higher education institutions, their staff, and students, to enhance academic advising and personal tutoring practice. UKAT supports the sharing and dissemination of good practices through conferences, webinars, professional development activities, professional recognition, research, resources, articles, and networking.

UKAT views itself as a learning association and promotes a scholarly-informed approach to personal tutoring/academic advising to its members, as well as the adoption of high-impact, evidence-informed practices by individual educators and their institutions to enhance student outcomes. UKAT encourages all personal tutors/academic advisors to engage with and contribute to the scholarship of the field to enhance their own practice and develop more effective practice across the whole higher education community. UKAT also supports, promotes, and facilitates the dissemination of research into personal tutoring and academic advising to enhance the publicly available evidence base of effective practices and encourage all practitioners to adopt a scholarly-informed approach.

UKAT provides a range of consultancy, professional development and training for personal tutors and academic advisors

through webinars, online courses, networking opportunities and practice-sharing events.

The two primary professional development activities offered by UKAT are a freely available monthly webinar series open to anyone and the UKAT Annual conference. UKAT partners with LVSA, the Dutch study advising association, to provide two events each year that are freely available to members of the UK and European higher education communities.

UKAT offers advice and guidance to higher education institutions seeking to improve the provision of personal tutoring and academic advising processes for their students.

It does this through:

- Publications and guidance documents, including a professional standards framework
- Freely available educational resources for higher education providers and individual personal tutors/academic advisors to use in supporting their students
- A structured Curriculum of online professional development courses and in-person workshops which available to both members and non-members
- Consulting directly with individual higher

education institutions

Improvements in Governance

Committed to our charitable mission, UKAT has made several improvements to its governance this year. This has included introducing a number of new policies from the list recommended by the Charity Commission. Additionally, to protect our long-term future, we have introduced a risk management approach and actively taken steps to mitigate our risks to ensure that we can meet our mission and strategic goals. The Board of Trustees regularly monitor and review our risk register, and the risk mitigation strategies that we adopt.

Main Achievements

UKAT Grows!

Despite turbulent times in the sector, UKAT continues to grow. Our membership has remained steady, demonstrating the value that institutions put on the value of advising and tutoring and the value of the support that UKAT gives them. The Professional Recognition scheme has seen the largest number of applicants register in a given year. We are thrilled to have granted 61 individuals Professional Recognition awards, acknowledging their incredible work in supporting students.

The UKAT Professional Development Curriculum has added three new online modules, bringing the total to 15 and covering a range of topics. Engagement with these modules has continued to be high, with more than 479 module registrations across the curriculum. We even have several individuals who have completed all of the modules! Even more thrilling, we're gearing up to launch an expanded suite of facilitated workshops and offering our UKAT community opportunities to get involved with development and facilitation, highlighting our continued spirit of collaboration.

Now a mainstay in our calendar, our webinar series *Tutoring Matters* continues to prove popular with our membership. This year, we have added to our already extensive archive of webinar recordings with another 11 delivered by experts from across the sector. In the live sessions alone, we reached 737 participants from across the 141 institutions, representing more than 700 hours of CPD and knowledge exchange provided to our community.

We are delighted to announce that we have grown our staff team by introducing a Chief Operating Officer role. This allows UKAT to provide more support to more institutions in more ways, which we believe will continue to enable us to meet our mission. The momentum is building, and our community's appetite for growth and innovation has never been more vibrant.

Influencing Policy

UKAT is proud to contribute to the wider higher education sector and has been involved in several collaborative projects again this year. January saw the Higher Education Mental Health Implementation Taskforce publish a Competency Framework for Responding to Students in Distress, which UKAT was involved in developing. Recognising the important work personal tutors do to support students, we made the publication available at the annual conference. UKAT is also actively engaged in another of Professor Edward Peck's key initiatives, the Student Support Redesign project, in collaboration with Advance HE. This work reflects our ongoing commitment to enhancing the student experience and shaping innovative, inclusive support structures across the sector. We were also delighted to



contribute to Professor Peck's recent Roundtable event on Personal Academic Tutoring, sharing sector-wide insights and championing the vital role of academic advising in student success. Additionally, UKAT is working closely with national stakeholders on the development of the Disabled Students Commitment, reinforcing our dedication to equity and accessibility in higher education.

Enhancing Scholarship: The First Edition of WayPoint is Published

Following last year's announcement of the new reflective journal of student advising and development in tertiary education, WayPoint, we are delighted to report that the first edition was published in March 2025. WayPoint encourages submissions that link research to practice, highlight innovative pedagogic approaches, and promote community collaboration. Comprising editorials, opinion pieces, case studies, synthesis and application articles, research papers, and reviews, WayPoint is redefining the dissemination of knowledge and best practices within our field throughout Europe. The inaugural edition consisted of nine articles, which were contributed to by 14 authors in the UK, Netherlands, Denmark, and the USA. Of global interest, these articles have already been accessed more than 2700 times, with readers from 34 countries on six continents! We are already accepting submissions for the next issue and look forward to publishing on an ongoing basis.

Where Past Meets Future: Our Annual Conference Celebrates a Decade of Shaping Futures

Our fantastic community gathered at University College London in April to celebrate a decade of UKAT and consider how personal tutoring can create joyful learning and life experiences for staff and students. Our opening keynote, styled as a TV panel show and moderated by Colum Cronin, brought together UKAT Board members and guests to reflect on UKAT's evolution, the development of academic advising over the past decade, and strategies for addressing future challenges and supporting both students and the sector. In the closing keynote, Jenny Shaw from Unite Students asked delegates to consider compassion in advising and discussed the Advance HE Competency Framework for Responding to Students in Distress developed by the Higher Education Mental Health Implementation Taskforce. Both of these documents were made available to delegates. The gathering of over 200 delegates representing six nations became a vibrant tapestry of ideas and inspiration, forging new connections and sparking innovative collaborations. Energised by this success, we are setting our sights on the



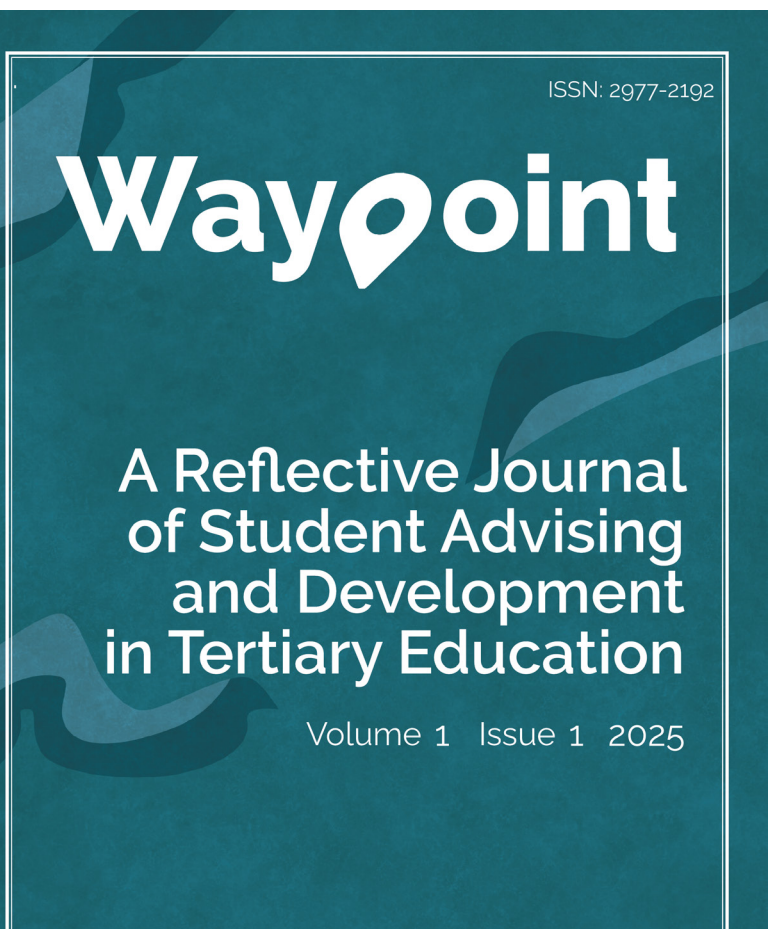
2026 conference at Manchester Metropolitan University, where we aim to surpass all expectations and welcome our most diverse and international cohort yet!

New Resource to Aid Personal Tutoring Enhancement

As an organisation that embodies collaboration and the sharing of ideas, we know that there is much to learn from others. Across the sector, several institutions are reviewing their advising and tutoring approaches and looking to other institutions for inspiration. That is why we have developed a library of advising and tutoring policies published by UK Universities. UKAT Members can access this from our resources site. We've done the searching, so they don't have to!

Collaborative Consultancy: Advancing Personal Tutoring Excellence

We are proud of our collaborative approach to supporting institutions to meet their goals; between our institutional accreditation scheme and other consultancy services, we have worked with several institutions to provide tailored support. This has included tailored training sessions, advice on designing personal tutoring frameworks, review of policies and sharing sector-wide insights. These institutions have shown a strong commitment to enhancing and achieving excellence in personal tutoring, and it is a privilege to support them along their journey.



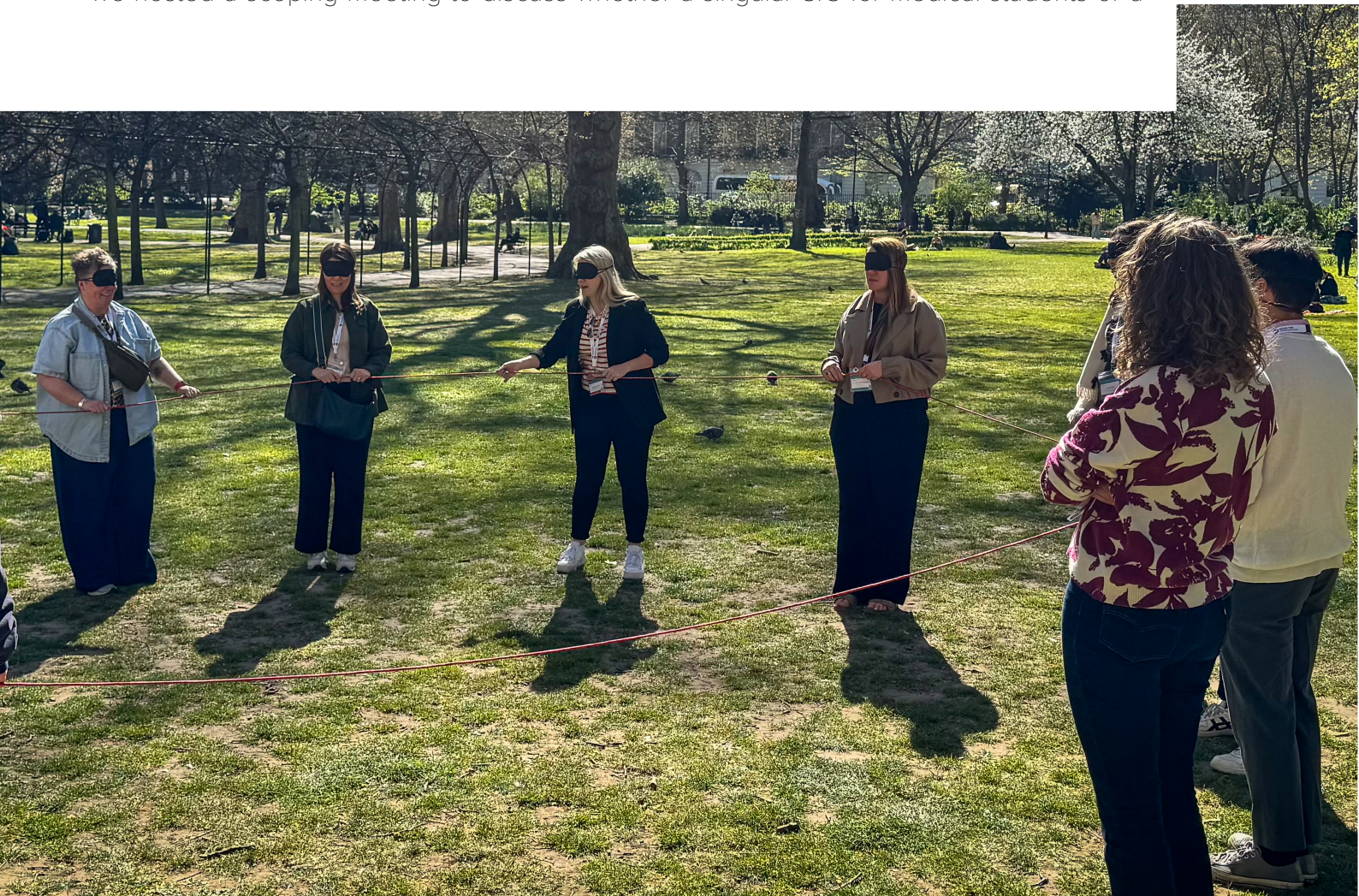
Main Achievements

Special Interest Groups

Our Special Interest Groups (SIGs) remain a cornerstone of our vibrant community, continuing to be a highly valued member benefit. These dynamic groups gather at least twice a year, bringing together professionals who share passions and expertise in specific aspects of personal tutoring. Through lively discussions and collaborative initiatives, SIGs champion UKAT's strategic priorities, exchange best practices, and actively enrich our collective resources and professional development offerings.

This year, we're thrilled to welcome two inspiring additions: the Senior Leaders Network — inviting sector leaders from within and beyond the UKAT membership — and the Mental Health and Wellbeing SIG. Each new community brings fresh perspectives, energy, and expertise, and we eagerly anticipate their positive contributions to the UKAT community. Together, our SIGs continue to foster innovation, connection, and excellence throughout our field.

Looking to the future, we're excited to share that we've answered the call to explore a brand-new Special Interest Group (SIG) focusing on advising medical students. Medical students face a formidable array of challenges: from immense cognitive pressure and persistent mental health concerns like anxiety, depression, and burnout, to spending extended periods on clinical placements far from familiar campus support networks. Advising these students requires an intricate understanding of their specific needs and often involves a web of advisors—some inside and some outside the university, not all of whom are versed in the nuances of academic regulations or available resources. Our conversations have revealed that these challenges aren't limited to medicine alone. Students in allied health professions like nursing, midwifery, physiotherapy, and veterinary and dental programmes face similar hurdles stemming from the existence of clinical placements. Fuelled by curiosity and a drive for impact, we hosted a scoping meeting to discuss whether a singular SIG for medical students or a



Main Achievements

broader community for all clinically focused disciplines would best serve our members. The enthusiasm and innovative ideas shared at this session were incredibly valuable. As we sift through suggestions and chart our course, we're energised by the prospect of launching a dynamic new SIG focused on the tutors' and students' unique voices and experiences in these fields.



Financial Review

The UK Advising and Tutoring association (UKAT) is a charitable trust and learned society representing scholars and practitioners of personal tutoring and academic advising in the UK higher education sector.

At the heart of our financial health are the membership fees, which are predominantly sourced from our partnerships with higher education institutions. This pivotal revenue stream is bolstered by the income generated through our comprehensive training programs and the accreditation of individual practitioners. Moreover, the annual conference emerges not just as a beacon of shared knowledge and innovation but also as a significant contributor to our financial surplus.

As a digitally-forward organization, UKAT prides itself on its strategic focus in developing cutting-edge digital infrastructure and automation. This commitment ensures that we provide an array of indispensable services with efficiency, powered by a lean yet highly specialized team. Our investment in people is profound, with a significant portion of our expenses dedicated to staff salaries. We've built our team with a deliberate emphasis on diversity in expertise, paying competitive salaries commensurate with the high standards of the UK higher education sector to attract and retain top talent.

In a strategic move this year, UKAT has ventured into the realm of financial investment by opening an interest-paying deposit account. This marks a significant step in our endeavour to enhance the management of our financial resources, aiming to secure and grow our funds wisely. Upholding our values, our financial assets, including our current and deposit accounts, are held by the Cooperative Bank. This choice reflects our commitment to supporting organisations that share our ethical views and offer exceptional services to small charities like ours.

This financial synopsis highlights UKAT's sound financial management and initiatives and underscores our continual growth and dedication to supporting the higher education sector. Our strategic financial decisions are integral to fostering a sustainable future for UKAT, enabling us to soar to new heights in training, accreditation, and beyond.

Financial Review

Receipts

		2024-25		2023-24
Membership	£	35,055	£	31,960
Conference	£	33,376	£	45,983
Consultancy	£	791	£	4,092
Sponsorship	£	5,000	£	3,700
Education and Training	£	49,220	£	43,080
Merchandise and Sales	£	350	£	320
Interest Earned	£	828	£	35
Sub total (Gross income for AR)	£	124,620	£	129,237

Payments

		2024-25		2023-24
Salaries	£	81,423	£	64,765
Pensions	£	19,893	£	12,791
Conference	£	20,835	£	18,951
Consulting	£	650	£	300
Travel	£	1,697	£	4,220
Insurance	£	429	£	208
IT & Software	£	9,134	£	4,631
Publicity and Marketing	£	1,256	£	-
Subscriptions	£	-	£	188
General Expenses	£	1,545	£	2,579
Exchange rate Adjustments	£	39	£	-
Bank Fees	£	41	£	22
Payment Processing Fees	£	766	£	824
Total Payments	£	£137,707	£	109,794
Net of receipts/(payments)	£	13,087	£	19,443
Transfer between funds		-		-
Cash funds last year end	£	124,571	£	105,128
Cash funds this year end	£	111,484	£	124,571

Assets and liabilities at the end of the period

	2024-25		2023-24	
Current Account	£	70,278	£	84,067
Deposit Account (Reserves)	£	40,863	£	40,035-
PayPal Account	£	345	£	411
Stripe Account	£		£	594
Total cash funds	£	111,486	£	124,572

Reserves Policy

The Charity Commission recognises that it is important for a charity to keep funds in reserve to strengthen the charity's resilience against drops in income or the demands of new initiatives.

UKAT is primarily funded by higher education institutions and receives most of its annual income in July – August and January – March. To ensure the sustainability of its operations and activities in a market sector facing significant financial challenges, UKAT's policy is to hold the equivalent of nine month's operating costs (75% of annual operating costs) in reserve. Operating costs include staff salaries, IT infrastructure costs, and general running costs. Reserves are held in a 35-day notice, interest-paying deposit account.

UKAT undertakes to fully comply with this reserve target over any three-year period. The financial reserves held by UKAT will be used to:

- maintain essential services and activities for UKAT's members and beneficiaries
- manage unforeseen financial difficulties

The Board of Trustees will review this policy at least annually to ensure its effectiveness in light of the changing financial climate and other risks. On behalf of the Board of Trustees, the Finance Committee will review the required reserves quarterly to ensure that they are adequate to fulfil our continuing obligations and advise the Board of Trustees of any changes required to the Reserves Policy.

At the end of the 2024-25 financial year, UKAT holds £41k in reserve, which represents 37% of the annual operating costs. It is the Board's intention to increase the reserves held over the next two years to enable UKAT to meet its reserve target of 75% of annual operating costs.

Declarations

The Trustees have considered the Charity Commission guidance on public benefit to satisfy themselves that UKAT’s activities meet the public benefit requirements. The Board of Trustees takes account of the public benefit guidance in considering proposals for the introduction of new activities, and changes to existing ones..

The Trustees declare that they have approved this Annual Report

Signed on behalf of the UKAT Trustees



Neil Bangs
Chair



Ann Bingham
Vice-Chair (Community Engagement)

Date 16 October 2025

UK Advising and Tutoring

 ukat.ac.uk

 hello@ukat.ac.uk



UKAT is a charity registered in England and Wales.
Charity Registration Number: 1185020



Receipts and payments accounts

CC16a

For the period
from

5/1/2024

To

4/30/2025

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Membership	35,055	-	-	35,055	31,960
Conference	33,376	-	-	33,376	45,983
Consultancy	791	-	-	791	4,092
Sponsorship	5,000	-	-	5,000	3,700
Education and Training	49,220	-	-	49,220	43,080
Merchandise and Sales	350	-	-	350	320
Interest Earned	828	-	-	828	35
Overpayments Received	-	-	-	-	67
Sub total (Gross income for AR)	124,620	-	-	124,620	129,237
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	124,620	-	-	124,620	129,237
A3 Payments					
Salaries	81,423	-	-	81,423	64,765
Pensions	19,893	-	-	19,893	12,791
Conference	20,835	-	-	20,835	18,951
Consulting	650	-	-	650	300
Travel	1,697	-	-	1,697	4,220
Insurance	429	-	-	429	208
IT & Software	9,134	-	-	9,134	4,631
Publicity & Marketing	1,256	-	-	1,256	-
Subscriptions	-	-	-	-	188
General Expenses	1,545	-	-	1,545	2,579
FX Loss	39	-	-	39	-
Bank Fees	41	-	-	41	22
Payment Processing Fees	766	-	-	766	824
Refunds Made	-	-	-	-	315
Sub total	137,707	-	-	137,707	109,794
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	137,707	-	-	137,707	109,794
Net of receipts/(payments)	- 13,087	-	-	- 13,087	19,443
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	124,571	-	-	124,571	105,128
Cash funds this year end	111,484	-	-	111,484	124,571

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Current Account	70,278	-	-
	Deposit Account	40,863	-	-
	PayPal Account	345	-	-
	Stripe Account	-	-	-
	Total cash funds	111,486	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

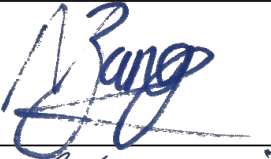

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature _____

Print Name _____

Date of approval _____

	Neil Bangs	10/16/2025
	Oscar van den Wijngaard	10/16/2025



Section A Independent Examiner's Report

**Report to the trustees/
members of** UK Advising and Tutoring (UKAT)

**On accounts for the year
ended** 30th April 2025 **Charity no
(if any)** 1185020

Set out on pages

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30 / 04 / 2025

**Responsibilities and
basis of report** As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent
examiner's statement**

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

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

Signed: *Sarah McConnell* **Date:** 11/19/2025

Name: Sarah McConnell

**Relevant professional
qualification(s) or body
(if any):** Member of Institute of Chartered Accountants in England and Wales (ICAEW)

Address: 56, Lewes Road

Haywards Heath

RH17 7SN

Section B

Disclosure

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

[Empty rectangular box for disclosure details]

UK ADVISING AND TUTORING

England & Wales - Charity number 1185020

Accounts



Annual Report

2023 - 2024




Students at the Heart

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Contact us

UK Advising and Tutoring

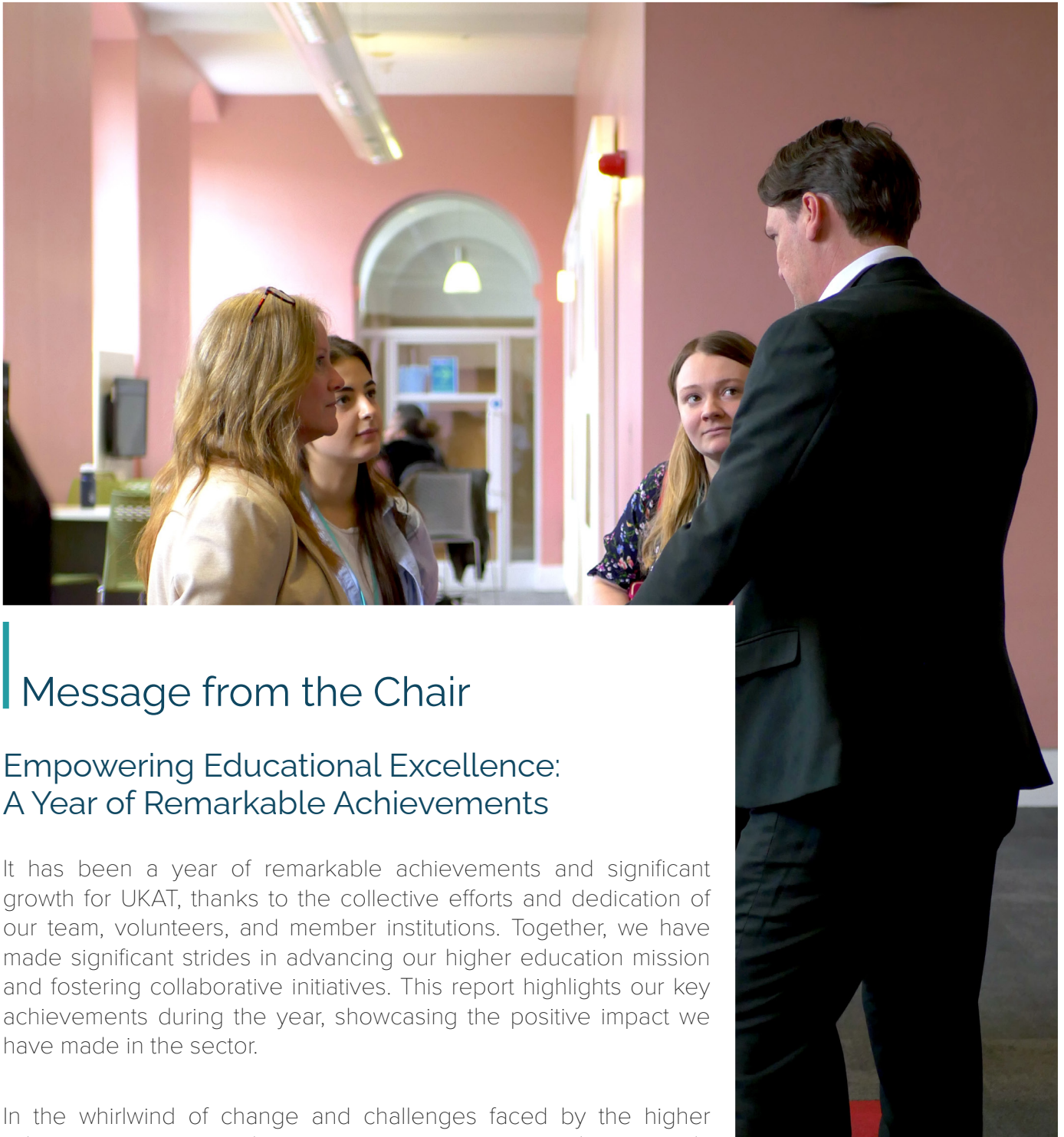
 ukat.ac.uk

 hello@ukat.ac.uk

Registered address:

York St John University, Lord Mayors Walk,
YORK YO31 7EX

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Charity Registration Number: 1185020



Message from the Chair

Empowering Educational Excellence: A Year of Remarkable Achievements

It has been a year of remarkable achievements and significant growth for UKAT, thanks to the collective efforts and dedication of our team, volunteers, and member institutions. Together, we have made significant strides in advancing our higher education mission and fostering collaborative initiatives. This report highlights our key achievements during the year, showcasing the positive impact we have made in the sector.

In the whirlwind of change and challenges faced by the higher education sector over the past year, our organisation has not only adapted but thrived, marking a year of remarkable achievements and profound impact on student support and academic advising across the UK and beyond. With a steadfast commitment to enhancing the quality of personal tutoring and broadening the horizons of professional development, we have meticulously crafted and launched pioneering schemes that stand as a testament to our dedication to educational advancement.

The Board of Trustees expresses heartfelt gratitude to our team, member institutions, dedicated volunteers, partners, and supporters who have contributed to the remarkable achievements of UKAT over the past year. We have made significant strides in advancing higher education, fostering collaboration, and driving positive change. Our focus has been on authentic collaboration, rigorous standards, and a steadfast commitment to excellence in every endeavour. As we reflect on the year's achievements, we are inspired by the progress made and excited for the opportunities that lie ahead, furthering our mission to enhance the higher education landscape. This year's achievements are more than just

milestones; they represent our unwavering commitment to enhancing the landscape of higher education through policy engagement, thought leadership, innovative resources, and community building. Together, we're not just facing the future; we're shaping it and look forward to creating a lasting impact in the years to come.

Neil Bangs,
UKAT Chair

Structure, Governance and Management

UKAT is a Charitable Incorporated Organisation, governed by a constitution, with a Board of Trustees elected by members of the charity.

Board of Trustees

Neil Bangs *Chair*

Susan Smith *Finance Committee Chair*

Dionne Barton

Ann Bingham *Vice-Chair (Community Engagement)*

Abigail Moriarty

Oscar van den Wijngaard *Scholarship*

Sarah Bosch *Vice-Chair (Professional Development)*

Michael Talbot *Publicity and Advocacy*

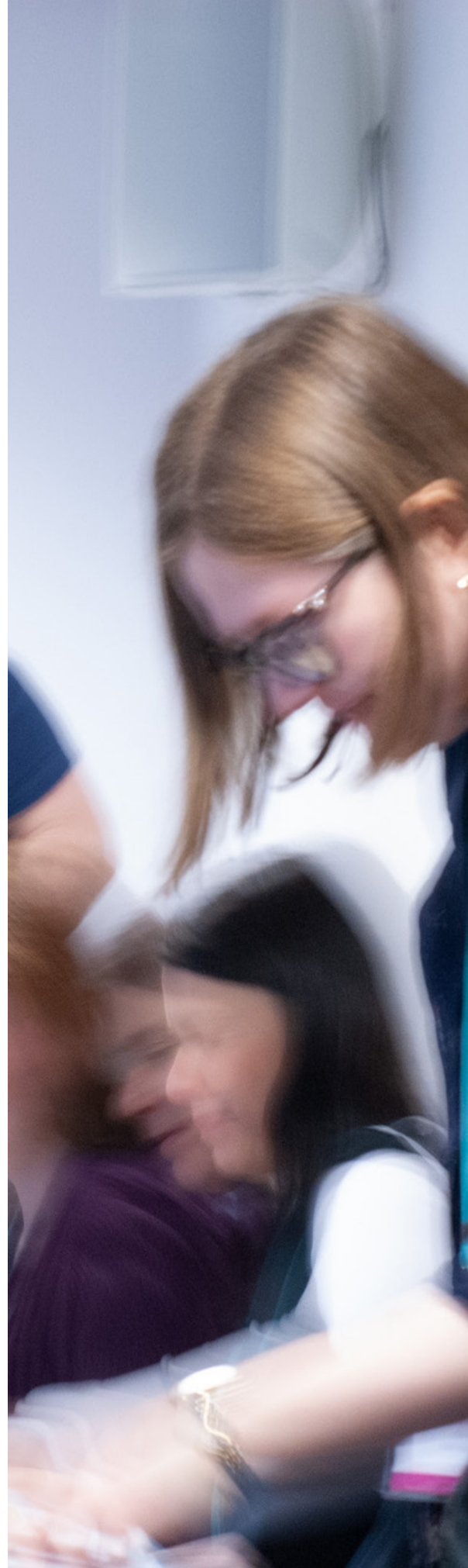
Josephine Gabi *Equity and Inclusion*

Chief Executive Officer

David Grey

UKAT is a registered member of the National Council for Voluntary Organisations (NCVO). Trustees are provided with access to, and asked to engage with, NCVO's Trustee training and charity governance guidance and resources.

UKAT has followed NCVO guidance, and adopted and adapted NCVO sample policies and procedures in defining its organisational structure and procedures.



Vision, Mission and Values

The UK Advising and Tutoring association (UKAT) is a charitable trust and learned society representing scholars and practitioners of personal tutoring and academic advising in the UK higher education sector.

Our vision

UKAT's vision is for every higher education student to experience effective personal tutoring and academic advising which personalises their learning and enables them to flourish.

Our mission

UKAT mission is to advance effective personal tutoring and academic advising, transforming advising practice so that every higher education student can experience inclusiveness, wellbeing and personal growth, leading them to flourish and succeed. We support the development of staff and students throughout the learning journey by sharing resources, practicing scholarly inquiry, promoting partnership, fostering community, and espousing excellence in personal tutoring and academic advising practice.

Objectives

The objects of the charity are to advance the education and success of Higher Education students through the provision of effective personal tutoring and academic advising.

Our values

Inclusive: UKAT is open, welcoming and accessible to all involved in supporting student success, including students themselves.

Collaborative: UKAT promotes partnerships across the higher sector, within institutions and with students, for the benefit of students, and for the benefit of the personal and professional development of advisors/tutors.

Listening: UKAT actively seeks the voice of students, advisors/tutors and institutions to inform thinking on current issues and to help our members in supporting their students and institutional missions.

Enabling: the UKAT community encourages and motivates advisors to improve their practice and work effectively with the diverse range of students they support.

Scholarly: UKAT seeks to advance advisor/tutor skills and practices through engagement with evidence-informed approaches.

Professional: UKAT seeks to recognise the importance of the advising/tutoring role, and to define the standards and values which underpin it, for the greater good of students, colleagues, institutions and higher education in general.

Student-Centred: Students are the reason why UKAT exists and are at the heart of everything that UKAT does.



Objectives and Activities



UKAT seeks to achieve its objectives by advancing the field of academic advising and personal tutoring and working with key stakeholders, including members, higher education institutions, their staff, and students, to enhance academic advising and personal tutoring practice. UKAT supports the sharing and dissemination of good practices through conferences, webinars, professional development activities, professional recognition, research, resources, articles, and networking.

UKAT views itself as a learning association and promotes a scholarly-informed approach to personal tutoring/academic advising to its members, as well as the adoption of high-impact, evidence-informed practices by individual educators and their institutions to enhance student outcomes. UKAT encourages all personal tutors/academic advisors to engage with and contribute to the scholarship of the field to enhance their own practice and develop more effective practice across the whole higher education community. UKAT also supports, promotes, and facilitates the dissemination of research into personal tutoring and academic advising to enhance the publicly available evidence base of effective practices and encourage all practitioners to adopt a scholarly-informed approach.

UKAT provides a range of consultancy, professional development and training for personal tutors and academic advisors through webinars, online courses, networking opportunities and practice-sharing events.

The two primary professional development activities offered by UKAT are a freely available monthly webinar series open to anyone and the UKAT Annual conference. UKAT partners with LVSA, the Dutch study advising association, to provide two events each year that are freely available to members of the UK and European higher education communities.

UKAT offers advice and guidance to higher education institutions seeking to improve the provision of personal tutoring and academic advising processes for their students.

It does this through:

- Publications and guidance documents, including a professional standards framework
- Freely available educational resources for higher education providers and individual personal tutors/academic advisors to use in supporting their students
- A structured curriculum of online professional development courses and in-person workshops which available to both members and non-members
- Consulting directly with individual higher education institutions

Main Achievements

Institutional Excellence: The Launch of Our Accreditation Scheme

In a groundbreaking initiative, we successfully initiated our Institutional Accreditation Scheme, setting a new standard for excellence in the higher education (HE) sector. Following thorough consultations with six universities, we embarked on a pilot scheme with three pioneering institutions: the University of East London, the University of Greenwich, and the University of Sunderland. This pilot is the first step in creating a comprehensive accreditation program designed to foster an evidence-informed, continual enhancement of personal tutoring practices. Our goal is to empower institutions to invest in their staff, delivering quality, effective personal tutoring that significantly uplifts student outcomes. This scheme signifies a developmental collaboration in which we leverage our extensive resources and expertise to assist institutions in refining their personal tutoring processes to align with our accreditation principles and the forthcoming UKAT Personal Tutoring Charter. Anticipating the first accreditation submission in early autumn 2024, we are gearing up to welcome more institutions starting September 2024. A dedicated working group—comprising members from the pilot institutions and a diverse range of HE institutions—has meticulously outlined the accreditation criteria, application, and assessment processes. Accredited institutions will proudly bear a charter mark, symbolising their commitment to excellence in personal tutoring and student support for a period of five years.

Celebrating Professional Excellence: The Professional Recognition Scheme

Our Professional Recognition Scheme has witnessed unprecedented growth, with over 540 individuals from 45 universities drawn to its promise of nurturing and acknowledging educational excellence at an individual level. This year alone, we have celebrated the achievement of 150 distinguished awards across varying levels of recognition. The scheme's structured framework cultivates a reflective and developmental ethos among practitioners, fostering pedagogical innovation for the benefit of our wider student community. The surge in interest from both UKAT's existing and potential institutional members underscores the scheme's pivotal role in enhancing educational quality. Enhanced support mechanisms, including revamped applicant handbooks, innovative self-assessment tools, and immersive Recognition Retreats offering dedicated support and mentorship, have significantly bolstered the applicant journey. Notably, our optimised assessment process now boasts a remarkable reduction in decision wait times, alongside a compassionate extension policy and rigorous assessor management strategies, ensuring fairness and consistency in every assessment. Through our monthly assessment panels and regular assessor training, we continue to ensure the highest standards of fairness and consistency in our evaluations.



Fostering Professional Growth: The Professional Development Curriculum

Our Professional Development Curriculum has reached new heights of engagement, offering 12 enriching online modules to staff at member institutions. With 523 module registrations emanating from 48 institutions, there is a clear demand for professional upskilling. Designed to support continuous learning and development, these modules cater to diverse needs and interests within the HE community, underlining our commitment to advancing educational practices. Additional modules are currently under development, with plans to expand this offering, reflecting our dedication to meeting the evolving needs of educational professionals.

Elevating Our Influence in Higher Education Policy

Our commitment to shaping policies that influence student support has never been stronger. This year, we've deepened our involvement in pivotal networks and task forces, most notably with the Office for Students'/Student Champion's HE Mental Health Implementation Taskforce. Our collaborative efforts have led to the development of a comprehensive framework outlining essential skills and competencies all student-facing staff should possess. This initiative aims to foster mentally healthy university environments and empower staff to effectively support students with diverse mental health needs. Additionally, our advocacy for the Disabled Students Commitment is championing unprecedented inclusivity across UK higher education institutions, ensuring that no student's potential is hindered by disability.

Launching WayPoint: A Landmark in Academic Publishing

In an exciting leap forward, we announced the birth of WayPoint, a European Journal of Personal Tutoring and Academic Advising Practice. Born out of a vision first conceived in 2017, WayPoint has finally taken flight, thanks to the maturation of our organization and the collaborative spirit of our colleagues across Europe, including our partners at LVSA in the Netherlands and the University of Turku in Finland. WayPoint stands as an inspiration for professionals eager to bridge scholarship with practical application in personal tutoring and academic advising. Launched at our 2024 Annual Conference and looking forward to its



inaugural edition before our 10th-anniversary conference in 2025, WayPoint is set to revolutionize how knowledge and practices are shared in our field across Europe.

Hosting an Unprecedented Annual Conference

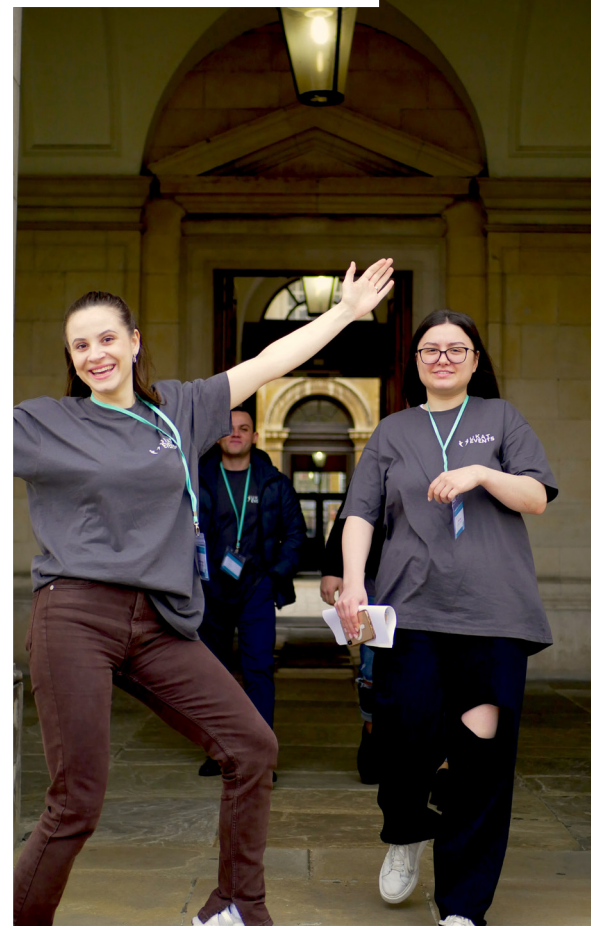
Our most recent Annual Conference marked a significant milestone, becoming the largest gathering in our history with 246 delegates from across the globe. Hosted at the University of Greenwich, the conference became a melting pot of ideas, innovations, and inspirations from the UK, Europe, and as far afield as Australia, Canada, the UAE, and the US. As we set our sights on the 2025 Annual Conference in partnership with University College London, we're fuelled by the anticipation of celebrating a decade of driving change and excellence in higher education.

Developing Resources to Revolutionize Personal Tutoring

We've broadened our suite of resources, offering impactful tools like the *Advising the Student Journey* game and the *Because of My Tutor* poster campaign.

The *Advising the Student Journey* game is a dynamic and engaging card-based activity that fosters collaboration among all educational stakeholders. This unique tool encourages a deep dive into the student experience, allowing participants to view the educational journey through the students' eyes. Its thoughtful design prompts discussions on student needs, paving the way for the development of structured personal tutoring programs which ensure meaningful interactions, guiding students effectively at crucial points on their academic journey.

Our *Because of My Tutor* poster campaign highlights the pivotal role of personal tutoring. By offering a collection of 36 customisable A3 posters, institutions now have a powerful tool to showcase real-life testimonials of students whose academic and personal outcomes



Main Achievements

have significantly benefited from their interactions with personal tutors. Each poster serves as a vivid testament to the transformative impact of personal tutoring, featuring genuine student stories that not only celebrate their achievements but also highlight the indispensable value personal tutors add to the educational journey. The posters can be customised to use an institution's brand and include additional stories and photographs of their own students

Expanding Our Webinar Series

Our *Tutoring Matters* webinar series has continued to capture the interest of educators worldwide, with topics this year drawing audiences of up to 300 participants. Moving onto the Microsoft Teams platform has furthered our reach, enabling us to connect, educate, and inspire a broader community of academic professionals. UKAT now has an archive of over 100 hours of webinar recordings which is available to UKAT members.

Special Interest Groups

In a remarkable display of innovation and collaboration, our Special Interest Groups (SIGs) have, over the past year, not only expanded in number but also in influence, marking a significant stride in the realm of personal tutoring. With the welcome addition of the *Evaluation of Personal Tutoring* SIG, and the consideration of new groups targeted at senior leaders and peer support, our network of SIGs has blossomed into vibrant micro-communities. Each group, deeply rooted in specific elements of personal tutoring, has become a cornerstone for fostering collaboration and igniting knowledge exchange within the UKAT membership ecosystem.



These powerhouse collectives have been pivotal in propelling the advancement of cutting-edge ideas and nurturing the development of evidence-based practices in higher education. Through their dedication, we've seen the creation of influential UKAT Curriculum modules—ranging from *Decoding Cross-Cultural Communication* to *Supporting Postgraduate Students*—and the delivery of engaging webinars that prompt much-needed discussion, such as the thought-provoking and highly popular *Why Don't They Attend?* webinar delivered by the *Student Engagement SIG*.

But it doesn't stop there. Our SIGs have leapt beyond dialogue, initiating cross-institution research projects, contributing to esteemed peer-reviewed journal articles, and taking centre stage with their findings at conferences. This vibrant activity has been recognised and supported by the decision of the Board of Trustees to begin awarding small-scale grant funding to fuel these important endeavours further. Such backing ensures our community continues to lead the way in developing and sharing personal tutoring practices that are theoretical and proven in action.

Consultancy Services: Working Together to Enhance Practice

UKAT's consultancy services continue to provide tailored support and robust partnerships with higher education providers. By engaging closely with six higher education institutions, our efforts have propelled these institutions forward, enhancing their personal tutoring frameworks and enriching the skills of their staff. Through bespoke training workshops, provision of sectoral insights, design guidance on personal tutoring systems, and the critical review of policies, we've laid the groundwork for transformative approaches to personal tutoring across the sector.



Financial Review

The UK Advising and Tutoring association (UKAT) is a charitable trust and learned society representing scholars and practitioners of personal tutoring and academic advising in the UK higher education sector.

Financial Review

At the heart of our financial health are the membership fees, which are predominantly sourced from our partnerships with higher education institutions. This pivotal revenue stream is bolstered by the income generated through our comprehensive training programs and the accreditation of individual practitioners. Moreover, the annual conference emerges not just as a beacon of shared knowledge and innovation but also as a significant contributor to our financial surplus.

As a digitally-forward organization, UKAT prides itself on its strategic focus in developing cutting-edge digital infrastructure and automation. This commitment ensures that we provide an array of indispensable services with efficiency, powered by a lean yet highly specialized team. Our investment in people is profound, with a significant portion of our expenses dedicated to staff salaries. We've built our team with a deliberate emphasis on diversity in expertise, paying competitive salaries commensurate with the high standards of the UK higher education sector to attract and retain top talent.

In a strategic move this year, UKAT has ventured into the realm of financial investment by opening an interest-paying deposit account. This marks a significant step in our endeavour to enhance the management of our financial resources, aiming to secure and grow our funds wisely. Upholding our values, our financial assets, including our current and deposit accounts, are held by the Cooperative Bank. This choice reflects our commitment to supporting organisations that share our ethical views and offer exceptional services to small charities like ours.

This financial synopsis highlights UKAT's sound financial management and initiatives and underscores our continual growth and dedication to supporting the higher education sector. Our strategic financial decisions are integral to fostering a sustainable future for UKAT, enabling us to soar to new heights in training, accreditation, and beyond.

Financial Review

Receipts

	2023-24	2022-23
Membership	31,960	49,645
Conference	45,983	29,434
Consultancy	4,092	8,519
Sponsorship	3,700	3,000
Education and Training	43,080	16,490
Merchandise and Sales	320	640
Interest Earned	35	-
Overpayments Received	67	315
Sub total (Gross income for AR)	129,237	108,043

Payments

	2024	2023
Salaries	64,765	47,035
Pensions	12,791	10,734
Conference	18,951	11,052
Consulting	300	-
Travel	4,220	2,013
Insurance	208	208
Cost of Merchandise	-	-
IT & Software	4,631	3,599
Subscriptions	188	124
General Expenses	2,579	936
Bank Fees	22	8
Payment Processing Fees	824	691
Refunds Made	315	-
Total Payments	109,794	76,400
Net of receipts/(payments)	19,443	31,643
Transfer between funds	-	-
Cash funds last year end	105,128	73,485
Cash funds this year end	124,571	105,129

Assets and liabilities at the end of the period

	2023-24	2022-23
Current Account	84,067	104,463
Deposit Account (Reserves)	40,035	-
PayPal Account	411	232
Stripe Account	59	434
Total cash funds	124,572	105,129

Reserves Policy

The Charity Commission recognises that it is important for a charity to keep funds in reserve to strengthen the charity's resilience against drops in income or the demands of new initiatives.

UKAT is primarily funded by higher education institutions and receives most of its annual income in July – August and January – March. To ensure the sustainability of its operations and activities in a market sector facing significant financial challenges, UKAT's policy is to hold the equivalent of nine month's operating costs (75% of annual operating costs) in reserve. Operating costs include staff salaries, IT infrastructure costs, and general running costs. Reserves are held in a 35-day notice, interest-paying deposit account.

UKAT undertakes to fully comply with this reserve target over any three-year period. The financial reserves held by UKAT will be used to:

- maintain essential services and activities for UKAT's members and beneficiaries
- manage unforeseen financial difficulties

The Board of Trustees will review this policy at least annually to ensure its effectiveness in light of the changing financial climate and other risks. On behalf of the Board of Trustees, the Finance Committee will review the required reserves quarterly to ensure that they are adequate to fulfil our continuing obligations and advise the Board of Trustees of any changes required to the Reserves Policy.

At the end of the 2023-24 financial year, UKAT holds £40k in reserve, which represents 37% of the annual operating costs. It is the Board's intention to increase the reserves held over the next two years to enable UKAT to meet its reserve target of 75% of annual operating costs.

Declarations

The Trustees have considered the Charity Commission guidance on public benefit to satisfy themselves that UKAT’s activities meet the public benefit requirements. The Board of Trustees takes account of the public benefit guidance in considering proposals for the introduction of new activities, and changes to existing ones..

The Trustees declare that they have approved this Annual Report

Signed on behalf of the UKAT Trustees



Neil Bangs
Chair



Ann Bingham
Vice-Chair (Community Engagement)

Date 10 October 2024

UK Advising and Tutoring

 ukat.ac.uk

 hello@ukat.ac.uk



UKAT is a charity registered in England and Wales.
Charity Registration Number: 1185020



Receipts and payments accounts

CC16a

For the period
from

5/1/2023

To

4/30/2024

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Membership	31,960	-	-	31,960	49,645
Conference	45,983	-	-	45,983	29,434
Consultancy	4,092	-	-	4,092	8,519
Sponsorship	3,700	-	-	3,700	3,000
Education and Training	43,080	-	-	43,080	16,490
Merchandise and Sales	320	-	-	320	640
Interest Earned	35	-	-	35	-
Overpayments Received	67	-	-	67	315
Sub total(Gross income for AR)	129,237	-	-	129,237	108,043
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	129,237	-	-	129,237	108,043
A3 Payments					
Salaries	64,765	-	-	64,765	47,035
Pensions	12,791	-	-	12,791	10,734
Conference	18,951	-	-	18,951	11,052
Consulting	300	-	-	300	-
Travel	4,220	-	-	4,220	2,013
Insurance	208	-	-	208	208
Cost of Merchandise	-	-	-	-	-
IT & Software	4,631	-	-	4,631	3,599
Subscriptions	188	-	-	188	124
General Expenses	2,579	-	-	2,579	936
Bank Fees	22	-	-	22	8
Payment Processing Fees	824	-	-	824	691
Refunds Made	315	-	-	315	-
Sub total	109,794	-	-	109,794	76,400
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	109,794	-	-	109,794	76,400
Net of receipts/(payments)	19,443	-	-	19,443	31,643
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	105,128	-	-	105,128	73,485
Cash funds this year end	124,571	-	-	124,571	105,128

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Current Account	84,067	-	-
	Deposit Account	40,035	-	-
	PayPal Account	411	-	-
	Stripe Account	59	-	-
	Total cash funds	124,572	-	-
(agree balances with receipts and payments account(s))		Agreement Error	OK	OK

	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature _____

Print Name

Date of approval

	Neil Bangs	10/10/2024
#VALUE! #VALUE!	Ann Bingham	10/10/2024



Section A Independent Examiner's Report

**Report to the trustees/
members of** UK Advising and Tutoring (UKAT)

**On accounts for the year
ended** 30th April 2024 **Charity no
(if any)** 1185020

Set out on pages

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30 / 04 / 2024

**Responsibilities and
basis of report** As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent
examiner's statement**

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

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

Signed:

Date: 8th October 2024

Name: Sarah McConnell

**Relevant professional
qualification(s) or body
(if any):** Member of Institute of Chartered Accountants in England and Wales (ICAEW)

Address: 56, Lewes Road
Haywards Heath
RH17 7SN



Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

UK ADVISING AND TUTORING

England & Wales - Charity number 1185020

Accounts



Trustees' Annual Report for the period									
From		Period start date			To		Period end date		
		1	5	2022			30	4	2023

Section A Reference and administration details

Charity name

Other names charity is known by

Registered charity number (if any)

Charity's principal address

York St John University	
Lord Mayor's Walk	
YORK	
Postcode	YO31 7EX

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Neil Gordon Bangs	Chair		Members
2	Susan Anne Smith	Finance Committee Chair		Members
3	Dionne Elizabeth Barton			Members
4	Ann Lesley Bingham	Vice-Chair (Community Engagement)		Members
5	Oscar van den Wijngaard			Members
6	Abigail Moriarty			Members
7	Sarah Churchill	Vice-Chair (Professional Development)	From 8/7/2022 onwards	Members
8				
9				
10				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

David Grey

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Elected by Charity Members

Additional governance issues (Optional information)

<p>You may choose to include additional information, where relevant, about:</p> <ul style="list-style-type: none"> • policies and procedures adopted for the induction and training of trustees; • the charity's organisational structure and any wider network with which the charity works; • relationship with any related parties; • trustees' consideration of major risks and the system and procedures to manage them. 	<p>UKAT is a registered member of the National Council for Voluntary Organisations (NCVO). Trustees are provided with access to, and asked to engage with, NCVO's Trustee training and charity governance guidance and resources.</p> <p>UKAT has followed NCVO guidance, and adopted and adopted NCVO sample policies and procedures in defining its organisational structure and procedures</p>
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Summary of the objects of the charity set out in its governing document

The objects of the charity are to advance the education and success of Higher Education students through the provision of effective personal tutoring and academic advising.

UKAT seeks to achieve its objectives through advancing the field of academic advising and personal tutoring, and working with key stakeholders including members, higher education institutions and their staff, and students, to enhance academic advising and personal tutoring practice. UKAT supports the sharing and dissemination of good practice, through conferences, webinars, professional development activities, professional recognition, research, resources, articles, and networking.

UKAT views itself as a learning association and promotes a scholarly-informed approach to personal tutoring/academic advising to its members, and the adoption of high-impact, evidence-informed practices by individual educators and their institutions to enhance student outcomes. UKAT encourages all personal tutors/academic advisors to engage with, and contribute to, the scholarship of the field as a means of enhancing their own practice and developing more effective practice across the whole higher education community. UKAT also supports, promotes and facilitates the dissemination of research into personal tutoring and academic advising, to enhance the publicly-available evidence base of effective practices and to encourage all practitioners to adopt a scholarly-informed approach.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

UKAT provides a range of consultancy, professional development and training for personal tutors and academic advisors through webinars, online courses, networking opportunities and practice sharing events. The two primary professional development activities offered by UKAT are a freely available monthly webinar series open to anyone, and the UKAT Annual conference. UKAT partners with LVSA, the Dutch study advising association to provide two events each year which are freely available to members of the UK and European higher education communities.

UKAT offers advice and guidance to higher education institutions seeking to improve the provision of personal tutoring and academic advising processes for their students. It does this through:

- Publications and guidance documents, including a professional standards framework
- Freely available educational resources for higher education providers and individual personal tutors/academic advisors to use in supporting their students
- A structured Curriculum of online professional development courses and in-person workshops which available to both members and non-members
- Consulting directly with individual higher education institutions

The Trustees have considered the Charity Commission guidance on public benefit to satisfy themselves that UKAT's activities meet the public benefit requirements. The Board of Trustees takes account of the public benefit guidance in considering proposals for the introduction of new activities, and changes to existing ones.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

UKAT employees one member of full-time staff (the CEO) and two part-time staff (a Project & Publicity Officer and a Business Development Manager). Apart from the contribution of these staff, all the activities of UKAT are undertaken by experienced volunteers who are employed within UK or global higher education settings.

UKAT does not currently award grants.

Summary of the main achievements of the charity during the year

It has been a year of remarkable achievements and significant growth for UKAT, thanks to the collective efforts and dedication of our team, volunteers, and member institutions. Together, we have made significant strides in advancing our higher education mission and fostering collaborative initiatives. This report highlights our key achievements during the year, showcasing the positive impact we have made in the sector.

1. Successful In-person Annual Conference: One of the highlights of the year was the highly successful in-person UKAT Annual Conference, hosted by Swansea University. This is the first time since the pandemic that the Annual Conference has been held in-person. The event brought together educators, professionals and thought leaders from across the higher education landscape. It served as a platform for meaningful discussions, knowledge sharing, and networking opportunities. The conference received overwhelmingly positive feedback and provided a valuable forum for addressing emerging challenges in and identifying innovative solutions.

2. Employment of Two Part-time Employees: With a focus on bolstering our organizational capacity, we have employed two part-time employees. These dedicated individuals have played crucial roles in supporting our day-to-day operations, facilitating effective communication, and driving our initiatives forward. Their expertise and commitment have strengthened our ability to provide high-quality services and support to our member institutions and the wider higher education community.

3. Popular Monthly Webinar Series: Our free monthly webinar series has grown in popularity throughout the year, and we have changed the hosting platform we use to enable us to make them available to larger audiences. These webinars have become a hub for knowledge exchange, best practices, and professional development within the higher education sector. Renowned experts and practitioners have shared their insights, addressing key issues and emerging trends. The consistently positive feedback received from attendees demonstrates the value of these webinars and the importance of providing accessible and relevant content to our community.

4. Expansion of Member Institutions: We are thrilled to announce that our network of member institutions has grown significantly during the year. We now proudly serve 42 institutions, each bringing unique perspectives and expertise to our community. This expansion reflects the growing recognition of our organization as a trusted partner and resource within the higher education landscape. We remain committed to fostering collaboration, enabling sharing of best practices, and driving positive change across these diverse institutions, and the wider higher education community.

5. Increased Turnover: UKAT's financial stability and growth are evident through the increase in our annual turnover to £108K, and the first time our turnover has exceeded £100K. This achievement is a result of strategic planning, effective resource allocation, and the dedication of our team. The increased turnover enables us to further invest in initiatives and resources that directly benefit our member institutions and the broader higher education community. It is a strong indicator of our UKAT's continued progress and ability to deliver impact.

6. Development of Special Interest Groups and Research Projects: The establishment of special interest groups (SIGs) has been a significant step forward in enhancing collaboration and knowledge sharing within eight specific areas of interest. These groups have developed valuable resources, facilitated meaningful discussions, and initiated cross-institution research projects. By bringing together experts and practitioners, we have accelerated the advancement of innovative ideas and are contributing to the development of evidence-based practices in higher education.

7. Widely Adopted Online Curriculum: Our online curriculum has witnessed substantial growth and adoption throughout the year. Introduced in January 2022, over 20 institutions have now embraced this innovative learning platform for personal tutors, recognizing its potential for staff development which in turn enhances educational experiences and improve student outcomes. By offering flexible and accessible resources, we are empowering educators to embrace digital learning and adapt to the evolving needs of their students. The growing adoption of our online curriculum reflects its effectiveness and impact on the higher education community.

8. Impactful Professional Recognition Scheme: Over the past year, our Professional Recognition scheme has continued to expand its reach, providing a platform for individual practitioners in the higher education sector to showcase their expertise, dedication, and commitment to personal tutoring/academic advising. The scheme is now operational at over 45 universities, and achievement of recognition through the scheme has been built into the academic staff promotion criteria of several institutions. This signifies the trust and recognition our program has gained among academic institutions and reflecting its growing acceptance and value within the sector. Almost 450 applicants have now engaged with the scheme, showcasing its resonance with practitioners aspiring for ongoing professional growth and development. The scheme offers a structured framework that encourages individuals to reflect upon their practice and pursue targeted professional development opportunities. Through these endeavours, practitioners can enhance their knowledge, skills, and pedagogical approaches, ultimately benefitting the broader student community.

The Board of Trustees expresses heartfelt gratitude to our team, member institutions, dedicated volunteers, partners, and supporters who have contributed to the remarkable achievements of UKAT over the past year. Together, we have made significant strides in advancing higher education, fostering collaboration, and driving positive change. We look forward to continuing this journey, creating a lasting impact in the years to come.

Brief statement of the charity's policy on reserves

UKAT does not currently have a reserves policy. The development of a reserves policy remains an ongoing item of work for the Finance Committee, on behalf of the Board of Trustees.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

UKAT has been engaged by an Irish university on several occasions during this, and previous, reporting periods. A portion of the fee paid to UKAT has been retained by the Irish Revenue as Professional Services Withholding Tax and can be reclaimed by UKAT on production of a certificate of tax residency in the UK. UKAT has attempted to obtain such a certificate from HMRC but it appears that, despite submission of all the necessary paperwork, HMRC did not complete UKAT's tax registration which was submitted in February 2020. UKAT has applied again in 2022 to register with HMRC for tax purposes again but no response to that application has yet been received. The organisation will continue to pursue tax registration with HMRC. Once registration is complete, we shall apply for the certificate of tax residency and reclaim the tax due to us from the Irish Revenue.

Section F

Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

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Full name(s)

Neil Gordon Bangs	Ann Lesley Bingham
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Position (eg Secretary, Chair, etc)

Chair	Vice-Chair (Community Engagement)
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Date

5 July 2023

5 July 2023



Receipts and payments accounts

For the period from	5/1/2022	To	4/30/2023
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Membership	49,645	-	-	49,645	40,505
Conference	29,434	-	-	29,434	16,594
Consultancy	8,519	-	-	8,519	10,257
Sponsorship	3,000	-	-	3,000	2,000
Education and Training	16,490	-	-	16,490	9,405
Merchandise and Sales	640	-	-	640	-
Overpayments Received	315	-	-	315	1,178
Sub total (Gross income for AR)	108,043	-	-	108,043	79,939
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	108,043	-	-	108,043	79,939
A3 Payments					
Salaries	47,035	-	-	47,035	41,759
Pensions	10,734	-	-	10,734	10,120
Conference	11,052	-	-	11,052	720
Consulting	-	-	-	-	1,590
Travel	2,013	-	-	2,013	435
Insurance	208	-	-	208	208
Cost of Merchandise	-	-	-	-	420
IT & Software	3,599	-	-	3,599	9,640
Subscriptions	124	-	-	124	180
General Expenses	936	-	-	936	663
Bank Fees	8	-	-	8	17
Payment Processing Fees	691	-	-	691	550
Refunds Made	-	-	-	-	-
Sub total	76,400	-	-	76,400	66,302
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	76,400	-	-	76,400	66,302
Net of receipts/(payments)	31,643	-	-	31,643	13,637
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	73,485	-	-	73,485	59,848
Cash funds this year end	105,128	-	-	105,128	73,485

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


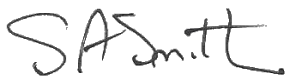
Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Current Account	104,463	-	-
	PayPal Account	232	-	-
	Stripe Account	434	-	-
	Total cash funds	105,129	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK
B2 Other monetary assets	Details	to nearest £	to nearest £	to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature _____

Print Name

Date of approval

	Neil Gordon Bangs	7/28/2023
	Susan Smith	7/28/2023



Section A Independent Examiner's Report

**Report to the trustees/
members of** UK Advising and Tutoring (UKAT)

**On accounts for the year
ended** 30th April 2023 **Charity no
(if any)** 1185020

Set out on pages

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30 / 04 / 2023

**Responsibilities and
basis of report** As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent
examiner's statement**

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

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

Signed:

Date: 9th October 2023

Name: Sarah McConnell

	Relevant professional qualification(s) or body (if any):	Member of Institute of Chartered Accountants in England and Wales (ICAEW)
	Address:	56, Lewes Road
		Haywards Heath
		RH17 7SN

Section B Disclosure

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

A large, empty rectangular box with a thin black border, occupying the majority of the page's width and height. It is intended for the user to provide details as requested in the text to its left.

UK ADVISING AND TUTORING

England & Wales - Charity number 1185020

Accounts



Trustees' Annual Report for the period							
		Period start date			Period end date		
From	1	5	2021	To	30	4	2022

Section A Reference and administration details

Charity name UK Advising and Tutoring

Other names charity is known by UKAT

Registered charity number (if any) 1185020

Charity's principal address

York St John University	
Lord Mayor's Walk	
YORK	
Postcode	YO31 7EX

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	David John Lochtie	Chair		Members
2	Susan Anne Smith			Members
3	Dionne Elizabeth Barton			Members
4	Ann Lesley Bingham			Members
5	Oscar van den Wijngaard			Members
6	Neil Gordon Bangs		8 September 2021 -	Members
7	Abigail Moriarty			Members
8				
9				
10				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

David Grey

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Elected by Charity Members

Additional governance issues (Optional information)

<p>You may choose to include additional information, where relevant, about:</p> <ul style="list-style-type: none"> • policies and procedures adopted for the induction and training of trustees; • the charity's organisational structure and any wider network with which the charity works; • relationship with any related parties; • trustees' consideration of major risks and the system and procedures to manage them. 	<p>UKAT is allied to <i>NACADA, the Global Community for Academic Advising</i>, a US-based non-profit organisation which supports the global higher education community, and which has similar objectives to those of UKAT.</p> <p>UKAT is a registered member of the National Council for Voluntary Organisations (NCVO). Trustees are provided with access to, and asked to engage with, NCVO's Trustee training and charity governance guidance and resources.</p> <p>UKAT has followed NCVO guidance, and adopted and adopted NCVO sample policies and procedures in defining its organisational structure and procedures</p>
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Summary of the objects of the charity set out in its governing document

The objects of the charity are to advance the education and success of Higher Education students through the provision of effective personal tutoring and academic advising.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

UKAT seeks to achieve its objectives through advancing the field of academic advising and personal tutoring, and working with key stakeholders including members, higher education institutions and their staff, and students, to enhance academic advising and personal tutoring practice. UKAT supports the sharing and dissemination of good practice, through conferences, webinars, professional development activities, professional recognition, research, resources, articles, and networking.

UKAT views itself as a learning association and promotes a scholarly-informed approach to personal tutoring/academic advising to its members, and the adoption of high-impact, evidence-informed practices by individual educators and their institutions to enhance student outcomes. UKAT encourages all personal tutors/academic advisors to engage with, and contribute to, the scholarship of the field as a means of enhancing their own practice and developing more effective practice across the whole higher education community. UKAT also supports, promotes and facilitates the dissemination of research into personal tutoring and academic advising, to enhance the publicly-available evidence base of effective practices and to encourage all practitioners to adopt a scholarly-informed approach.

UKAT provides a range of consultancy, professional development and training for personal tutors and academic advisors through webinars, online courses, networking opportunities and practice sharing events. The two primary professional development activities offered by UKAT are a freely available monthly webinar series open to anyone, and the UKAT Annual conference. UKAT partners with LVSA, the Dutch study advising association to provide two events each year which are freely available to members of the UK and European higher education communities.

UKAT offers advice and guidance to higher education institutions seeking to improve the provision of personal tutoring and academic advising processes for their students. It does this through:

- Publications and guidance documents, including a professional standards framework
- Freely available educational resources for higher education providers and individual personal tutors/academic advisors to use in supporting their students
- A structured Curriculum of online professional development courses and in-person workshops which available to both members and non-members
- Consulting directly with individual higher education institutions

The Trustees have considered the Charity Commission guidance on public benefit to satisfy themselves that UKAT's activities meet the public benefit requirements. The Board of Trustees takes account of the public benefit guidance in considering proposals for the introduction of new activities, and changes to existing ones.

Additional details of objectives and activities (Optional information)

UKAT employees one member of staff (the CEO). Apart from the contribution of the CEO, all the activities of UKAT are undertaken by experienced volunteers who are employed within UK or global higher education settings.

UKAT does not currently award grants.

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

The past year has seen continued growth in UKAT activities and membership, and demand for support with this important aspect of higher education provision.

UKAT's institutional membership has continued to grow and 33 UK and Irish higher education institutions are now corporate members of UKAT, compared to 23 in 2020/21. All staff members of these institution can access the resources, publications and events that UKAT provides. Our member base, and its eight constituent Special Interest Groups provides a vibrant volunteer community focused on achieving UKAT's mission of enhancing student success through improving personal tutoring/academic advising

The 2022 UKAT Annual Conference occurred on 4-6 April 2022 and was UKAT's most successful annual conference to date, not only in terms of delegate numbers and the breadth of institutions represented, but more importantly in terms of the volume of high-quality submissions to the conference from the personal tutoring community. This reflects a continued interest in the importance of personal tutoring/academic advising in the HE sector as institutions realise how it can help them to achieve numerous aspects of higher education policy and address the requirements of the Office for Students, including access and participation, addressing differential attainment, personalisation of learning and teaching excellence. We must never forget that our students are the reason for everything that personal tutors/academic advisors do, and that our practice needs to meet their needs, so it was gratifying to see a greater student involvement in this year's conference, including a well-attended student discussion panel. Growing the direct student representation within the organisation is a key objective for UKAT and something which the Board continues to focus on in As in the previous two years, the conference was held online again in recognition of the financial pressures impacting the HE sector as a result of the pandemic. We are hopeful that these challenges are lessening and we hope to return the conference to an in-person conference in 2023.

During this year, the UKAT Board has spent significant time reviewing and revising the association's strategic goals to set its objectives and direction of travel for the next few years. The input of the UKAT Advisory Board, comprised of student and staff representatives of member institutions, has been instrumental in informing the revision of these goals.

We are delighted to have supported the creation of two publications relevant to personal tutoring and personal tutors over the last year. Since Spring 2020, we have worked in collaboration with the editors, the higher education community and the publishers to bring the Higher Education *Personal Tutor's and Advisor's Companion* textbook to fruition. This book is an edited collection which presents a broad range of contributions from across the sector discussing contemporary approaches to, and experiences of, all aspects of the personal tutoring process. This book promises to be an important resource for the UK higher education community for years to come. More indirectly, we have supported the author in developing a student-centred book entitled *You've Got This – A student's guide to wellbeing at University and Beyond*. Although targeted at students, it is a useful resource which personal tutors can use when working with their students. Following the launch of the UKAT guest-edited special edition of the *Frontiers in Education* journal in early 2021,

the UKAT Research Committee has also worked with NACADA to develop a special edition of the NACADA Review online journal focused on the experiences and development of personal tutoring through the Covid pandemic. Unfortunately this is unlikely to come to fruition as there were too few contributions received to enable the creation of journal edition. The UKAT Research Committee continues to seek other ways to disseminate personal tutoring research and has this year launched Wednesday Writers, a monthly online seminar and writing retreat activity designed to provide peer support to academic researchers of all level of experience focused on researching personal tutoring and academic advising.

Our successful Tutoring Matters free monthly webinar series continues to go from strength to strength. We are required to restrict the number of people who can participate in these webinars to comply with the conditions of our software licences, and all the places available are usually taken with days of registration opening. This last year has seen webinars on the topics of cross-cultural communication,

Our highly successful UKAT Professional Recognition scheme continues to grow and receive support from the UK HE community. This scheme, which designed to develop tutors/advisors as reflective practitioners who focus on their own ongoing professional development, has seen applications from staff of over 29 universities. Almost 400 people have registered an application and to date over 100 people have successfully achieved recognition through the scheme, whilst the remainder are applications which are still in progress. Several universities are encouraging large-scale engagement with the scheme and are beginning to link participation in the scheme with academic staff promotion criteria, helping to meet one of the scheme's objectives of raising the profile and importance of personal tutoring as an integral aspect of higher education learning.

The UKAT Professional Development Committee has developed the UKAT Professional Development Curriculum, a scaffolded collection of online learning opportunities and in-person workshops focused on an ever-expanding range of topics related to personal tutoring practice. The scheme offers learning opportunities at four levels – Fundamentals (the basics which we believe all personal tutors/academic advisors need to know), Introductory, Intermediate and Advanced. The online learning courses in the Fundamentals level were released in January 2022 and are freely available to all members. Member institutions will also be able to offer four online learning opportunities of their choice from the UKAT Professional Development Curriculum to all of their staff each year, to complement and enhance their in-house training. All of the learning opportunities in the Curriculum are collaboratively developed by expert volunteers drawn from across the whole spectrum of UK higher education.

The Curriculum has had a soft launch and engagement with it has been slow but is growing. The most successful activity delivered within the Curriculum to date has been an in-person workshop entitled *Managing Students in Distress* delivered at Birmingham University in April 2022. This highly-engaging workshop used innovative, immersive interactive theatre to explore how personal tutors can manage situations in which students come to them displaying varying levels of distress. The audience were able to pause the action to direct the actors in how to engage with the students and apply the scenarios so that they could see at first-hand how these approaches can help both tutor and student deal

more comfortably with distress. Participants told us that it was "*A really informative, relevant and authentic day which surpassed all expectations in the best possible way*", that "*This workshop should be mandatory training for all personal tutors*" and that they wished they "*had attended this workshop when I first became a personal tutor. It is the most relevant and well-delivered training I have experienced since beginning work in HE more than 10 years ago*". Given the positive response, this is a workshop that we intend to repeat on a regular basis, hopefully twice-annually.

UKAT continues to advise specific UK universities on enhancing their student advising processes, largely through consultancy projects and bespoke training workshops for staff. During the last year UKAT has provided this support to five UK universities.

In 2020/21 and 2021/22 UKAT's turnover came close to the mandatory VAT registration threshold of £85,000 of taxable turnover. Based on their reading of the relevant VAT Notices, the Trustees considered that much of UKAT's income may be VAT-exempt and engaged specialist VAT consultants to offer their guidance. The VAT consultants offered some suggestions for amending and strengthening organisations Constitution which were adopted by Members at the 2021 Annual General Meeting. The VAT consultants also recommended that the Board of Trustees submit detailed enquiries to HMRC to obtain clarification on the VAT status of UKAT's various supplies. Although HMRC have indicated on two occasions that many of UKAT's supplies are probably considered educational and therefore VAT exempt, the VAT consultants appointed by the Board were not satisfied that HMRC's response was sufficiently definitive for the Board to rely on. The Board has therefore written to HMRC once again to obtain a more definite clarification, and to seek specific clarification on the VAT status of membership which has been ignored in HMRC responses to date. This enquiry with HMRC remains open and the Board will continue to pursue it until a satisfactory clarification is obtained.

Section E

Financial review

Brief statement of the charity's policy on reserves

UKAT does not currently have a reserves policy. The development of a reserves policy remains an ongoing item of work for the Finance Committee, on behalf of the Board of Trustees.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

As noted above the Trustees continue to seek clarification on the VAT status of UKAT's supplies. The Trustees have not yet deemed it necessary to register for VAT as UKAT's turnover has remained just below the mandatory registration threshold. Given that much of its supply is likely to be considered VAT exempt and thus does not contribute to taxable turnover, it is likely to be some time before UKAT meets the mandatory VAT registration threshold but the Trustees will keep this under review, and consider this again once satisfactory clarification is received from HMRC.

UKAT has been engaged by an Irish university to provide services on two occasions during the period of reporting of this report. A portion of the fee paid to UKAT has been retained by the Irish Revenue as Professional Services Withholding Tax and can be reclaimed by UKAT on production of a certificate of tax residency in the UK. UKAT has attempted to obtain such a certificate from HMRC but it appears that, despite submission of all the necessary paperwork, HMRC did not complete UKAT's tax registration which was submitted in February 2020. UKAT has since applied again to register with HMRC for tax purposes again and that application is still in process. Once registration is complete, we shall apply for the certificate of tax residency and reclaim the tax due to us from the Irish Revenue.



Section F

Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	David John Lochtie	Neil Gordon Bangs
Position (eg Secretary, Chair, etc)	Chair	Trustee
Date	5 July 2022	



Receipts and payments accounts

For the period from	5/1/2021	To	4/30/2022
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £
A1 Receipts				
Membership	40,505	-	-	40,505
Conference	16,594	-	-	16,594
Consultancy	10,257	-	-	10,257
Sponsorship	2,000	-	-	2,000
Education and Training	9,405	-	-	9,405
Merchandise and Sales	1,178	-	-	1,178
Professional Recognition	-	-	-	-
Sub total (Gross income for AR)	79,939	-	-	79,939
A2 Asset and investment sales, (see table).				
	-	-	-	-
	-	-	-	-
Sub total	-	-	-	-
Total receipts	79,939	-	-	79,939
A3 Payments				
Salaries	41,759	-	-	41,759
Pensions	10,120	-	-	10,120
Conference	720	-	-	720
Consulting	1,590	-	-	1,590
Travel	435	-	-	435
Insurance	208	-	-	208
Cost of Merchandise	420	-	-	420
IT & Software	9,640	-	-	9,640
Subscriptions	180	-	-	180
Volunteer/Employee Expenses	-	-	-	-
General Expenses	663	-	-	663
Bank Fees	17	-	-	17
Payment Processing Fees	550	-	-	550
Sub total	66,302	-	-	66,302
A4 Asset and investment purchases, (see table)				
	-	-	-	-
	-	-	-	-
Sub total	-	-	-	-
Total payments	66,302	-	-	66,302
Net of receipts/(payments)	13,637	-	-	13,637
A5 Transfers between funds	-	-	-	-
A6 Cash funds last year end	59,848	-	-	59,848
Cash funds this year end	73,485	-	-	73,485

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £
B1 Cash funds	Current Account	72,883	-
	PayPal Account	602	-
	Stripe Account	-	-
	Total cash funds	73,485	-
	(agree balances with receipts and payments account(s))	OK	OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £
B2 Other monetary assets		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

Categories	Details	Fund to which asset belongs	Cost (optional)
B3 Investment assets			-
			-
			-
			-
			-

Categories	Details	Fund to which asset belongs	Cost (optional)
B4 Assets retained for the charity's own use			-
			-
			-
			-
			-
			-
			-
			-
			-

Categories	Details	Fund to which liability relates	Amount due (optional)
B5 Liabilities			-
			-
			-
			-
			-

Signed by one or two trustees on behalf of all the trustees

Signature



Print Name

DJ Lochtie

Ang

NG Bangs

CC16a

Last year

to the nearest £

23,671
40,438
10,080
4,000
-
349
5,348
83,886

-
-

83,886

34,807
3,959
821
-
-
208
1,494
2,850
63
83
101
401
44,786

-

44,786

39,099
-
20,748
59,848



Endowment funds

to nearest £

-
-
-
-

OK

Endowment funds

to nearest £

-
-
-
-
-
-

Current value (optional)

-
-
-
-
-

Current value (optional)

-
-
-
-
-
-
-
-
-

When due (optional)

Date of approval

7/5/2022

7/5/2022



Section A Independent Examiner's Report

**Report to the trustees/
members of** UK Advising and Tutoring (UKAT)

**On accounts for the year
ended** 30th April 2022 **Charity no
(if any)** 1185020

Set out on pages

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30 / 04 / 2022

**Responsibilities and
basis of report** As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

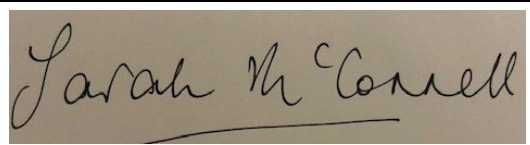
I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent
examiner's statement**

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

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

Signed: 

Date: 6th July 2022

Name: Sarah McConnell

	Relevant professional qualification(s) or body (if any):	Member of Institute of Chartered Accountants in England and Wales (ICAEW)
	Address:	56, Lewes Road
		Haywards Heath
		RH17 7SN

Section B Disclosure

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

N/A

UK ADVISING AND TUTORING

England & Wales - Charity number 1185020

Accounts



Trustees' Annual Report for the period							
		Period start date			Period end date		
From	1	5	2020	To	30	4	2021

Section A Reference and administration details

Charity name UK Advising and Tutoring

Other names charity is known by UKAT

Registered charity number (if any) 1185020

Charity's principal address

York St John University
Lord Mayor's Walk
YORK
Postcode YO31 7EX

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	David John Lochtie	Chair		Members
2	Benjamin Wilfrid Walker			Members
3	Emily Alice McIntosh			Members
4	Susan Anne Smith			Members
5	Dionne Elizabeth Barton			Members
6	Ann Lesley Bingham			Members
7	Oscar van den Wijngaard			Members
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

David Grey

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation
Trustee selection methods (eg. appointed by, elected by)	Elected by Charity Members

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

UKAT is allied to *NACADA, the Global Community for Academic Advising*, a US-based non-profit organisation which supports the global higher education community, and which has similar objectives to those of UKAT.

UKAT is a registered member of the National Council for Voluntary Organisations (NCVO). Trustees are provided with access to, and asked to engage with, NCVO's Trustee training and charity governance guidance and resources.

UKAT has followed NCVO guidance, and adopted and adopted NCVO sample policies and procedures in defining its organisational structure and procedures

Summary of the objects of the charity set out in its governing document

The objects of the charity are to advance the education of Higher Education students through the provision of effective personal tutoring and academic advising.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

UKAT seeks to achieve its objectives through advancing the field of academic advising and personal tutoring, and working with key stakeholders including members, higher education institutions and their staff, and students, to enhance academic advising and personal tutoring practice. UKAT supports the sharing and dissemination of good practice, through conferences, webinars, professional development activities, professional recognition, research, resources, articles, and networking.

UKAT endeavours to promote a scholarly-informed approach to personal tutoring and academic advising, and the adoption of high-impact, evidence-informed practices by individual educators and their institutions to enhance student outcomes.

UKAT provides a range of consultancy, professional development and training for personal tutors and academic advisors through webinars, online courses, networking opportunities and practice sharing events. The two primary professional development activities offered by UKAT are a freely available monthly webinar series open to anyone, and the UKAT Annual conference.

UKAT offers advice and guidance to higher education institutions seeking to improve the provision of personal tutoring and academic advising processes for their students. It does this through:

- Publications and guidance documents, including a professional standards framework
- Freely available educational resources for higher education providers and individual personal tutors/academic advisors to use in supporting their students
- Consulting directly with individual higher education institutions

UKAT also supports, promotes and facilitates the dissemination of research into personal tutoring and academic advising, to enhance the publicly-available evidence base of effective practices and to encourage all practitioners to adopt a scholarly-informed approach.

The Trustees have considered the Charity Commission guidance on public benefit to satisfy themselves that UKAT's activities meet the public benefit requirements. The Board of Trustees takes account of the public benefit guidance in considering proposals for the introduction of new activities, and changes to existing ones.

Additional details of objectives and activities (Optional information)

UKAT employs one member of staff (the CEO). Apart from the contribution of the CEO, all the activities of UKAT are undertaken by experienced volunteers who are employed within UK or global higher education settings.

UKAT does not currently award grants.

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

The period covered by this report has been a successful one in which there has been a growth in demand for the support that UKAT provides. The COVID pandemic, and the move to remote online teaching, has resulted in higher education institutions relying on their personal tutoring/academic advising provision to help students develop a sense of cohort cohesion and belonging to an institution and academic community which they may not have physically visited. The educational experience of many higher education students, especially first year students, has been very different this last 12 months, and the nature of the issues and challenges faced by students has also been different. In most cases, personal tutoring/academic advising has also needed to be conducted remotely and online and many tutors have felt unprepared to support students in this way.

UKAT has responded to the challenges of the pandemic by increasing the number of resources and guidance publications it provides, covering an increased range of topics of particular relevance to practitioners at this time. A particular focus was given to choosing webinar topics that were particularly pertinent to equipping tutors/advisors to support their students remotely through the pandemic and the number of webinars offered was increased. Attendance at webinars remains strong, with every webinar this year reaching its 100-person registration limit.

The 2020 UKAT Annual Conference was scheduled to occur on 6/7 April 2020 but was postponed until September 2020 and rearranged to occur as an online conference running over four days instead of two. Additional content was added to offer a focus on supporting students remotely and using technology effectively. 120 delegates registered to attend the conference. The 2021 Annual Conference took place in March 2021 and was also an online conference. Even though this occurred only 6 months after the previous conference, it was UKAT's most successful conference to date, with over 170 delegates attending, reflecting a renewed interest in the importance of personal tutoring/academic advising in the HE sector. Many delegates sent messages of thanks to the organising team, noting that it was one of the most useful, friendly and engaging conference they have attended, either physically or online. UKAT offered a two-for-one offer on delegate registrations for the 2021 conference in recognition of the financial constraints affecting HE institutions as the result of the pandemic. This was also useful in increasing delegate numbers and increasing the number of HE institutions engaging with us. Online conferences have lower overheads than physical events and holding two online conferences within the period of this report has strengthened UKAT's financial position, enabling us to survive the pandemic without having to furlough staff or seek any form of financial aid. For the 2021 conference we also offered free student delegate registrations for student representatives from member institutions, and we were delighted that 10% of our delegates this year were students registered on higher education courses. Growing the direct student representations within the organisation is a key objective for UKAT and this was one initiative to help meet that goal. UKAT also hosted a student intern from Sheffield Hallam University to work on publicity and conference organisation. It was a successful placement; the intern worked with UKAT one day a week for five months and helped make the conference a great success. He also hosted a student focus group at the conference to help us better understand the needs of contemporary students so that we can support personal tutors/academic advisors to support their students more effectively.

The effects of the pandemic have been felt in every nation and affected students and advisors/tutors around the world. Over the last 12 months UKAT has deliberately worked with other associations around the world to bring together members to share practice and experiences to help them support students more effectively. In December 2020 we joined forces with LVSA, the Dutch study advisors' association, to hold a symposium focused on helping advisors/tutors recapture their passion for supporting students. In March 2021, we connected the LVSA and UKAT conferences online, sharing some sessions and hosting a second joint symposium reflecting on the lessons learned from supporting students through the pandemic and identifying effective practices that should be continued into the future. The partnership with LVSA continues to grow, with further joint activities planned for the autumn of 2021. Within the UK we collaborated with AMOSSHE and Action on Access to offer webinars and resources focused on effectively supporting vulnerable and disadvantaged students. Further joint activities are planned with both organisations.

UKAT membership continues to increase with 23 UK universities (~1/6 of mainstream UK universities) taking out institutional membership. An Advisory Board of membership institutions was created to offer advice and guidance on UKAT's strategy, the ways in which it serves its institutional and individual members, and the value that it brings to them. The Advisory Board recommended that UKAT seek student representation amongst the organisation, as a result of which all member institutions were invited to bring a student representative to the annual conference free of charge. From January to May 2021, UKAT hosted a student intern from Sheffield Hallam University through a one-day per week placement. This intern supported the organisation and delivery of the conference, including hosting a student focus group and presenting a student voice webinar, as part of the drive to increase student voice and representation in the association.

Interest in the UKAT Professional Recognition scheme, a scheme designed to develop tutors/advisors as reflective practitioners who focus on their own ongoing professional development, continues to grow. Staff from 16 universities (post-92 and Russell group) have participated in the scheme over the last year, with 153 individuals registering to participate in the scheme and 60 achieving recognition for their experience in personal tutoring/academic advising. The UKAT Professional Development Committee has also spent the last year planning a 'curriculum' of online professional development offerings for advisors/tutors which is designed to complement the professional recognition scheme and scaffold their professional development throughout their career. The first phase of this online professional development curriculum is focused on supporting new academics to be effective advisors/tutors and is due to be made available before the end of 2021. The development of this curriculum is a collaborative effort between UKAT members, and representatives of UK higher education institutions, Action on Access, NACADA and the National Science Foundation ASPIRE Alliance for inclusive learning and teaching in the US.

UKAT has continued to advance the scholarship of personal tutoring/academic advising through the work of its Research Committee. Since 2019 this Committee has, in conjunction with US and Dutch collaborators, been editing a Special Edition of the *Frontiers in Education* online journal focusing on "Academic Advising and Tutoring for Student

Success in Higher Education: International Perspectives". The Special Edition was completed and formally published in February 2021. The completed collection includes 14 manuscripts from international authors and, to date, the collection has been viewed by over 32000 readers from across the world.

UKAT continues to advise specific UK universities on enhancing their student advising processes, largely through bespoke training workshops for staff. During the last year UKAT has provided this support to five UK universities.

The governance of the organisation has been strengthened over the past year with the introduction of two new sub-committees of the Board of Trustees. A Finance Committee has been created, chaired by a suitably qualified Trustee, to maintain oversight of UKAT's finances, and to review and document appropriate financial controls, the procedures used for authorising payments, reconciling bank accounts and ensuring that all membership dues are received.

A Membership Committee has also been created to regularly review and update the categories of membership, the rights and benefits which these concur, and the procedures relating to membership and the collection of membership dues.

Section E

Financial review

Brief statement of the charity's policy on reserves

UKAT does not currently have a reserves policy. The Board of Trustees will discuss and approve a reserves policy for introduction in the 2021 financial year.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

UKAT's turnover for the 12-month period to end of April 2021 is £83637, very close to the mandatory VAT registration mandatory of £85,000 of taxable turnover. Based on their reading of the relevant VAT Notices, the Trustees are not clear that all of UKAT's income would be considered for VAT, and thus contribute to taxable turnover. Many of UKAT's activities constitute education and training which are considered VAT exempt, and it is not clear whether other sources of income, such as the payment of membership fees, would be liable for VAT. The Trustees, through the UKAT Treasurer, have consulted HMRC's VAT specialists for clarification regarding the VAT liability of each of UKAT's activities to determine whether VAT registration is mandatory for the organisation at this time and the activities on which VAT would need to be charged if this proves to be the case. This enquiry was lodged with HMRC on 21 April 2021. Despite several attempts to follow up this enquiry, no response has yet been received from HMRC.

At the time of writing, UKAT's total turnover is close to, but has not exceeded, the VAT registrations threshold of £85,000. The Treasurer and Finance Committee will continue to seek clarification from HMRC and monitor UKAT's turnover with reference to the mandatory VAT registration threshold. The organisation will register for VAT in accordance with HMRC requirements as soon as the Trustees are satisfied that the registration requirements have been met.

The Trustees will also consider whether it would be prudent for UKAT to voluntarily register for VAT and, if so, when this should be done. The Trustees should also consider the various VAT payment schemes available to decide which one would be most appropriate for UKAT to adopt whenever it does register for VAT.

Section F



Other optional information

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Section G**Declaration**

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	David John Lochtie	Ann Lesley Bingham
Position (eg Secretary, Chair, etc)	Chair	Trustee
Date	21 September 2021	



Receipts and payments accounts

CC16a

For the period from	01/05/2020	To	30/04/2021
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Membership	23,671	-	-	23,671	7,960
Conference	40,438	-	-	40,438	5,777
Consultancy	10,080	-	-	10,080	10,080
Sponsorship	4,000	-	-	4,000	1,000
Training	-	-	-	-	-
Sales	349	-	-	349	49
Professional Recognition	5,348	-	-	5,348	73
Sub total (Gross income for AR)	83,886	-	-	83,886	24,940
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	83,886	-	-	83,886	24,940
A3 Payments					
Salary	34,807	-	-	34,807	12,267
Pensions	3,959	-	-	3,959	3,346
Conference	821	-	-	821	502
Travel	-	-	-	-	-
Insurance	208	-	-	208	-
Publications	1,494	-	-	1,494	1,494
IT & Software	2,850	-	-	2,850	841
Subscription	63	-	-	63	-
Volunteer/Employee Expenses	-	-	-	-	-
General Expenses	83	-	-	83	32
Currency Conversion Fees	101	-	-	101	79
Payment Processing Fees	401	-	-	401	90
Sub total	44,786	-	-	44,786	18,651
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	44,786	-	-	44,786	18,651
Net of receipts/(payments)	39,099	-	-	39,099	6,289
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	20,748	-	-	20,748	20,748
Cash funds this year end	59,848	-	-	59,848	27,037

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Current Account	59,534	-	-
	PayPal Account	314	-	-
	Stripe Account	-	-	-
	Total cash funds	59,848	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK


Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature 	Print Name DJ Lochtie	Date of approval 13/06/2021



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

UK Advising and Tutoring (UKAT)

**On accounts for the year
ended**

30 April 2021

**Charity no
(if any)**

1185020

Set out on pages

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30/04/2021

**Responsibilities and
basis of report**

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent
examiner's statement**

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

Signed:



Date:

20 June 2021

Name:

Douglas Meikle

**Relevant professional
qualification(s) or body
(if any):**

Member of Chartered Institute of Management Accountants

Address:

37 Rowntree Wharf,
Navigation Road,
York YO19XA

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

n/a