



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

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	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)

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 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 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)

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.

Section D

Achievements and performance

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.

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.

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

CC16a

For the period
from

5/1/2022

To


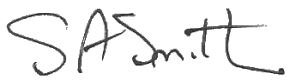
4/30/2023

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	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	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds 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
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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.