



CHARITY COMMISSION
FOR ENGLAND AND WALES

THE KALISHER TRUST

1062363

Receipts and payments accounts

CC16a

For the period
from

Period start date
06/04/2021

To

Period end date
05/04/2022

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					
Donations and fundraising	138,901	-	-	138,901	24,226
Interest on deposit account	12	-	-	12	33
Book Royalties	53	-	-	53	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	138,966	-	-	138,966	24,259
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	138,966	-	-	138,966	24,259
A3 Payments					
Cost of Fundraising events	8,578	-	-	8,578	1,162
Grants and donations paid	40,198	-	-	40,198	21,000
Bank charges	47	-	-	47	120
Website	2,464	-	-	2,464	3,623
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	51,287	-	-	51,287	25,905
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	51,287	-	-	51,287	25,905
Net of receipts/(payments)	87,679	-	-	87,679	- 1,646
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	82,450	-	-	82,450	84,096
Cash funds this year end	170,129	-	-	170,129	82,450

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 and deposit accounts	170,129	-	-
		-	-	-
		-	-	-
	Total cash funds	170,129	-	-
	(agree balances with receipts and payments account(s))	OK	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	
	Henrietta Paget (signed original on file)	H. PAGET	15.1.23	



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
The Kalisher Scholarship

On accounts for the year
ended

5 April 2022

Charity no
(if any)

1062363

Set out on pages

1 of 2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 05/04/2022.

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 (other than that disclosed below *) 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:

01/12/2022

Name:

Elize Stoneham

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

Chartered Accountant

Address:

Wilmington House

High Street, East Grinstead
West Sussex, RH19 3AU

Section B**Disclosure**

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.

THE KALISHER TRUST

REPORTS AND FINANCIAL STATEMENTS

For the year ending January 2022

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The Trustees are pleased to present their report of the work of the charity for the twelve months from:

February 2021 to February 2022

Reference and administrative details

Charity Name	The Kalisher Trust
Registered Charity Number	1062363
Registered Address:	18 Red Lion Court. London. EC4A 3EB
Principal contact	www.thekalishertrust.org.uk Email: administrator@thekalishertrust.co.uk

Charity's main agents and advisors:

Accountants	Place Campbell, Chartered Accountants, Wilmington House, High Street, East Grinstead, West Sussex, RH19 3AU DX 300219 East Grinstead
Solicitors	Titmus Sainer Dechert, Sergeant's Inn, Temple London EC4Y 1LT
Bankers	HSBC Bank 165 Fleet Street London EC4A 2DY

The Kalisher Trustee Board

The Directors of the Charitable Company ('the charity') are its Trustees for the purpose of charitable law, and throughout this report are collectively referred to as the Trustees. The Trustees serving during the relevant year were as follows:

President	Lord Judge PC
Vice President	Martin Shaw
Vice President	Lord Ajay Kakkar
Chairman of Trustees	Sir Ralph Waller
Vice Chair	Mark Fenhalls KC
Vice Chair	Dr Camilla Darling
Treasurer	Henrietta Paget

Trustees

Andrew Fisher KC
 Andrew Hall KC
 Max Hardy
 Henrietta Paget
 The Rt Hon Lady Justice Rafferty DBE PC
 Ed Gross
 Merry Van Woodward
 Gary Green
 Danielle Manson
 Rabah Kherbane

Patrons

Anthony Arlidge KC
 HH Brian Barker CBE KC
 The Hon. Mrs. Justice Carr DBE
 The Hon. Mrs. Justice Cheema-Grubb DBE
 Ray Fearon
 Kim Hollis KC
 HHJ Stephen Kramer KC
 HHJ Richard Marks KC
 Nicholas Purnell KC
 Joshua Rozenburg KC (Hon)

Secretaries	James Gwatkin
Director of Education	Sue Freestone

Vice Chair's Report

Covid-19

The impact of Covid-19 continued to impact Trust activities for most of 2021. However, there was some evidence of a return to 'normality' as advocacy training was completed in person during September and October 21. The Trust worked on a hybrid offer during late 2021.

Aims and Organisation

The Kalisher Trust is principally designed to offer aspiring barristers funding and other support and guidance as they seek and/or embark on pupillage; and, secondarily, for practitioners during the early stages of tenancy. This is very often an extremely financially and practically demanding period for those seeking to establish practice at the Bar. The Trust aims to make awards and provide guidance to those graduates of exceptional promise but modest social and economic background, who might not otherwise be able to pursue a career path to the Bar.

The Trust is primarily organised and run by practising members of the Judiciary and Bar on a voluntary basis, as well as members of the higher education sector and performing arts professions, together with the assistance of its volunteers. The Trust expresses its thanks for the services and time donated by these individuals. There are no employees but, since February 2016, the Trust has from time to time used part-time administrative support when necessary.

Review of Effectiveness and Achievements

A review of effectiveness conducted over the last few years has seen a change in the channeling of the Trust's funding from the original major Scholarship model to the award of several funded placements with partner organisations in the legal sphere, and the provision of training and other guidance opportunities for aspiring barristers. The object of this change was to spread the charity's benefit more widely each year. In addition, the Trust now takes on educational activities – usually in secondary schools – which educates young people in a life in the Law, and gives them training in advocacy skills useful in any walk of life.

Events & Activities

At the beginning of 2021, it was not possible to do any in person events, however we hosted many successful virtual events during 2021, including:

- A virtual training session on pupillage applications on 28th January 2021 (chaired by Rabah Kherbane with Max Hardy, Danielle Manson, and Joanna Hardy) which had 126 attendees.
- A virtual training session on pupillage interviews on 23rd February (led by Garry Green, with Rhiannon Crimmins and Katrina Walcott).

- A virtual debating competition with Queen Mary, University of London Law Society on 6th February 2021 (led by Max Hardy, with Garry Green, Margaret Obi, and Nutan Fatania)
- A virtual training session on pupillage interviews on 23rd February (led by Garry Green, with Rhiannon Crimmins and Katrina Walcott).
- A virtual Life in the Law session with the Milton Keynes Academy (part of the Creative Education Trust), on the 2nd March, for Year 12 and 13 students, attended by Sue Freestone, Camilla Darling, Michael Polak, and Martin McCarthy.
- A virtual 'Conversation With' to mark International Women's Day on the 8th March (chaired by Danielle Manson, featuring Anne Rafferty, Alison Levitt KC and Judy Khan KC)
- Three sessions on trial preparation; exam in chief; and cross examination (led by Andy Hall KC) on the 8th, 15th, and 22nd March.
- A virtual welcome to the Senior Counsel group on the 16th March 2021.
- A virtual 'Life in the Law' session with Harris Federation on the 26th March attended by Mark Fenhalls, Sue Freestone and Merry Van Woodenberg.
- A two-hour session for the University of Sheffield's Discovery Programme for year 12 students, on the 6th April, attended by Camilla Darling, HHJ Rachael Harrison, Richard Thyne, Joe O'Brien, Sara Robinson, and Richard Keenan.
- A virtual celebration of our 2021 Essay Prize winner, Andrew Pickin, KBW Chambers, Leeds. He was awarded his prize by Rob Rinder (formerly of 2 Hare Court), on the 27th April.
- A virtual Life in the Law session with Lynn Grove Academy (part of the Creative Education Trust), for Year 10 students, on the 17th May, attended by Sue Freestone, Camilla Darling, Nate Toms and Ailsa McKeon.

In the latter half of 2021 and in early 2022, we held the following events in person:

- Advocacy training for 10 students held in the Royal Courts of Justice, Doughty Street Chambers and the Central Criminal Court. We are very grateful to trainers Richard Quine, Karen McLachlan, Rabah Kherbane, Abi Bright, Sapna Devi and Mark Fenhalls KC.
- A session for Year 13 students participating in the University of Sheffield's Discover Law programme, on the 7th October, with Dan Taylor and Nate Toms talking about their journey to the criminal Bar.
- The Kalisher Lecture, was held on the 17th January 2022 at the Old Bailey in partnership with the Criminal Bar Association. Sir Stephen Silber delivered the Lecture, on Judge Jeffreys.

NB: All online sessions were recorded; recordings are added to our growing cache of sessions on our site; and all were publicised on twitter.

Essay Prize 2021

The 2021 Kalisher Essay Competition, which carried a prize of £2,000, was open to all pupils undertaking a criminal pupillage. The competition was launched via Twitter in January 2021 as well as in a letter to all criminal sets, inviting submissions of up to 2,000 words in answer to the following question:

“Covid19 lockdown rules have been described by some as among the most onerous restrictions to personal liberty since Oliver Cromwell’s time. As a “government lawyer” advise your Minister as to the pros and cons of any submission that recent public health legislation is a disproportionate breach of human rights law.”

Entries were judged by Judy Khan KC and Peter Doyle KC with the assistance of James Gwatkin. One winner was selected at the end of March 2021, Andrew Pickin of KBW Chambers in Leeds.

Trust Composition

Garry Green, Danielle Manson and Rabah Kherbane were welcomed as new trustees in January 2021.

In line with the agreement that we gradually reduce the numbers of Trustees, we established the Senior Counsel group, enabling us to retain the expertise and networks of some trustees who will move to this group. Peter Doyle KC and Sir Brian Leveson resigned as Trustees, and as of January 2021, and moved to this group.

The Early Career Group (which will include those who are more than occasional volunteers but cannot take on trustee status) will be launched in early February 2021.

Other key goals for 2021-22 were to establish ‘lead’ trustees who can work on areas such as education, advocacy training, virtual events, and fundraising.

Ben Yallop (the Lord Chief Justice’s Private Secretary) agreed to act as a critical friend to the Trust. He provides connection and insight, ensuring that our close and constructive relationship with the Lord Chief Justice’s office continues.

Mark Fenhalls KC moves from Co-Vice Chair to trustee status from January 2022, coinciding with the start of his term as Chair of the Bar Council.

Ryan Evans stepped down as Secretary at the end of 2021 as he moved overseas and will commence a pupillage at 5 Paper Buildings in October 2022.

Internships, Scholarships

Andy Hall KC leads these two related programmes. We are maintaining existing commitments, as follows:

- £5000 QMUL scholarship (LLM) * on hold for 2020/2021 academic year.
- £6000 Wadham/Oxford scholarship (LLM)
- £4000 CCRC internship
- £5000 Justice internship
- £6000 Birmingham University scholarship (LLM) *on hold for 2020/21 year as no suitable candidates*

- £5000 Amicus internship
- £6000 Death Penalty Project (funded by Doughty Street Chambers)

Our partnership with the University of Birmingham has recently been renewed for 2021 onwards, thanks to the intervention of Andrew Fisher KC.

University Outreach

Our second event with the Access Project was held on 15th July 2021. This was a virtual debating workshop with the following topics:

(1) Once the vaccine has been rolled out in the UK, Coronavirus vaccine IDs should be required to access public transport, restaurants and certain workplaces.

(2) High profile criminal trials in England and Wales should be televised.

On the 23rd July 2021 we ran a virtual advocacy session as part of a two day event that Balliol College Oxford and the Sentencing Academy were running as part of their own outreach work. A big thank you to Elspeth Windsor who brought everyone together and continues to contribute greatly to Kalisher events.

Schools Outreach

We have revitalised our former partnership with Sheffield University which allowed us to host an event on 6th April 2021 on 'Life in the Law'. This was aimed at Year 12 and 13 students who are considering studying Law at university and was open to students nationally.

Our East Anglia outreach work with the Creative Education Trust culminated in our virtual contribution to a pilot advocacy challenge during the spring and summer of 2021. While the schools' participation in this was affected by Covid, overall, it was a success and was very well received by the CET itself.

CET are now planning a fuller, more in-person second advocacy challenge. The pilot challenge included a Kalisher representative at each of the three introductory sessions; Kalisher representatives giving virtual coaching to the small teams of students; and Kalisher representatives at the finals. The winning team was welcomed by local MP Peter Bone at the Houses of Commons recently.

We contributed to three sessions with the Harris Federation in the academic year 2020-21, and have further sessions planned for the year 2021-22.

Fundraising

In early 2021, Sir Ralph Waller (our Chair) kindly donated £5000 to the Trust, which contributed to our fund for our existing set of internships and scholarships. He donated

another £5000 in August 2021. 23 ES (a set of chambers) which sponsored the Autumn 2021 advocacy training, donated £5000; 2 Hare Court (a set of chambers) also donated £5000.

In September 2021, Sir Ralph confirmed a significant donation to the Trust from Mrs Mae Zhu, who wishes to support educational charitable endeavours, and has done so via the University of Oxford. The Development team at Oxford have carried out due diligence which is recorded via email. We are incredibly grateful to Sir Ralph and to Mrs Zhu. This donation of £100,000 means that we can have confidence in our internship programme for the next two years.

Review of Financial Activities and Affairs – Henrietta Paget, Treasurer

As has been the position since our inception, funds have been raised from a wide variety of sources including annual fundraising events, donations by individuals, sets of Barristers' Chambers, firms of Solicitors, and, often, joint funding of Kalisher Internships with the providers concerned.

Summary

1. During the financial year to April 2022, the Trust made good progress in re-establishing its work both in terms of fundraising and resumption of both core and associated activities. It also had the benefit of a very substantial private donation. Total income received within the financial year to April 2022 was c.£138,000. Total expenditure was c.£51,309. So with the final lifting of COVID-19 restrictions, the Trust was well placed quickly to resume its work and is in a position to continue to build on opportunities for significant expansion in terms of activities and awards.

Income

2. The Trust's income can be broken down as follows: -

- Donations £114,000
- Fundraising events £17,850
- Royalties £52.97

In addition,

(a) A donation of £6,000 was made by Doughty Street Chambers, ring-fenced for the Death Penalty Project;

(b) Payments of £1,000 were made by Chambers to sponsor the entries of pupils entering the Kalisher Prize Essay Competition.

3. The Trust is very grateful to all our many donors. We would particularly like to thank those who regularly give by standing order. Regular donations, even in modest amounts, make an enormous difference and this continuing support of the Trust's work is deeply appreciated. A great deal of gratitude is owed to our larger benefactors, whose generosity and support makes the funding of our larger projects possible.

Expenditure

4. Spending can be broken down as follows: -

- Internships and scholarships £33,000
- Website and administration £5,500

Advocacy training: £5,000
Fundraising costs: £4,000
Essay competition: £2,000
Educational Outreach: £1,500

Conclusion

5. Thanks to the work done by the Trustees over the last two years to review and consolidate the Trust's organization, core activities and goals, the Trust was well placed to weather the turmoil of the COVID-19 era. Since the end of the financial year to April 2021, the Trust has been able to rebuild its core activities and embark on a period of new growth, including the re-establishment of several of our former initiatives and, crucially, beginning the reworking of the Trust's Education and Outreach Programme.

Plans for Future Development

The Trustees remain engaged in an ongoing review of the Trust's core activities, monitoring the effectiveness of the Trust's work and ensuring that the benefit of Kalisher support and funding continues to be focused on those aspiring to practice at the criminal bar.

Due to the Trustees' desire to spread the benefit of the charity as widely as possible, an Awards Committee continues its work in generating Internships and other placements and selecting the recipients for such awards.

Thanks

The Kalisher Trust is grateful to Place Campbell, Chartered Accountants (particularly Elize Stoneham), for their continuing work *pro bono* for the Trust.

Further information is available on our website: www.thekalishertrust.org

A handwritten signature in grey ink, appearing to read 'C. Daly'.