

The logo features a stylized, three-dimensional representation of a menorah. The top bowl is white with a blue Star of David. The central stem and the lower branches are decorated with alternating blue and white stripes. The entire logo has a soft blue shadow beneath it.

UNION OF  
BRITISH  
MESSIANIC  
SYNAGOGUES

# **Annual Trustees Report for Financial Year 2019/20**

**31 August 2020**

## **Trustees Report for the year ended 31<sup>st</sup> August 2020**

The Trustees present their report along with the accounts of the charity for the year ended 31<sup>st</sup> August 2020. The accounts have been prepared in accordance with the UBMS accounting policies and comply with the applicable law and the requirements of the Charities Act 1993, as amended by the Charities Act 2011, and the trust deed. The Trustees have adopted a receipts and payments accounting method.

### **Reference and Administrative Information**

**Charity Name:** Union of British Messianic Synagogues ('UBMS')

**Charity Registration Number:** 1116974

**Principal Office:**

c/o Adat Yeshua Messianic Synagogue  
Essex Street  
Norwich  
Norfolk  
NR2 2BL

**Board of Trustees:**

Lenka Carbonell Marvan (Interim Chair)  
Rabbi Brian Sabey  
Jonathan Marlow  
Antonia Baiao

**Bank:**

HSBC, 21 Meridian Way, Meridian Business Park, Norwich, NR7 0TA

### **Constitution and Objects**

The Union of British Messianic Synagogues (UBMS) is constituted under a deed of trust established in 2006 and is a registered charity No. 1116974.

The principal objects of the UBMS are to provide leadership, training and accountability structures for its affiliated synagogues, to act as an employer to the Rabbis appointed to the leadership of these synagogues and to promote Messianic Judaism in the spheres of public worship, religious, educational, social, cultural and charitable activities.

## **Structure, governance and management**

The UBMS's governing document is its constitution set out in the Trust Deed, which is reviewed periodically. The Trustees of the charity normally meet officially three times a year and liaise frequently to review the operational and financial activities of the UBMS. Two of the trustees are also members of the Charity's Executive Team, which makes all significant operational decisions for the running of the Union. The Executive Team meets four times a year, its President is Rabbi Binyamin Sheldrake and is chaired by Rebbetzin Avigayil Sabey.

## **External affiliations**

The UBMS provides oversight to its affiliates, namely Adat Yeshua Messianic Synagogue, Norwich, Zera Avraham Messianic Synagogue, Coulsdon and a small community in Wales. Each affiliate synagogue operates as an independent charity registered with the Charities Commission.

The UBMS is an establishing member of the Union of Messianic Synagogues (UMS), to which currently no membership fees are paid.

## **Achievement of objectives and review of activities**

The UBMS objectives for the benefit of the public are set in the charity's Trust Deed and are summarised below:

- To advance the Jewish faith through the teachings of Yeshua the Messiah in such ways and in such parts of the United Kingdom or the world as the Trustees from time to time may think fit;
- To relieve sickness and financial hardship and to promote and preserve good health by the provision of funds, goods or services of any kind, including through the provision of counselling and support in such parts of the United Kingdom or the world as the Trustees from time to time may think fit;
- To train, teach and educate through regular conferences and dedicated seminars all those who seek to understand the Messianic Jewish faith and lifestyle;
- To train, teach and educate and have oversight over all national UK (and elsewhere as requested) congregational leaders; and
- To operate an accountability structure for all congregational leaders mentioned above.

The UBMS objectives are set to reflect its faith and community aims. Each year the Trustees review the objectives and activities of the charity to ensure they continue to reflect those aims. In carrying out this review the Trustees have considered the Charity Commission's guidance on public benefit and in particular its supplementary public guidance on the advancement of religion for the public benefit.

## **Conferences in 2019/20**

The UBMS was able to organise a Leaders weekend in February 2020 which was attended by the Rabbis, synagogue leaders and prospective leaders from the all UK congregations and also from abroad (Ukraine, Romania and Finland). The event was held at the synagogue in Norwich and provided the attendees with the opportunity to share and learn from each other, but also to spend free time together to socialise and build relationships.

As each year, the UBMS prepared for its annual weekend conference planned for May 2020. Unfortunately, the conference had to be cancelled due to the Covid-19 epidemic and the UK Government lockdown requirements.

Our experience shows that physical conferences not only help to build strong community relationships and educate visitors about various aspects of Messianic Judaism (such as theology and application of Messianic Jewish lifestyle), they are also a main source of programme funding through the offering and donation collections. As result, the donations received in 2019/20 were lower than in previous years.

## **Outreach**

The UBMS also continued to develop relationships with congregations across Europe and across the world. The UBMS visited the newly established Messianic community in Turku, Finland, but visits to Malta and Ukraine planned for 2020 had to be cancelled due to the travel restrictions imposed by Covid-19.

During the pandemic period, the outreach work of the Union continued largely online, with new contacts and relationships forged with communities in India, Kenya and Guatemala.

Due to Covid-19 this has been through virtual meetings as trips planned for Summer 2020 had to be cancelled. All of these leaders however were able to join us for the Leader's conference in February 2020.

## **Beth Din**

The UBMS operates a Beth Din which meets regularly to discuss Messianic Jewish Halacha, which applies to the affiliate synagogues.

## **Teaching and Education**

Only ordained rabbis and authorised leaders can teach or preach within the UBMS structure. This safeguards the access to our congregants and protects against harmful influences. The year saw an increase in the talents and abilities of the rabbis and affiliated leadership to teach and preach at public events and in the synagogues. During 2019/20, the Union Rabbis worked to develop a new Rabbinic Internship Training programme in order to

educate and prepare new generation of Rabbis, with the training planned to start in 2020/21.

The Gateway to Messianic Judaism programme which is used to educate those in our synagogues through the leaders and Rabbis has been updated and revised. The UBMS has continued with supporting the Finish community in its Gateway training programme, providing conversion and core vision to the trainees.

### **Development Plan**

We are in the third year of the UBMS 3-year plan. We continue to review all policies, especially focussing on those policies that are outward facing and dealing with vulnerability, as well as reviewing and renewing all time-constrained policies. A handful of new policies were added to the Handbook as required by law or as a result of strategic planning needs.

### **Plans for the future**

Within each of the UBMS's main categories the following are the short and medium-term goals:

- Development of existing and new relationships with congregations in Europe and beyond.
- Development of a future leadership programme for young members of the affiliated synagogues;
- Organisation of the annual conference in August 2021 and Leaders conference in Autumn 2021.
- Integrating new affiliate member congregations into the UBMS structure.

### **Financial review**

The main sources of income for the Charity are voluntary donations and synagogue subscription fees. The Charity (which acts as employer for the Rabbis of the member synagogues) also recharges the salary costs to the individual synagogues.

The salary income and expenditure form a significant proportion of the Charity's annual financial inflows and outflows. During 2019/20, the salary-related income was 89% of all income (£60,137 out of total £67,328), and the salary-related expenditure formed 90% of all financial outcomes (£60,376 out of total £66,924).

The charity received £1,882 in gifts and donations (compared to £3,178 in prior year). The decline was caused by cancellation of the annual conference, which is the main source of gifts and donations for the Union.

The Statement of Financial Activities for the year to 31 August 2020 is set out in an attached document. It shows an operating surplus of £404. This compares with the surplus of £4,163 in the prior year.

### **Reserves policy**

The reserves of the Charity should be held at £2,000 at any one point, if possible. The Charity has complied with the policy throughout the year. The Charity had no funds in deficit during the year.

The Charity currently makes no use of restricted funds.

### **Risk Management**

The UBMS Executive Team have examined the major strategic, business and operational risks faced by the UBMS and confirm that systems are in place, or arrangements have been established, to manage risks that have been identified. Appropriate DBS checks, supported by appropriate safeguarding policies, are made for those who work with children or vulnerable groups at UBMS events.

The UBMS is covered by Public Liability Insurance and appropriate Buildings and Contents insurance at the current HQ in Norwich.

This report was approved by the Trustees on 28 June 2021 and signed on its behalf by



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Lenka Carbonell Marvan (Chair)

# UNION OF BRITISH MESSIANIC SYNAGOGUES

(Charity no. 1116974)

## Receipts and payments accounts


For the period: 1 Sept 2019 - 31 August 2020



### 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 £
<b>A1 Receipts</b>					
Salaries	60,137	0	0	60,137	62,978
Gifts received	1,882	0	0	1,882	3,178
Other Income	2,293	0	0	2,293	11,746
Subscriptions & Mentoring	3,010	0	0	3,010	3,262
Interest received	6	0	0	6	7
<b>Sub total</b>	<b>67,328</b>	<b>0</b>	<b>0</b>	<b>67,328</b>	<b>81,171</b>
<b>A2 Asset and investment sales</b>					
	0	0	0	0	0
<b>Sub total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total receipts</b>	<b>67,328</b>	<b>0</b>	<b>0</b>	<b>67,328</b>	<b>81,171</b>
<b>A3 Payments</b>					
Salaries	60,376	0	0	60,376	62,851
Travels	3,143	0	0	3,143	2,442
Administrative Costs	1,431	0	0	1,431	1,162
Conference costs	1,700	0	0	1,700	10,365
Miscellaneous Expenses	244	0	0	244	114
Bank charges	30	0	0	30	75
Gifts (given)	0	0	0	0	0
<b>Sub total</b>	<b>66,924</b>	<b>0</b>	<b>0</b>	<b>66,924</b>	<b>77,009</b>
<b>A4 Asset and investment purchases</b>					
	0	0	0	0	0
<b>Sub total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total payments</b>	<b>66,924</b>	<b>0</b>	<b>0</b>	<b>66,924</b>	<b>77,009</b>
<b>Net of receipts/(payments)</b>	<b>404</b>	<b>0</b>	<b>0</b>	<b>404</b>	<b>4,163</b>
<b>A5 Transfers between funds</b>					
		0	0	0	0
<b>A6 Cash funds last year end</b>	12,349	0	0	12,349	8,186
<b>Cash funds this year end</b>	<b>12,753</b>	<b>0</b>	<b>0</b>	<b>12,753</b>	<b>12,349</b>

## 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 £
<b>B1 Cash funds</b>	Cash	305	0	0
	Current bank account	9,602	0	0
	Savings account	3,414	0	0
	Barclaycard	0	0	0
	Accounts Receivable	-1,092	0	0
	Paypal	524	0	0
	<b>Total cash funds</b>	<b>12,753</b>	<b>0</b>	<b>0</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK
	<b>Details</b>	<b>Unrestricted funds to nearest £</b>	<b>Restricted funds to nearest £</b>	<b>Endowment funds to nearest £</b>
<b>B2 Other monetary assets</b>		0	0	0
		0	0	0
		0	0	0
<b>B3 Investment assets</b>	<b>Details</b>	<b>Fund to which asset belongs</b>	<b>Cost (optional)</b>	<b>Current value (optional)</b>
			0	0
			0	0
<b>B4 Assets retained for the charity's own use</b>	<b>Details</b>	<b>Fund to which asset belongs</b>	<b>Cost (optional)</b>	<b>Current value (optional)</b>
			0	0
			0	0
			0	0
<b>B5 Liabilities</b>	<b>Details</b>	<b>Fund to which liability relates</b>	<b>Amount due (optional)</b>	<b>When due (optional)</b>
			0	
			0	
			0	
<b>Signed on behalf of all the trustees</b>	<b>Signature</b>	<b>Print Name</b>	<b>Date of approval</b>	
		Lenka Carbonell Marvan	18 Jun 2021	



# Independent examiner's report on the accounts

## Section A

### Independent Examiner's Report

Report to the trustees/  
members of

Union of British Messianic Synagogues.

On accounts for the year  
ended

31 August 2020

Charity no  
(if any)

1116974

Set out on pages

Respective responsibilities  
of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under section 144 (2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act;
- and to state whether particular matters have come to my attention.

Basis of independent  
examiner's statement

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

Independent examiner's  
statement

In connection with my examination, no matter has come to my attention, which gives me reasonable cause to believe that in, any material respect, the requirements:

- to keep accounting records in accordance with section 130 of the Charities Act; and
  - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act
- have not been met; or
1. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed:



Date:

29.6.2021

Name:

Ing. Iva Pokorná

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

Economist

Address:	Svatopluka Čecha 1d, Brno, 61200, Czech Republic

Section B	Disclosure
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Only complete if the examiner needs to highlight material problems.

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

No matters for disclosure noted.
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