

HEATON PARK HEBREW CONGREGATION

TRUSTEE REPORT FOR THE FINANCIAL YEAR-ENDED 31ST DECEMBER 2024

The Trustees present their report for the financial year-ended 31st December 2024

The Trustees confirm they comply with the Charities Commission.

Reference and Administrative Information

Charity Name Heaton Park Hebrew Congregation

Charity Registration Number 1159067

Principal Office Ashdown
84 Middleton Road
Crumpsall
Manchester
M8 4JX

Board of Trustees

Mr Alan Levy (Chair)

Dr Bryan Bennett

Mrs Hilary Foxler

Mr Ivor Rosenberg

Ms.Suzanne Kaye

Rabbi

Rabbi Daniel Walker M.A.

Administrators

Mrs Jacqueline Kremer

Mrs Sarah Heilpern

Honorary Solicitor Mr Joseph Foxler LLB

Auditors

Edwards Veeder (UK) Limited, Chartered Accountants

Ground Floor

4 Broadgate,

Broadway Business Park,

Chadderton,

Greater Manchester

OL9 9XA

Bankers

Barclays Bank

Structure, Governance and Management

Governing Document

Heaton Park Hebrew Congregation is a Charitable Incorporated Organisation (CIO) and was registered with the Charities Commission in November 2014, under charity number 1159067. It is governed by the Constitution of the Heaton Park Hebrew Congregation which was approved by the Charities Commission in November 2014.

Organisational Structure

The Charity Trustees are responsible for the general control and management of the Charity. The Trustees give their time freely and receive no remuneration or other financial benefits.

The Trustees meet as a body at least once every two months and are responsible for decisions or supervising decisions in relation to running the Synagogue, the community facilities and the activities provided by the Charity.

(See The Constitution sections 12, 13, 14, 15, 16, 17, 18, 19)

To assist in the smooth running of the Charity the trustees have delegated roles to an Executive Committee comprising of:

President, Vice-President, Warden, Treasurer and Hon. Secretary. There is also a Council comprising of up to 14 members of the Charity who meet once every two months and receive reports from the Executive about the running of the Charity along with monthly financial figures and the Council can ask questions and challenge any issues

The day-to-day management and running of the Charity are administered by staff employed by the Charity.

Recruitment and Appointment of Trustees

The Charity Trustees call an Annual General Meeting of Members of the C.I.O. the last Thursday before the festival of Shavuot, in accordance with the provisions laid down in the constitution. The following were elected at the A.G.M. held on Thursday 6th June 2024

Trustees: Dr Bryan Bennett, Mrs Hilary Foxler, Mr Alan Levy, Mr Ivor Rosenberg, Ms. Suzanne Kaye
Mr Levy continues as Chair of Trustees.

All the Trustees who were appointed are in possession of a satisfactory D.B.S.

The Trustees delegated duties to an Executive and Council who were elected at the A.G.M.

Executive: President: Mrs Hilary Foxler, Vice-President: Mr Robert Kanter, Warden: Mr Ivan Telzer,
Treasurer: Mr Alan Levy, Hon. Secretary: Mr Michael Goldstone.

Synagogue Council: Mr B. Bell, Mrs E. Bentley, Mr P. Bentley, Mr M. Dytych,
Mr E. Edwards, Dr M. Finlay, Mr Y. Finlay, Mr A. Franks, Mr M. Joseph, Mr S. Levine, Mr H. Lisberg,
Mr A. Loofe, Mr D. Marks, Mr O. Shtrozberg, Mrs G. Simon, Mr I. Telzer.

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Monthly Coffee mornings: The purpose of these is to encourage the elderly members of our community to come along and to socialise. Many of these are unable to attend Synagogue on Shabbos as they are unable to walk to the Synagogue. The coffee mornings are an opportunity for them to speak to the Rabbi. Often a guest speaker attends. The Synagogue provides transport for those who need it. Residents of Heathlands Care Home are invited, many of whom are members of the Synagogue; they are brought by their care workers.

Links with Langdon Community College: This is a college for young adults with special needs; they are aged 18yrs-21yrs. The students along with their care workers are welcome to attend the Synagogue for any of the religious services and activities/events the Synagogue hold.

CTEENS is a youth organisation which engages with teenagers to give them experiences and knowledge and understanding of Orthodox Judaism. Once every 2 weeks during school term time CTEens bring pupils from the local Jewish school for a lunch and learn at our Synagogue social hall. The pupils partake in Pizza and Chips brought in from a local kosher restaurant and learn about aspects of Judaism whilst in a relaxed and informal setting. Many of the pupils that attend are from families who are members of the Synagogue.

Partnership with other agencies: The Synagogue communicates and works with other outside agencies to help benefit the community. We have close links with local Jewish care homes, in particular Heathlands Village which also houses The FED.

The Rabbi visits some of the local Jewish Schools; some of the children's families are members of our Synagogue. He is also the religious advisor to one of the local Jewish school's.

The Friendship circle, an organisation that supports young adults with special needs, join with us to do some events. For example, Mitzvah Day (an annual event in November) when collections of non-perishable food, toiletries, clothes in good condition took place in the synagogue social hall and this was all distributed to a food bank, the homeless and other charities.

On Christmas day our social hall was used by the Manchester Jewish Rep. Council as the North Manchester Hub for volunteers to collect bouquets of chocolate which they delivered to local hospitals, fire stations and care homes to say thank you to those who care for and help our community.

The Rabbi regularly visits our members who are in hospital and the hospital staff will also call upon him if he is needed to visit a patient requiring a Rabbi or if the hospital staff or patient's relative need guidance on the religious rituals when dealing with certain situations e.g. death of a patient.

Financial Review:

Principal Funding Sources

The Charity's main source of income is from Membership fees. Membership income contributed was £201,607. Gift aid brought in £38,070 and remaining income was derived from donations and fundraising.

Reserves Policy

The net assets are £332,718 of which £270,827 are unrestricted funds and £61,891 are restricted funds.

Restricted Funds: These comprise of reserves for Burial of £10,000.00 Buildings of £50,000.00 Children's fund of £1,033. Rabbi's book fund of £858.00

Fixed Assets:

Those amount to £302,812 which comprise of the land and building at cost and investments of £215,00.00 (COIFF and Cambridge & Counties Bank).

Plans For The Future:

We aim to expand on the activities we already provide. We aim to increase fund raising activities for the Synagogue to have monies to continue to provide, improve and expand on the service we provide for our members.

We aim to expand and improve the pastoral service to our members.

We aim to expand our membership and increase the number of young people becoming members of the Synagogue. Trustees recognise many of our elder members have passed away however we had several new members join the organisation. Trustees continue to look at options to develop the Synagogue to meet the needs/wants of our Membership and the wider community. Trustees are mindful of the age profile and the demographics of the organisation for the purpose of strategic

planning. It has been identified that the local demographics has very quickly changed over recent years, and the population of mainly young Charedi families is continuously growing. Some of these men continue to attend Friday night prayers at our Synagogue and have been welcomed into our community. They also support the daily prayers (Minyan). Since September 2024 an Early Sabbath morning service is held in the Bet Hamidrash which is attended specifically by this group who are able to pray using the style of prayers they like. Some of these people have become members of the organisation but on a very reduced rate. There are some who have made one off donations.

Statement of Trustees' Responsibilities:

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with regulations of the Charities Commission.

The Trustees are responsible for safeguarding the assets of the charity and hence taking reasonable steps for the prevention and detection of fraud and other irregularities.

The year-end accounts for 31st December 2024 were prepared by Edwards Veeder (UK) Ltd., and these were discussed and approved and signed by the Trustees at a meeting of Trustees held on 20th March 2025. The year-end accounts were sent via post to all members of the organisation on 24th April 2025. Members were invited to contact the Treasurer if they wished to ask any questions relating to the year-end accounts prior to the A.G.M. on 22nd May 2025. With the notice of the A.G.M. the Trustees attached a letter to members explaining the reason for the proposed motion to increase the membership fees as from 1st July 2025.

The Trustees were concerned that they had to report that the year-end accounts, 31st December 2024 show a deficit of £6,000. This was despite continued reviewing of all contracts and suppliers and where necessary changing suppliers for utilities and other supplies, good housekeeping and a lot of time and effort in trying to reduce debtors. There are still a number of members who haven't increased their membership payments from when there was an increase in fees from January 2023.

The financial figures are being reviewed monthly. The Trustees are being active in recovering debts from members who owe fees, they have delegated help with this from a member of the Synagogue Council who is experienced in such matters. The Trustees are continually looking at ways to decrease our expenses and increase our income.

Fundraising activities are being planned. We are also encouraging more sponsorship for events and weekly Kiddushim (food following Sabbath day prayers).

The Trustees recognise their responsibility to ensure they comply with Health and Safety regulations, including safeguarding; policies are reviewed and updated as required and Staff and volunteers are aware of such.

Chair of Trustees and the President have attended courses and information sessions to update their knowledge and skills in relation to being a Trustee of a C.I.O. and their roles and responsibilities.

Approved by the Trustees and signed on their behalf by:

Alan Levy

Alan Levy (Chair)
September 2025

HEATON PARK HEBREW CONGREGATION

FINANCIAL STATEMENTS

31 DECEMBER 2024

EDWARDS VEEDER (UK) LIMITED

Chartered Accountants
4 Broadgate
Broadway Business Park
Chadderton
Oldham
OL9 9XA

HEATON PARK HEBREW CONGREGATION
FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31ST DECEMBER 2024

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HEATON PARK HEBREW CONGREGATION
INDEPENDENT EXAMINERS REPORT TO THE TRUSTEES
FOR THE YEAR ENDED 31ST DECEMBER 2024

We report on the accounts of the Trust for the year ended 31 December 2024, which are set out on pages 3 to 6.

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 the year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is our 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 Act; and
- to state whether particular matters have come to our attention.

Basis of independent examiner's report

Our examination was carried out in accordance with the 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 to any unusual items or disclosures in the accounts, and seeking explanations from you as 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 our examination, no matter has come to our attention:

(1) which gives us reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with section 130 of the 2011 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

have not been met; or

(2) to which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Edwards Veeder (UK) Limited

Edwards Veeder (UK) Limited

Chartered Accountants

4 Broadgate

Broadway Business Park

Chadderton

Oldham

OL9 9XA

... 22 May 2025

HEATON PARK HEBREW CONGREGATION
STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31ST DECEMBER 2024

	Unrestricted Funds	Restricted Funds	Total Funds 2024	Total 2023
	£	£	£	£
<u>INCOME AND EXPENDITURE</u>				
<u>INCOMING RESOURCES</u>				
Members Subscriptions	201,607		201,607	201,355
Donations and Offerings	23,241	115	23,356	11,861
Barmitzvahs and Weddings	910		910	900
Burial Charges. Permits and Memorials	2,224		2,224	23,911
Covenants and Gift Aid	38,070		38,070	30,578
Investment Income	9,422		9,422	5,927
Kiddushim, Sholashudos and Hall Hire	2,746		2,746	4,230
Sundry Income and Fundraising	4,973		4,973	8,809
Total Incoming Resources	283,193	115	283,308	287,571
<u>RESOURCES EXPENDED</u>				
Employment Costs	153,681		153,681	149,416
Light, Heat and Water	15,964		15,964	17,443
Advertising, Postage and Stationery	5,579		5,579	4,661
Ground Rent, Rates and Insurance	11,635		11,635	13,445
Telephone & IT charges	5,793		5,793	5,909
Presentations and Plaques	321		321	957
Wedding Expenses	1,084		1,084	344
Funeral Costs and Cemetery Maintenance	41,298		41,298	34,158
Social Expenses	26,940		26,940	22,620
Professional fees	637		637	779
Repairs and Renewals	5,957		5,957	6,393
Security Costs	3,773		3,773	1,608
Subscriptions, Donations and Affiliation Fees	1,500		1,500	2,378
Depreciation	3,890		3,890	3,110
Sundry Expenses	11,198		11,198	9,683
Total Resources Expended	289,250		289,250	272,904

THE STATEMENT OF FINANCIAL ACTIVITIES CONTINUES ON THE NEXT PAGE

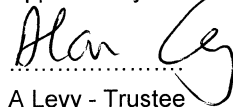
HEATON PARK HEBREW CONGREGATION
STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31ST DECEMBER 2024

	Unrestricted Funds	Restricted Funds	Total Funds 2024	Total Funds 2023
	£	£	£	£
NET OUTGOING/INCOMING RESOURCES BEFORE TRANSFERS	-6,057	115	-5,942	14,667
TRANSFERS BETWEEN FUNDS				
NET MOVEMENT IN FUNDS	-6,057	115	-5,942	14,667
BALANCES BROUGHT FORWARD	276,884	61,776	338,660	323,993
BALANCES CARRIED FORWARD	270,827	61,891	332,718	338,660

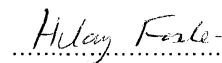
HEATON PARK HEBREW CONGREGATION**BALANCE SHEET****AS AT 31ST DECEMBER 2024**

	<u>Notes</u>	<u>2024</u> £	<u>2023</u> £
<u>FIXED ASSETS</u>			
Cemetery Land	1	5	5
Tangible Fixed Assets	2	87,807	77,161
Investments	3	215,000	215,000
		<u>302,812</u>	<u>292,166</u>
<u>CURRENT ASSETS</u>			
Debtors		18,729	16,777
Prepaid expenses		72	1,424
Cash at Bank and in Hand		31,675	41,796
		<u>50,476</u>	<u>59,997</u>
<u>Deduct:-</u>			
<u>CURRENT LIABILITIES</u>			
Amounts falling due within one year:-			
Charity appeals		11,255	9,872
Accrued Charges		9,315	3,631
		<u>20,570</u>	<u>13,503</u>
<u>NET CURRENT ASSETS</u>		<u>29,906</u>	<u>46,494</u>
<u>NET ASSETS</u>		<u>332,718</u>	<u>338,660</u>
<u>FUNDS</u>			
Unrestricted		270,827	276,884
Restricted	4	61,891	61,776
		<u>332,718</u>	<u>338,660</u>

Approved by the Board of Trustees on2025 and signed on its behalf



A Levy - Trustee



H Foxler - Trustee

HEATON PARK HEBREW CONGREGATION
NOTES ON THE ACCOUNTS
FOR THE YEAR ENDED 31ST DECEMBER 2024

	<u>2024</u>	<u>2023</u>
	£	£
1. <u>CEMETERY LAND</u>		
At Cost		
Rainscough	461	461
Agecroft	3,250	3,250
	<u>3,711</u>	<u>3,711</u>
<u>Less:-</u>		
Depreciation	3,706	3,706
	<u>5</u>	<u>5</u>
 2. <u>TANGIBLE FIXED ASSETS</u>		
At Cost		
Buildings	70,504	70,504
Bungalow	1,742	1,742
Seating, Furniture, Fixtures and Equipment	73,574	59,037
	<u>145,820</u>	<u>131,283</u>
<u>Less:-</u>		
Depreciation	58,013	54,122
	<u>87,807</u>	<u>77,161</u>
 3. <u>INVESTMENTS</u>		
COIF	135,000	135,000
Cambridge and Counties Bank	80,000	80,000
	<u>215,000</u>	<u>215,000</u>
 4. <u>RESTRICTED FUNDS</u>		
Burial Reserve	10,000	10,000
Buildings Reserve	50,000	50,000
Childrens Fund	1,033	918
Rabbi's Book Fund	858	858
	<u>61,891</u>	<u>61,776</u>

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Community Activities:

The Heaton Park Hebrew Congregation "Community Group" has now officially been running for two years and the small group of volunteers along with the Rabbi identify and reach out to those of our members who are in need/wanting someone who will befriend them by giving them a phone call or visit. If the volunteers are concerned about someone or feels they may benefit from help they report this to the Rabbi or The President (both of whom are also deputy safeguarding persons). All are mindful of the importance of confidentiality.

Monthly Coffee mornings: The purpose of these is to encourage the elderly members of our community to come along and to socialise. Many of these are unable to attend Synagogue on Shabbos as they are unable to walk to the Synagogue. The coffee mornings are an opportunity for them to speak to the Rabbi. Often a guest speaker attends. The Synagogue provides transport for those who need it. Residents of Heathlands Care Home are invited, many of whom are members of the Synagogue; they are brought by their care workers.

Links with Langdon Community College: This is a college for young adults with special needs; they are aged 18yrs-21yrs. The students along with their care workers are welcome to attend the Synagogue for any of the religious services and activities/events the Synagogue hold.

CTEENS is a youth organisation which engages with teenagers to give them experiences and knowledge and understanding of Orthodox Judaism. Once every 2 weeks during school term time CTEens bring pupils from the local Jewish school for a lunch and learn at our Synagogue social hall. The pupils partake in Pizza and Chips brought in from a local kosher restaurant and learn about aspects of Judaism whilst in a relaxed and informal setting. Many of the pupils that attend are from families who are members of the Synagogue.

Partnership with other agencies: The Synagogue communicates and works with other outside agencies to help benefit the community. We have close links with local Jewish care homes, in particular Heathlands Village which also houses The FED.

The Rabbi visits some of the local Jewish Schools; some of the children's families are members of our Synagogue. He is also the religious advisor to one of the local Jewish school's.

The Friendship circle, an organisation that supports young adults with special needs, join with us to do some events. For example, Mitzvah Day (an annual event in November) when collections of non-perishable food, toiletries, clothes in good condition took place in the synagogue social hall and this was all distributed to a food bank, the homeless and other charities.

On Christmas day our social hall was used by the Manchester Jewish Rep. Council as the North Manchester Hub for volunteers to collect bouquets of chocolate which they delivered to local hospitals, fire stations and care homes to say thank you to those who care for and help our community.

The Rabbi regularly visits our members who are in hospital and the hospital staff will also call upon him if he is needed to visit a patient requiring a Rabbi or if the hospital staff or patient's relative need guidance on the religious rituals when dealing with certain situations e.g. death of a patient.

Financial Review:

Principal Funding Sources

The Charity's main source of income is from Membership fees. Membership income contributed was £201,607. Gift aid brought in £38,070 and remaining income was derived from donations and fundraising.

Reserves Policy

The net assets are £332,718 of which £270,827 are unrestricted funds and £61,891 are restricted funds.

Restricted Funds: These comprise of reserves for Burial of £10,000.00 Buildings of £50,000.00 Children's fund of £1,033. Rabbi's book fund of £858.00

Fixed Assets:

Those amount to £302,812 which comprise of the land and building at cost and investments of £215,00.00 (COIFF and Cambridge & Counties Bank).

Plans For The Future:

We aim to expand on the activities we already provide. We aim to increase fund raising activities for the Synagogue to have monies to continue to provide, improve and expand on the service we provide for our members.

We aim to expand and improve the pastoral service to our members.

We aim to expand our membership and increase the number of young people becoming members of the Synagogue. Trustees recognise many of our elder members have passed away however we had several new members join the organisation. Trustees continue to look at options to develop the Synagogue to meet the needs/wants of our Membership and the wider community. Trustees are mindful of the age profile and the demographics of the organisation for the purpose of strategic

planning. It has been identified that the local demographics has very quickly changed over recent years, and the population of mainly young Charedi families is continuously growing. Some of these men continue to attend Friday night prayers at our Synagogue and have been welcomed into our community. They also support the daily prayers (Minyan). Since September 2024 an Early Sabbath morning service is held in the Bet Hamidrash which is attended specifically by this group who are able to pray using the style of prayers they like. Some of these people have become members of the organisation but on a very reduced rate. There are some who have made one off donations.

Statement of Trustees' Responsibilities:

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with regulations of the Charities Commission.

The Trustees are responsible for safeguarding the assets of the charity and hence taking reasonable steps for the prevention and detection of fraud and other irregularities.

The year-end accounts for 31st December 2024 were prepared by Edwards Veeder (UK) Ltd., and these were discussed and approved and signed by the Trustees at a meeting of Trustees held on 20th March 2025. The year-end accounts were sent via post to all members of the organisation on 24th April 2025. Members were invited to contact the Treasurer if they wished to ask any questions relating to the year-end accounts prior to the A.G.M. on 22nd May 2025. With the notice of the A.G.M. the Trustees attached a letter to members explaining the reason for the proposed motion to increase the membership fees as from 1st July 2025.

The Trustees were concerned that they had to report that the year-end accounts, 31st December 2024 show a deficit of £6,000. This was despite continued reviewing of all contracts and suppliers and where necessary changing suppliers for utilities and other supplies, good housekeeping and a lot of time and effort in trying to reduce debtors. There are still a number of members who haven't increased their membership payments from when there was an increase in fees from January 2023.

The financial figures are being reviewed monthly. The Trustees are being active in recovering debts from members who owe fees, they have delegated help with this from a member of the Synagogue Council who is experienced in such matters. The Trustees are continually looking at ways to decrease our expenses and increase our income.

Fundraising activities are being planned. We are also encouraging more sponsorship for events and weekly Kiddushim (food following Sabbath day prayers).

The Trustees recognise their responsibility to ensure they comply with Health and Safety regulations, including safeguarding; policies are reviewed and updated as required and Staff and volunteers are aware of such.

Chair of Trustees and the President have attended courses and information sessions to update their knowledge and skills in relation to being a Trustee of a C.I.O. and their roles and responsibilities.

Approved by the Trustees and signed on their behalf by:

Alan Levy

Alan Levy (Chair)
September 2025