

UBS Optimus Foundation

UK Education **Giving Circle⁺**



UBS

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Education is an investment in the future. It enables young people to reach their potential, drives economic growth, translates into better health outcomes and fosters social cohesion.

The UK's education system is not fair, however. The gap in achievement and opportunity between the disadvantaged children and their peers is growing. There are stark regional disparities, differences by ethnicity, and ongoing inequalities from the disruption caused by the pandemic.

This situation can be changed. We have increasing evidence on what works (and what doesn't), and there are places and organizations bucking the trend. The key challenge is how we take the ideas, innovations and practices that work to scale.

Our UK Education Giving Circle⁺ brings together philanthropists who want to work collaboratively to tackle educational inequality in the UK.

Giving Circle⁺ members will share insights, support thought leadership, and co-fund initiatives so that they can:

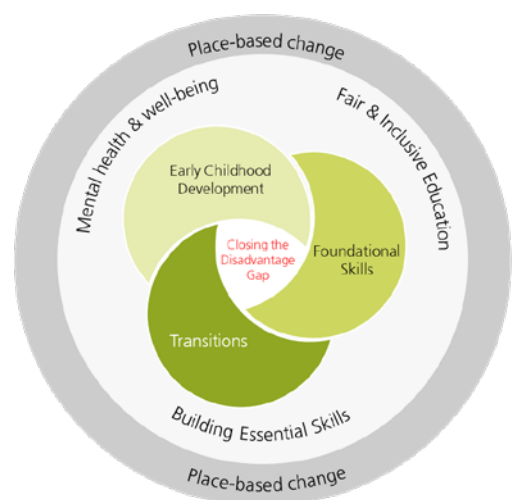
- Maximize the funding reaching organizations who are best placed to drive change
- Develop deeper expertise as funders and philanthropists

Funding Program

Leveraging the expertise of the UBS Optimus Foundation, the Giving Circle⁺ will co-fund programs and initiatives associated with the UBS Optimus Foundation UK Education Collective Portfolio.

This might involve funding a particular **area of focus**, such as Early Childhood Development, funding activities in a particular **geographic area** or region, supporting an organization to **scale** their work, or funding **research or evaluation**.

Funding will be **pooled and allocated** by our UBS Optimus Foundation expert Program Directors to deliver impact. Wherever possible, funding will be provided on an outcomes-based, unrestricted basis to trusted partners at an organizational level. Reports on the activities funded by the Giving Circle⁺ and their impact will be provided every six months.



Learning and Insight Program – the **plus!**

Giving Circle⁺ members will also have exclusive access to an **ongoing program** of learning and insights. A range of different events and activities will provide the chance to meet with leading organizations and expert practitioners. Organised visits will also provide the opportunity to meet with the partner organizations, communities and young people supported by the **Giving Circle⁺** members, alongside their peer philanthropists.

Insight activities will be integrated with **philanthropy workshops** to help members further develop their core philanthropic competencies (such as how to identify opportunities, conduct organizational due diligence, or evaluate impact) and learn how community-based, market-based and policy-based interventions can drive scale and systemic change.

Giving Circle⁺ members are free to participate in as much of the learning and insight program as they wish. Members might be at different stages in their philanthropic journey, or have particular interests. Participation is **flexible** and activities will be structured to take place in a range of formats to fit alongside work, family and other commitments.

Commitment

- Members are asked to donate a minimum of GBP 50,000 each year, for at least two years
- Each donation will be increased by a **25%** matching contribution* from UBS
- Each member can bring along a family member or friend to **Giving Circle⁺** Learning and Insight Program events and activities

One final requirement....

There is one other commitment **Giving Circle⁺** members are asked to make: to **collaborate**.

We know that there are no silver bullets and that building a fairer education system in the UK will take long-term, collaborative action from multiple stakeholders. Members are encouraged to share their ideas, know-how, experience, connections and learning with other members of the **Giving Circle⁺** and beyond, to help build a philanthropic movement working to transform opportunities for disadvantaged young people across the UK. Because this is an investment of time, resource and energy worth making.

* Subject to match funding availability. Enhanced match of 25% applies to the **Giving Circle⁺** donations only, donations to UBS Optimus Foundation partners outside the **Giving Circle⁺** membership will continue to be matched at 10%.

Is our UK Education **Giving Circle⁺** right for you?

- You want to help tackle educational inequality in the UK
- You care about impact and want to scale interventions that work
- You want to pool your funding to collaborate with your peers
- You want to learn from and with others how to be effective with your philanthropy
- You're happy to delegate due diligence to UBS Optimus Foundation, so you can focus your time on impact

We are happy to welcome new members to the **Giving Circle⁺** at any time! Speak to your UBS Client Advisor or contact a member of our UBS Philanthropy Services team to find out more.



Contact us: sh-ukphilanthropyservices@ubs.com

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