# THE JO COX FOUNDATION

England & Wales · Charity number 1170836

## Details

| | |
|---|---|
| **Status** | Registered |
| **Legal form** | Charitable company |
| **Company number** | 10392667 |
| **Registered** | 2016-12-19 |
| **Register** | View on the Charity Commission register |

## Contact

| | |
|---|---|
| **Address** | 2 Work<br>Cutter Mill<br>Tileyard North<br>Wakefield<br>WF1 5FY |
| **Phone** | +44(0)3330902784 |
| **Email** | info@jocoxfoundation.org |
| **Website** | https://www.jocoxfoundation.org/ |

## Activities

**Objects:** THE OBJECTS OF THE CHARITY ARE FOR THE PUBLIC BENEFIT TO FURTHER SUCH PURPOSES AS ARE EXCLUSIVELY CHARITABLE IN ACCORDANCE WITH THE LAWS OF ENGLAND AND WALES.

**Activities:** The Jo Cox Foundation's mission is to inspire and galvanise positive change at local, national and international levels in through building stronger communities, a better public life and a fairer world in Jo Cox's honour.

## Classification

- **How:** Provides Advocacy/advice/information, Sponsors Or Undertakes Research, Other Charitable Activities
- **What:** General Charitable Purposes
- **Who:** The General Public/mankind

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## Geography

- Scotland
- Throughout England And Wales

## Finances

| Period end | Income | Expenditure | Assets | Employees |
|---|---|---|---|---|
| 2024-12-31 | £534,915 | £590,744 | £242,625 | 15 |
| 2023-12-31 | £684,727 | £648,914 | £298,454 | 16 |
| 2022-12-31 | £629,515 | £591,489 | £262,641 | 12 |
| 2021-12-31 | £734,379 | £742,691 | £224,615 | 12 |
| 2020-12-31 | £749,680 | £649,304 | £232,927 | 11 |

## Trustees

| Name | Role | Appointed |
|---|---|---|
| **Baroness Janet Anne Royall** | Chair | 2025-09-15 |
| Amanda Nicola Chetwynd-Cowieson | | 2022-02-08 |
| Dame Tracey Crouch | | 2026-03-05 |
| Eloise Karen Todd | | 2016-09-01 |
| Geethika Jayatilaka | | 2022-04-01 |
| Jane Claire Brady | | 2024-11-04 |
| Nisha Aileen Jaydev Jani | | 2022-02-08 |
| Rachel Kinnock | | 2025-02-27 |
| Rosamund Evelyn Blomfield-Smith | | 2020-09-10 |
| Samantha Jayne Vickers | | 2019-01-14 |
| Seema Louise Ghiassi Clark | | 2026-03-05 |
| Steve John Morris | | 2018-05-01 |

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**THE JO COX FOUNDATION**

England & Wales - Charity number 1170836

# Accounts

THE JO COX FOUNDATION

# TRUSTEES' ANNUAL REPORT AND FINANCIAL STATEMENTS

## FOR THE YEAR ENDED 31 DECEMBER 2024








THE JO COX FOUNDATION

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# INTRODUCTION FROM THE INTERIM CHAIR

## ROSAMUND BLOMFIELD-SMITH



2024 was a significant year for the Foundation. This was especially true for our Respectful Politics work. In January 2024 we published *No Place in politics: tackling abuse and intimidation*.

This report from The Jo Cox Civility Commission explores the issue of abuse and intimidation of elected representatives here in the UK, which we are clear presents a real threat to our democracy.

The report and our 28 recommendations for addressing this growing issue were launched at an event in Parliament, and we were pleased to receive cross-party support, including from four former Prime Ministers. But the work does not end here, and raising awareness, and pushing for the recommendations to be adopted have been central to our work in 2024.

We are also pleased to have delivered so much work in our Stronger Communities strand, as always guided by Jo's words that "we have more in common than that which divides us". We again delivered the Great Get Together, we've welcomed new partnerships and groups to our More in Common Network, and we've begun an exciting new project in West Yorkshire to listen to communities in Batley, Dewsbury and Heckmondwike and develop a shared community vision for the area.

Despite these successes, it was also a challenging year and a time of change for the Foundation. We said goodbye to Jacqui Smith, who chaired the Foundation with great distinction for five years.

We also said goodbye to a number of excellent staff members, as we worked to ensure that the Foundation remains financially stable in a challenging fundraising environment. I'd like to especially thank our former Chief Executive, Su Moore, for all that she did to further Jo's legacy in her time leading the Foundation.

I'd like to say a particular thank you to our funders and partners - without you none of our work would be possible. Thank you also to the dedicated staff of the Foundation who carry out its work with unfailing commitment and passion.

# ABOUT THE JO COX FOUNDATION




**Jo Cox was a passionate campaigner, activist and humanitarian; a proud Yorkshire lass and internationalist; and a devoted mum, daughter, sister, wife, friend and MP.**

The Jo Cox Foundation makes meaningful change on issues that Jo was passionate about. Like Jo, we believe that a kinder, fairer and more connected world is possible. Underpinning this belief is the understanding that we have more in common than that which divides us. As we work to make change, we follow Jo's example of collaborating with others and bringing people together to achieve more than we can alone.

We work in three areas. We nurture stronger communities, champion civility in politics and advocate for a fairer world.

We focus on making change led by the values by which Jo lived her life and are guided by the following principles:

**Ambitious**
**This means:** We believe, like Jo, that there should be no 'too difficult to deal with' pile

**Collaborative**
**This means:** We believe that achieving real change requires us all to pool our strengths and exchange our skills and resources

**Empathetic**
**This means:** We believe that kindness and compassion are signs of strength, and that it is only by understanding others that we can build relationships and bridge divides

THE JO COX FOUNDATION

# STRONGER COMMUNITIES

**We want less lonely, better connected communities across the UK, where everyone feels that they belong.**

During 2024 our Stronger Communities work spanned:

- The Great Get Together and Great Winter Get Together campaigns, aimed at bringing communities together, united by Jo's words that 'we have more in common than that which divides us'
- The More in Common network of volunteer-led groups around the UK, committed to bridging divides in their communities
- Our work in West Yorkshire, centred in Batley and Spen, Jo's constituency
- The Connection Coalition, bringing together 1000 members who work on issues related to loneliness and social connection

The following is a summary of our achievements over the last 12 months.

## THE GREAT GET TOGETHER

In June, the Great Get Together once again demonstrated the desire of communities around the UK to come together to celebrate what unites us, and reject division. This year was particularly meaningful as the Great Get Together took place on Jo's 50th birthday.



"It reminded everyone no matter what race, religion, ethnicity we belong to, humanity comes first. **We are all humans** and everyone deserves to be treated with kindness and respect.

When you start talking and interacting you realise **we all have more in common than we think.**

**Great Get Together organiser**

626 events took place, with an estimated 97,600 attendees, bringing together thousands of people that had never met before. People described how 'neighbours met up and got to know each other better', making new friends and feeling inspired to stay more connected with each other.

We also saw a huge increase in volunteering, with local projects reporting a 40% increase in volunteers after they had held a Great Get Together event.

## THE MORE IN COMMON NETWORK

The More in Common Network has continued to grow during 2024.

Thanks to funding from the National Lottery Community Fund, we have continued to support our More in Common partnerships, which bring together organisations to carry out work to support social cohesion in their area.

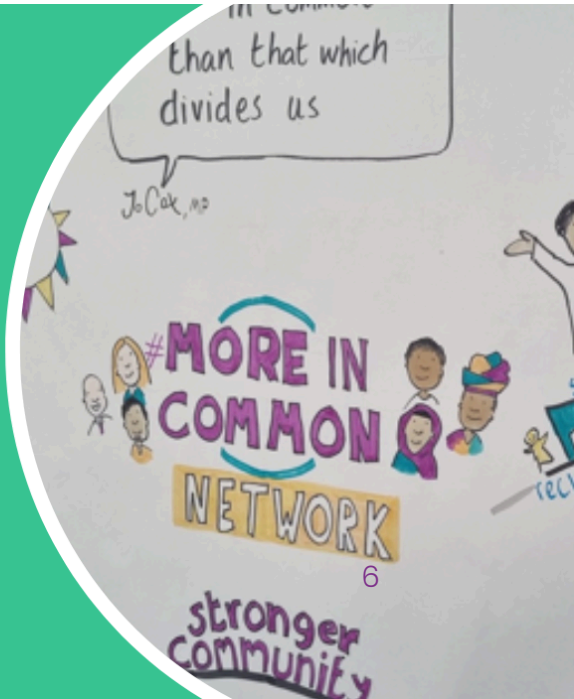
Our two established partnerships - in Cardiff and Nottingham - have continued to go from strength to strength, and we've begun establishing two new partnerships in Greater Manchester and Staffordshire.

Alongside this our More in Common groups, which are made up of individuals who carry out activity in their local area to bring Jo's 'more in common' message to life, have also flourished. The total number of groups has increased from 10 to 14, with new groups in Manchester, the East End, Leighton Buzzard and Nottingham.

Throughout the year, we've supported the Network through one-to-one support, resources and a programme of events.

> It has helped me feel like **part of something** else and not trying to achieve things on our own. It has been beneficial to smaller organisations as well.
>
> It has restarted connections that had dried up.
>
> We were aware of each other, but now **better understand each other's needs** and this has built trust.

**Member of More in Common Cardiff Partnership**



# WORK IN WEST YORKSHIRE

During 2024 the focus of our work in Jo's home and former constituency in West Yorkshire has focussed on an exciting new project: Bridging and Belonging.

Beginning in May 2024, through this project we will organise a series of listening events in Heckmondwike, Batley and Dewsbury. These will provide a space where local people from all parts of the community can share their hopes for how the community can develop.

By carrying out this listening exercise, we will lead the process of co-creating a shared community vision for the three towns by the end of 2025. We will then intend to seek further funding in order to support community members to develop and lead their own social action projects that will contribute to achieving this vision.

During the second half of 2024 we have worked to set up the project, including establishing a community group who will inform the project's direction, lead the listening events and analyse what we hear to produce the shared vision.

Alongside our work on the Bridging & Belonging project, we supported community organisations across the region to connect and collaborate through three community lunches that we hosted - one each in Batley, Dewsbury and Leeds.

By using the Great Get Together as an engagement hook, these events brought together 157 people from community organisations as an opportunity to connect, learn what we have in common, and work together to overcome our shared challenges.



'I want to talk about strength and collaboration. I see that every time we meet. The strength that we've got, the real respect for one another.

And I think it is that feeling of collaboration that is our greatest strength, and we can be sure from the results and the people that we've connected with, we're passionate about making a difference.

**Bridging & Belonging Community Group member**

# THE CONNECTION COALITION AND LONELINESS ADVOCACY

Founded at the start of the pandemic, the Connection Coalition remained a vital part of the loneliness sector through the Covid pandemic and the cost of living crisis. Through this time we maintained a membership of almost 1000 members, with feedback from some members that taking part has been life-changing for them.

Having decided that, after four years of crisis response, it was time to end the Coalition, we focused on closing it, and formally concluded its work in June 2024.

This is, however, not the end of our work to support the loneliness sector and advocate for action on loneliness. During 2024 we have sustained our excellent relationships with the Minister for Loneliness and key civil servants, and made the most of them to inform debates and discussions on the response to loneliness.

The strength of this relationship, and the resulting ability to effect positive action, was shown in our work in the first half of the year to highlight the ongoing financial challenges facing the loneliness sector and the risk to many organisations sustainability. This led directly to the government at the time hosting a funders roundtable to seek to unlock further funding to address loneliness.

Following the 2024 general election, we have focussed on establishing our relationship with the new Minister for Loneliness. We are also pleased to have secured new funding to establish a Loneliness Policy Action Group for the voluntary sector, which will be the focus of our work on this issue in 2025.

> Creating the space you have done will go on to have ripples farther than you will know. It's a revolutionary thing in these times to create space for support and community, championing those doing the hard work of creating the vital connection we need in this country.
>
> **Connection Coalition member**



THE JO COX FOUNDATION

# RESPECTFUL POLITICS

**We want anyone, regardless of their background, to feel able to participate in our political discourse and be treated with respect. In particular, we seek to end the abuse and intimidation that discourages so many from entering political life, and especially impacts diverse representation.**

2024 was another important year for our Respectful Politics work. In January 2024 we launched the report of The Jo Cox Civility Commission: *No place in politics: tackling abuse and intimidation*.

This pivotal report examined the issue of abuse and intimidation of elected representatives, and also our call to action, with 28 cross-sector recommendations for how we can address this growing threat to our democracy.

Our subsequent work has focussed on advocating for their adoption in order to drive short- and long-term change on this issue. We are pleased that a number of key recommendations have been implemented during 2024, including:

- The introduction of Operation Ford to provide specific police support to local elected representatives for the first time.
- Updated training and resources for police officers and parliamentarians.
- The exemption of candidate safety costs from election spending limits.
- Expanded guidance for candidates about the use of social media produced by the Electoral Commission.



> Abuse and intimidation of elected politicians is **a genuine threat to democracy** in this country and **now is the time to act** if we want to prevent elected representatives from stepping down and ensure a diverse and talented future pipeline of politicians.
>
> **Jacqui Smith, former Chair of Trustees**

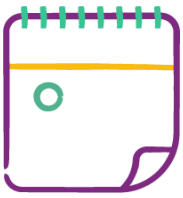
As we move into 2025 we will continue to advocate for the remaining recommendations of the Civility Commission to be adopted. Next year our work in this area will particularly focus on supporting the family and staff of elected representatives, advocating for political parties to take further action, and developing specific recommendations for devolved parliaments.

2024 also saw a number of elections, including local council elections, mayoral elections and the general election in July 2024. In partnership with Compassion in Politics, we were again pleased to run our civility pledge campaign, encouraging candidates to commit to carrying out a civil campaign.

We were also pleased to join with the Electoral Commission, the City of London Police and the Committee on Standards in Public Life to call for a general election campaign free from candidate abuse.



THE JO COX FOUNDATION



# PRIORITIES FOR 2025

In 2025 we continue to make positive change on issues that Jo was passionate about. We are placing particular focus on:

- Campaigning for the **Jo Cox Civility Commission's** recommendations to be adopted, with a particular focus on staff and families, political parties, and devolved parliaments.

- Continuing our work to be the **leading voice on the issue of abuse and intimidation** in politics, raising awareness of the issue, and the impact on democracy.

- Developing a **shared community vision** for Heckmondwike, Dewsbury and Batley as we continue listening to truly understand the needs and concerns of our local communities in West Yorkshire.

- Convening a new Loneliness Policy Action Group to **advocate for ongoing government action** on the issue of loneliness.

- Expanding the **More in Common Partnership model**, learning from our existing Partnerships, and building new relationships in other geographic areas.

# SUPPORTERS

We would like to thank everyone who supported our work in 2024, particularly our dedicated and hard-working staff team. Without them, we couldn't achieve any of our work on issues that Jo was passionate about.

## FUNDERS AND PARTNERS

### Charitable trusts and foundations

- Abbey House Settlement
- The Astra Foundation
- Joseph Rowntree Reform Trust
- National Lottery Community Fund - Bringing People Together
- National Lottery Community Fund - Reaching Communities
- The Newby Trust
- Worldwide Support for Development

### Corporates and other organisations

- Breathe HR
- Brunswick Group Advisory
- GMB Newcastle
- Lloyds Bank Foundation
- Neue Schule
- Salesforce
- Sovereign Healthcare
- WA Communications

### Government and public sector

- Babergh District Council
- Bassetlaw District Council
- Broxtowe Borough Council
- Caerphilly County Borough Council
- Cardiff Council
- East Riding of Yorkshire Council
- Falkirk Council

- Knowsley Council
- London Borough of Merton
- Mid Suffolk District Council
- South Ribble Borough Council
- Southend City Council
- Stroud District Council
- West Lothian Council

### Community events

Our thanks to everyone who participated in our two main community events in 2024: the Jo Cox Way and the Royal Parks Half Marathon. We'd also like to thank all of those who undertook to use their Great Get Together as a way to fundraise for us, and all of those who undertook their own fundraising for the Foundation.

### Individual donors

We continue to receive support from many individuals, including those who choose to make regular donations to us as Friends of the Jo Cox Foundation. We would like to thank all of those who donated to us in 2024.

# FINANCIAL REVIEW

### Funds raised

Total income for the year was £534,915 (2023: £684,727); of which unrestricted income was £173,061 (2023: £229,496) and restricted income was £361,854 (2023: £455,231).

### Expenditure

Total expenditure was £590,744, (2023: £648,914); of which unrestricted expenditure was £244,889 (2023: £177,169) and restricted expenditure was £345,855 (2023: £471,745).

### Surplus/deficit

This resulted in a deficit for the year of £55,829 (2023: surplus of £35,813).

## RESERVES POLICY

JCF's reserves policy has been devised by analysing the charitable company's main financial obligations now, and in the future, the cost of reshaping the charitable company and the scale of risk to voluntary income to calculate a target sum of unrestricted funds to be held in reserve. Such a sum should be sufficient to ensure the continued operation of the charitable company in the medium term in the event of a drop in generated income.

The level of free reserves is continually monitored. It is monitored monthly by management as part of their review of the management accounts, and is reported to all meetings of both the Finance, Audit and Risk Committee and the full Board, so that Trustees can monitor and manage reserves effectively.

The target level of free reserves has been set as between three and six months' expenditure based on the approved budget for the following 12 months.

The target for 31 December 2024 was set at a range of £109,102 to £218,204 in free reserves. At 31 December 2024, JCF held £75,945 in free reserves (2023: £139,868).

## REVIEW OF CURRENT FINANCIAL POSITION

Like many organisations in the voluntary sector, we have found the current financial environment to be extremely challenging.

In order to reduce the organisation's operating deficit, the Board of Trustees undertook a restructure of the staff team in the second half of the year, as well as reviewing other areas in which the organisation could reduce its costs.

This has had the intended effect of ensuring the organisation's financial stability. As a result, we currently expect to increase our free reserves in 2025.

# STRUCTURE, GOVERNANCE AND MANAGEMENT

## GOVERNING DOCUMENT

The Jo Cox Foundation is a charitable company, limited by guarantee, incorporated on 23 September 2016, and registered as a charity on 19 December 2016.

The company was established under a Memorandum and Articles of Association, which established the objects and powers of the charitable company, as amended by special resolution on 16 January 2018.

## GOVERNANCE

The charitable company is governed by its Trustees. The Trustees also act as the members of the charitable company and its corporate Directors for the purposes of the Companies Act 2006. The Articles of Association outline the powers, responsibilities and decision-making processes of the Trustees.

## RECRUITMENT AND APPOINTMENT OF TRUSTEES

The process for appointing Trustees to the Board of The Jo Cox Foundation is outlined in the Articles of Association, which specifies that any person who is willing to act as a Trustee and who would not be disqualified from acting may be appointed by a decision of the Trustees.

There is no requirement for how Trustees should be recruited, and this will normally be considered on a case-by-case basis as vacancies arise. It includes a combination of open recruitment and direct approaches to suitable candidates.

## TRUSTEE INDUCTION AND TRAINING

Trustees are provided with a clear role description, outlining their statutory and additional responsibilities. New Trustees are provided with a thorough induction, including spending time with the CEO and Head of Ops and Finance. All Trustees are encouraged to take up relevant training and development to fulfil their role and responsibilities to the charitable company.

## ORGANISATIONAL STRUCTURE AND DECISION MAKING

The Foundation's Board of Trustees must have a minimum number of three Trustees. The Board of Trustees appoint a Chair of Trustees and Treasurer from amongst themselves. The Trustees are responsible for the strategic direction of the charitable company and oversight of its work and finances.

The Board of Trustees has a Finance, Audit and Risk Subcommittee. This committee is responsible for providing detailed scrutiny of the Foundation's finances, associated procedures and monitoring its risk. This committee is governed by Terms of Reference that were approved by the full Board and reports back to the Board after every meeting.

The Trustees delegate day-to-day responsibility for the provision of services to the Chief Executive Officer. The Chief Executive Officer is responsible for ensuring

the secure financial management and administration of the charity. Effective management and supervision of the staff team is the responsibility of the Chief Executive Officer.

## SUBSIDIARIES

The Foundation has a wholly owned subsidiary, The Jo Cox Foundation Trading Limited (company number 10660951), through which the Foundation channels any trading activities.

## REMUNERATION OF KEY PERSONNEL

The key management personnel of the Foundation consists solely of the Chief Executive Officer. Their remuneration is set by the Board of Trustees, taking into account the charitable company's financial position and the amount paid for this role in comparable organisations.

## RISK ASSESSMENT

The Foundation regularly undertakes a detailed review and assessment of risks, both financial and non-financial, to which it is exposed in its current activities. These have been developed into a formal Risk Management process.

The Trustees have considered a summary of all major risks and have ensured that effective systems and controls exist to reduce internal risks and respond swiftly to external risks and minimise their impact.

Risks are monitored continually by the management team and reviewed regularly by the Trustees unless there are issues that need the Trustees' immediate attention.

The principal risk areas identified by the Trustees are:

- Reputational risk and perception of political bias: to mitigate this we communicate regularly with supporters and beneficiaries and have robust crisis communications procedures.

- Medium-term financial stability: we continue to work to diversify our income streams and secure future funding, in order to further improve the organisation's financial stability.

- Core capacity of the organisation: given the staffing reductions we have undertaken, we will need to monitor the core capacity of the organisation to ensure that a smaller team is able to continue to deliver our work and achieve the impact that we seek.

# REFERENCE AND ADMINISTRATIVE DETAILS

**Charitable Company Name:** The Jo Cox Foundation
**Charity Number:** 1170836
**Company Number:** 10392667 (England and Wales)
**Registered Office:** 2-Work Tileyard North, Cutter Mill, 7 Tileyard North, Wakefield, WF1 5FY

### Chief Executive Officer

Su Moore (until 26 September 2024)
Will Fletcher (Interim Chief Executive Officer, from 27 September 2024)

### Trustees and Directors

The Trustees who served during the year, or until the date that this report and the financial statements were approved, and were also Directors of the company, were as follows:

Amanda Chetwynd-Cowieson
Eloise Todd
Geethika Jayatilaka
Rt Hon Jacqui Smith (resigned 6 July 2024)
Jane Brady (appointed 4 November 2024)
Jennie Richmond
Nisha Jani
Rachel Kinnock (appointed 27 February 2025)
Rosamund Blomfield-Smith
Samantha Vickers
Steve Morris

### Bankers

Metro Bank Plc, 1 Southampton Row, London, WC1B 5HA
Barclays Bank UK Plc, Leicester, LE87 2BB

### Independent Examiner

Kevin Fisher, FCA
Kingston Burrowes Audit Ltd, 308 Ewell Road, Surbiton, Surrey, KT6 7AL

# STATEMENT OF TRUSTEES' AND DIRECTORS' RESPONSIBILITIES

The Trustees, who are also Directors of The Jo Cox Foundation for the purposes of company law, are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The Trustees confirm that they have complied with the duty in Section 17(5) of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Company law requires the Directors to prepare financial statements for each financial year. Under company law the Trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of the affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the Directors are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities Statement of Recommended Practice 2019 (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Directors are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and which enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the

prevention and detection of fraud and other irregularities.

The financial statements have been prepared in accordance with the special provisions for small companies under Part 15 of the Companies Act 2006.

**Signed on behalf of the Trustees:**



**Rosamund Blomfield-Smith, Interim Chair of Trustees**
Date: 2 September 2025

# REPORT OF THE INDEPENDENT EXAMINER

### Independent Examiner's Report to the Trustees of The Jo Cox Foundation

I report to the charitable company Trustees on my examination of the accounts of the company for the year ended 31 December 2024 which are set out on pages 24 to 45.

### Responsibilities and basis of report

As the charitable company's Trustees (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your company's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

### Independent Examiner's statement

Since the company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of The Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or

4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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.



**Kevin Fisher, FCA**

Date: 2 September 2025

For and on behalf of Kingston Burrowes Audit Ltd
308 Ewell Road, Surbiton, Surrey, KT6 7AL

THE JO COX FOUNDATION

# STATEMENT OF FINANCIAL ACTIVITIES

(incorporating Income and Expenditure Account)

FOR THE YEAR ENDED 31 DECEMBER 2024

| | Notes | Unrestricted Funds £ | Restricted Funds £ | 2024 Total £ | 2023 Total £ |
|---|---|---|---|---|---|
| **Income** | | | | | |
| Donations and legacies | 2 | 126,340 | - | 126,340 | 201,972 |
| Charitable activities | 3 | 5,500 | 361,854 | 367,354 | 455,231 |
| Other income | 4 | 41,221 | - | 41,221 | 27,524 |
| **Total** | | 173,061 | 361,854 | 534,915 | 684,727 |
| **Expenditure** | | | | | |
| Raising funds | 5 | 64,166 | - | 64,166 | 80,344 |
| Charitable activities | 6 | 180,723 | 345,855 | 526,578 | 568,570 |
| **Total** | | 244,889 | 345,855 | 590,744 | 648,914 |
| **Net income / (expenditure) for the year** | | (71,828) | 15,999 | (55,829) | 35,813 |
| Transfer between funds | 18 | - | - | - | - |
| **Net movement in funds** | | (71,828) | 15,999 | (55,829) | 35,813 |
| Total funds brought forward | 18 | 174,105 | 124,349 | 298,454 | 262,641 |
| **Total funds carried forward** | 18 | 102,277 | 140,348 | 242,625 | 298,454 |

All income and expenditure derives from continuing activities. The statement of financial activities includes all gains and losses recognised during the year.

The notes on pages 28 to 45 form part of the financial statements.

THE JO COX FOUNDATION

# BALANCE SHEET

AS AT 31 DECEMBER 2024

| | Notes | 2024 £ | 2024 £ | 2023 £ | 2023 £ |
|---|---|---|---|---|---|
| **Fixed Assets** | | | | | |
| Tangible assets | 12 | | 2,058 | | 3,184 |
| Intangible assets | 13 | | 24,273 | | 31,052 |
| Investments | 14 | | 1 | | 1 |
| | | | 26,332 | | 34,237 |
| **Current Assets** | | | | | |
| Debtors | 15 | 10,239 | | 16,883 | |
| Cash at bank and in hand | | 218,178 | | 281,381 | |
| | | 228,417 | | 298,264 | |
| **Liabilities** | | | | | |
| Creditors: Amounts falling due within one year | 16 | 12,124 | | 34,047 | |
| **Net Current Assets** | | | 216,293 | | 264,217 |
| **Net Assets** | 17 | | 242,625 | | 298,454 |
| **Funds** | | | | | |
| Unrestricted | 18 | | 102,277 | | 174,105 |
| Restricted | 18 | | 140,348 | | 124,349 |
| Total funds | 18 | | 242,625 | | 298,454 |

The company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 December 2024.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 December 2024 in accordance with Section 476 of the companies Act 2006.

The Directors acknowledge their responsibilities for:

(a) ensuring that the company keeps accounting records which comply with Sections 386 and 387 of the Companies Act 2006 and

(b) preparing financial statements which give a true and fair view of the state of affairs of the company as at the end of each financial year and of its profit and loss for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the company.

The financial statements have been prepared in accordance with the special provisions for small companies under Part 15 of the Companies Act 2006.

The financial statements were approved and authorised for issue by the Trustees on 2 September 2025 and signed on its behalf by:



Rosamund Blomfield-Smith
Interim Chair of Trustees

The notes on pages 28 to 45 form part of the financial statements.

THE JO COX FOUNDATION

# STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED 31 DECEMBER 2024

| | Notes | 2024 | 2023 |
|---|---|---|---|
| | | £ | £ |
| **Cash flows from operating activities** | | | |
| Net movement in funds per statement of financial activities | | (55,829) | 35,813 |
| Adjustments for: | | | |
| Depreciation charges | 12 | 1,525 | 1,228 |
| Amortisation charged | 13 | 6,779 | 2,842 |
| (Increase) / decrease in debtors | | 6,644 | 12,296 |
| (Decrease) / increase in creditors | | (21,923) | 15,120 |
| ***Net cash provided by / (used in) operating activities*** | | (62,804) | 67,299 |
| **Cash flows from investing activities** | | | |
| Purchase of tangible fixed assets | 12 | (399) | (1,224) |
| Purchase of intangible fixed assets | 13 | - | (33,895) |
| ***Net cash provided by / (used in) investing activities*** | | (399) | (35,119) |
| **Change in cash and cash equivalents in the reporting period** | | (63,203) | 32,180 |
| Cash and cash equivalents at the beginning of the reporting period | | 281,381 | 249,201 |
| **Cash and cash equivalents at the end of the reporting period** | | 218,178 | 281,381 |

The notes on pages 28 to 45 form part of the financial statements.

# NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 DECEMBER 2024

## 1. ACCOUNTING POLICIES

### Basis of preparation and assessment of going concern

The charitable company constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention. The financial statements are presented in sterling which is the functional currency of the charitable company.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

The Trustees consider that there are no material uncertainties about the charitable company's ability to continue as a going concern.

### Income recognition

Items of income are recognised in the financial statements when all of the following criteria are met:

- the charitable company has entitlement to the funds;
- any performance conditions have been met or are fully within the control of the charitable company;
- there is sufficient certainty that receipt of the income is considered probable; and
- the amount can be measured reliably.

## 1. ACCOUNTING POLICIES (cont'd)

### Expenditure recognition

Expenditure is recognised once there is a legal or constructive obligation to make payment to a third party, it is probable that settlement will be required and the amount can be measured reliably.

Expenditure includes those costs of a direct nature which can be allocated to a specific activity. It also includes indirect costs, including governance costs that do not relate to a specific activity but are necessary to support those activities. Support costs are apportioned to each activity on the basis of staff time or on a basis which is designed to reflect the use of the resources.

### Fund accounting

Unrestricted general funds are freely available for use in furtherance of the objects of the charitable company and which have not been designated for particular purposes.

Designated funds are unrestricted funds set aside by the trustees for particular purposes.

Restricted funds are funds which can only be used in accordance with specific restrictions imposed by the donor or which have been raised for a particular purpose.

### Tangible fixed assets

All expenditure on capital items costing less than £100 is written off in the year of purchase.

Depreciation is provided so as to write off the cost of each asset over its estimated useful life at the following annual rate:

| | |
|---|---|
| Computer equipment | 33% on straight line basis |

## 1. ACCOUNTING POLICIES (cont'd)

### Intangible fixed assets

All expenditure on capital items costing less than £1,000 is written off in the year of purchase.

Amortisation is provided so as to write off the cost of each asset over its estimated useful life at the following annual rate:

| | |
|---|---|
| Website and database | 20% on straight line basis |

### Investments in subsidiaries

Investments in group companies are stated at cost less any identified impairment. An impairment review is undertaken annually by the trustees.

### Leases

Operating lease rentals are charged to the Statement of Financial Activities on a straight line basis over the period of the lease.

### Pensions

The charitable company operates a defined contribution pension scheme. Contributions payable under the scheme are charged to the Statement of Financial Activities in the year to which they relate.

### Debtors and creditors

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in the Statement of Financial Activities.

**NOTES TO THE FINANCIAL STATEMENTS**

FOR THE YEAR ENDED 31 DECEMBER 2024 (cont'd)

## 2. DONATIONS AND LEGACIES

| | Unrestricted funds | Total 2024 | Total 2023 |
|---|---|---|---|
| | £ | £ | £ |
| Donations | 121,340 | 121,340 | 123,236 |
| Legacies | 5,000 | 5,000 | 78,736 |
| | 126,340 | 126,340 | 201,972 |

All of the £201,972 recognised in 2023 related to unrestricted funds.

## 3. INCOME FROM CHARITABLE ACTIVITIES

| | Unrestricted funds | Restricted funds | Total 2024 | Total 2023 |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| Stronger Communities: | | | | |
| Yorkshire Programme | - | 83,680 | 83,680 | 40,840 |
| More in Common Programme | - | 173,071 | 173,071 | 154,533 |
| Great Get Together | - | - | - | 83,577 |
| Connection Coalition | - | - | - | 89,650 |
| Loneliness Policy Group | - | 76,245 | 76,245 | |
| Respectful Politics | 5,000 | 28,858 | 33,858 | 24,202 |
| Core charitable activities | 500 | - | 500 | 62,429 |
| Grants and other income | 5,500 | 361,854 | 367,354 | 455,231 |

All of the £455,231 recognised in 2023 related to restricted funds.

## 4. OTHER INCOME

| | Unrestricted funds £ | Restricted funds £ | Total 2024 £ | Total 2023 £ |
|---|---|---|---|---|
| Jo Cox Way kit and subsistence | 1,848 | - | 1,848 | 3,091 |
| Jo Cox Way entry fees | 38,993 | - | 38,993 | 18,497 |
| Other income | 380 | - | 380 | 5,936 |
| | 41,221 | - | 41,221 | 27,524 |

All of the £27,524 recognised in 2023 related to unrestricted funds.

## 5. COST OF RAISING FUNDS

| | Direct costs £ | Support costs £ | Total 2024 £ | Total 2023 £ |
|---|---|---|---|---|
| Fundraising events and materials | 36,961 | - | 36,961 | 33,882 |
| Staff costs | 14,836 | 10,548 | 25,384 | 45,932 |
| Recruitment and training | 199 | - | 199 | 114 |
| IT costs | - | 797 | 797 | 382 |
| Stationery and postage | - | 106 | 106 | 34 |
| Membership and subscriptions | - | 710 | 710 | - |
| Travel and subsistence - staff | 9 | - | 9 | - |
| | 52,005 | 12,161 | 64,166 | 80,344 |

All of the £80,344 expenditure recognised in 2023 was charged to unrestricted funds.

## 6. EXPENDITURE ON CHARITABLE ACTIVITIES

| | Direct costs £ (note 7) | Support costs £ (note 8) | Total 2024 £ | Total 2023 £ |
|---|---|---|---|---|
| Stronger Communities: | | | | |
| Yorkshire Programme | 67,109 | 9,349 | 76,458 | 88,899 |
| More in Common Programme | 110,031 | 8,902 | 118,933 | 100,072 |
| Great Get Together | 70,975 | 5,961 | 76,936 | 112,057 |
| Connection Coalition | 34,889 | 3,037 | 37,926 | 75,778 |
| Communities (general) | 30,548 | 2,598 | 33,146 | - |
| Respectful Politics | 50,804 | 4,376 | 55,180 | 50,541 |
| Fairer World | - | - | - | 12,405 |
| Core charitable activities | 84,461 | 43,538 | 127,999 | 128,818 |
| | 448,817 | 77,761 | 526,578 | 568,570 |

Of the £568,570 expenditure recognised in 2023, £96,825 was charged to unrestricted funds and £471,745 was charged to restricted funds.

## 7. ANALYSIS OF DIRECT COSTS

| | Total 2024 £ | Total 2023 £ |
|---|---|---|
| Staff salaries | 366,734 | 390,769 |
| Miscellaneous HR costs | 2,131 | 1,190 |
| Recruitment and training | 1,707 | 3,206 |
| Travel and subsistence: | | |
| - staff | 18,324 | 13,117 |
| - trustees | 288 | - |
| - volunteers | 4 | - |
| Marketing and advertising | 11,641 | 26,123 |
| Websites and database | 21,935 | 28,193 |
| Project costs | 26,053 | 21,704 |
| Monitoring and Evaluation | - | 6,530 |
| | 448,817 | 490,832 |

## 8. ANALYSIS OF SUPPORT COSTS

| | Total 2024 £ | Total 2023 £ |
|---|---|---|
| Staff salaries | 42,192 | 46,613 |
| Payroll costs | 2,324 | 3,080 |
| IT costs | 10,463 | 4,639 |
| Bank charges | 76 | 515 |
| Premises and related costs | 4,759 | 11,500 |
| Insurance | 1,864 | 158 |
| Depreciation | 1,525 | 1,228 |
| Amortisation | 6,779 | 2,842 |
| Governance costs (see note 9) | 3,189 | 2,119 |
| Stationery and postage | 2,304 | 2,611 |
| Telephone and internet | 800 | 883 |
| Subscriptions | 1,486 | 1,550 |
| | 77,761 | 77,738 |

## 9. GOVERNANCE COSTS

| | 2024 £ | 2023 £ |
|---|---|---|
| Independent Examination fees | 2,303 | 1,878 |
| Board costs | 886 | 241 |
| | 3,189 | 2,119 |

## 10. STAFF COSTS

| | 2024 | 2023 |
|---|---|---|
| | £ | £ |
| Wages and salaries | 383,784 | 437,496 |
| Social security costs | 32,064 | 36,456 |
| Pension costs | 8,279 | 9,362 |
| Redundancy payments | 10,183 | |
| | 434,310 | 483,314 |

During the year, the charitable company made redundancy payments following a restructuring of operations. These payments were made under the terms of an approved formal plan and represent a restructuring cost. The charitable company's accounting policy is to recognise such costs as an expense in the Statement of Financial Activities and a liability on the balance sheet when the redundancy occurs. All payments were funded from general operating funds at the time of payment.

The redundancy payments were for four employees who were made redundant due to a discontinuation of roles as part of a strategic reorganisation of the charitable company's operations. The payments were made in accordance with statutory requirements and included a contractual notice period and a redundancy period based on length of service.

The average number of employees during the year was as follows:

| Particulars of employees: | 2024 | 2023 |
|---|---|---|
| | No. | No. |
| Chief Executive | 1 | 1 |
| Administrative staff | 4 | 4.5 |
| Charitable activities | 10 | 10.5 |
| | 15 | 16 |

## 10. STAFF COSTS (cont'd)

Total employee benefits received by key management, including employer's pension costs, amounted to £74,490 (2023: £76,676).

Under FRS 102, employee benefits include gross salary, benefits in kind, employer's national insurance and employer's pension costs.

No employees received total employee benefits (excluding employer's national insurance and employer pension costs) of £60,000 or more during the financial year 2024 (2023: 1 employee received total benefits between £60,000 and £70,000).

## 11. TRUSTEE REMUNERATION & RELATED PARTY TRANSACTIONS

No trustee received any remuneration during the year and previous year.

Two trustees (2023: None) were reimbursed for their travel and subsistence during the year totalling £288 (2023 : £Nil).

No trustee or other person related to the charitable company had any personal interest in any contract or transaction entered into by the charitable company during the year (2023: Nil).

The charitable company did not receive any donations from related parties that require disclosure (2023: Nil). The aggregate amount of all donations received from related parties was £130 (2023: £100).

## 12. TANGIBLE FIXED ASSETS

| | Computer Equipment | Total |
|---|---|---|
| | £ | £ |
| **Cost** | | |
| At 1 January 2024 | 5,155 | 5,155 |
| Additions | 399 | 399 |
| Disposals | - | - |
| At 31 December 2024 | 5,554 | 5,554 |
| **Depreciation** | | |
| At 1 January 2024 | 1,971 | 1,971 |
| Charged in the year | 1,525 | 1,525 |
| Eliminated on disposals | - | - |
| At 31 December 2024 | 3,496 | 3,496 |
| **Net book value** | | |
| 31 December 2024 | 2,058 | 2,058 |
| 31 December 2023 | 3,184 | 3,184 |

## 13. INTANGIBLE FIXED ASSETS

| | Website & Database | Total |
|---|---|---|
| | £ | £ |
| **Cost** | | |
| At 1 January 2024 | 33,895 | 33,895 |
| Additions | - | - |
| Disposals | - | - |
| At 31 December 2024 | 33,895 | 33,895 |
| **Amortisation** | | |
| At 1 January 2024 | 2,843 | 2,843 |
| Charged in the year | 6,779 | 6,779 |
| Eliminated on disposals | - | - |
| At 31 December 2024 | 9,622 | 9,622 |
| **Net book value** | | |
| 31 December 2024 | 24,273 | 24,273 |
| 31 December 2023 | 31,052 | 31,052 |

## 14. FIXED ASSET INVESTMENTS

| | 2024 | 2023 |
|---|---|---|
| | £ | £ |
| Shares in group undertakings | 1 | 1 |
| | 1 | 1 |

## 15. DEBTORS

| | 2024 | 2023 |
|---|---|---|
| | £ | £ |
| Prepayments and Accrued income | 10,189 | 16,277 |
| Other debtors | 50 | 606 |
| | 10,239 | 16,883 |

## 16. CREDITORS

| Amounts falling due within one year | 2024 | 2023 |
|---|---|---|
| | £ | £ |
| Trade Creditors | 1,406 | 3,976 |
| Amounts owed to group undertakings | 277 | 2,398 |
| Accruals | 6,689 | 16,400 |
| Taxation and Social Security | 3,000 | 9,321 |
| Pensions | 752 | 1,952 |
| | 12,124 | 34,047 |

## 17. ANALYSIS OF NET ASSETS BETWEEN FUNDS

| 2024 | Unrestricted Funds £ | Designated Funds £ | Restricted Funds £ | Total Funds £ |
|---|---|---|---|---|
| Fixed assets | - | 26,332 | - | 26,332 |
| Current assets | 88,069 | - | 140,348 | 228,417 |
| Current liabilities | (12,124) | - | - | (12,124) |
| Net assets at 31 December 2024 | 75,945 | 26,332 | 140,348 | 242,625 |

Comparative information for the previous financial year is as follows:

| 2023 | Unrestricted Funds £ | Designated Funds £ | Restricted Funds £ | Total Funds £ |
|---|---|---|---|---|
| Fixed assets | - | 34,237 | - | 34,237 |
| Current assets | 173,915 | - | 124,349 | 298,264 |
| Current liabilities | (34,047) | - | - | (34,047) |
| Net assets at 31 December 2023 | 139,868 | 34,237 | 124,349 | 298,454 |

**NOTES TO THE FINANCIAL STATEMENTS**

FOR THE YEAR ENDED 31 DECEMBER 2024 (cont'd)

## 18. MOVEMENT IN FUNDS

| | At 1 January 2024 | Income | Expenditure | Transfers | At 31 December 2024 |
|---|---|---|---|---|---|
| **2024** | | | | | |
| **Restricted funds:** | £ | £ | £ | £ | £ |
| Batley and Spen | 8,400 | 8,000 | (13,000) | - | 3,400 |
| Astra Connection Coalition | 58,437 | - | (58,437) | - | - |
| Joseph Rowntree Reform Trust | 3,051 | 28,358 | (31,409) | - | - |
| Lottery: Bringing People Together | 54,461 | 173,071 | (200,899) | - | 26,633 |
| Lottery: Reaching Communities | - | 75,680 | (41,610) | - | 34,070 |
| Misc: Civility Commission | - | 500 | (500) | - | - |
| Astra: Loneliness Policy Group | - | 76,245 | - | - | 76,245 |
| **Total restricted funds** | 124,349 | 361,854 | (345,855) | - | 140,348 |
| **Unrestricted funds:** | | | | | |
| General funds | 139,868 | 173,061 | (236,585) | (399) | 75,945 |
| Fixed assets | 34,237 | - | (8,304) | 399 | 26,332 |
| **Total unrestricted funds** | 174,105 | 173,061 | (244,889) | - | 102,277 |
| **Total funds** | 298,454 | 534,915 | (590,744) | - | 242,625 |

## 18. MOVEMENT IN FUNDS (cont'd)

Comparative information for the previous financial year is as follows:

| 2023 | At 1 January 2023 | Income | Expenditure | Transfers | At 31 December 2023 |
|---|---|---|---|---|---|
| **Restricted funds:** | £ | £ | £ | £ | £ |
| Batley and Spen | 5,000 | 16,100 | (12,700) | - | 8,400 |
| Esmee Fairbairn | 6,345 | 4,000 | (10,345) | - | - |
| Spirit of 2012 | 28,480 | 197,428 | (225,908) | - | - |
| Astra Connection Coalition | 100,968 | 89,650 | (132,181) | - | 58,437 |
| Joseph Rowntree Reform Trust | - | 24,202 | (21,151) | - | 3,051 |
| Lottery: Bringing People Together | - | 99,103 | (44,642) | - | 54,461 |
| Leeds City Council | - | 24,748 | (24,818) | 70 | 0 |
| **Total restricted funds** | 140,793 | 455,231 | (471,745) | 70 | 124,349 |
| **Unrestricted funds:** | | | | | |
| General funds | 121,848 | 229,496 | (173,099) | (38,377) | 139,868 |
| Fixed assets | - | - | (4,070) | 38,307 | 34,237 |
| **Total unrestricted funds** | 121,848 | 229,496 | (177,169) | (70) | 174,105 |
| **Total funds** | 262,641 | 684,727 | (648,914) | - | 298,454 |

## 18. MOVEMENT IN FUNDS (cont'd)

**Purpose of restricted funds**

Restricted funds are money earmarked for activities stipulated by the funder and used for the objectives set by them. These funds are detailed here:

| | |
|---|---|
| Batley and Spen | Community projects delivered in Batley and Spen |
| Esmee Fairbairn | More in Common network (groups and partnerships undertaking social cohesion work in their local area) |
| Spirit of 2012 | Moment to Movement project |
| Astra: Connection Coalition | Connection Coalition (network of organisations delivering work to address loneliness) |
| Joseph Rowntree Reform Trust | Jo Cox Civility Commission (addressing abuse and intimidation of elected representatives) |
| Lottery: Bringing People Together | More in Common network (groups and partnerships undertaking social cohesion work in their local area) |
| Lottery: Reaching Communities | Bridging & Belonging project in North Kirklees |
| Misc: Civility Commission | Jo Cox Civility Commission (addressing abuse and intimidation of elected representatives) |
| Astra: Loneliness Policy Group | Convening voluntary sector organisations to develop policy recommendations for addressing loneliness |
| Leeds City Council | Great Get Together/Migration Yorkshire collaboration |

**Designated funds**

The Trustees decided that the net book value of the fixed assets should be designated as it does not form part of the free reserves of the charitable company.

These assets are used to support charitable activities and are depreciated (tangible fixed assets) or amortised (intangible fixed assets) in accordance with the relevant accounting policies as laid out in note one on pages 28 - 30.

## 19. COMMITMENTS UNDER OPERATING LEASES

The total future minimum lease payments due under non-cancellable operating leases are as follows:

| | 2024 Land and Buildings £ | 2023 Land and Buildings £ |
|---|---|---|
| Within one year | 180 | 364 |
| Within one to five years | - | - |
| | 180 | 364 |

## 20. COMPANY STATUS

The Jo Cox Foundation is a private company limited by guarantee and has no share capital. It is incorporated in Great Britain and registered in England and Wales. Each member is liable to contribute a sum not exceeding £1 in the event of the Company being wound up. The address of the registered office can be found in the Reference and Administration details on page 19.

## 21. TAXATION

The charitable company is exempt from corporation tax on its charitable activities.

## 22. CONTINGENT ASSETS

The amount of funding awarded to the charitable company but not recognised at 31 December 2024 was £422,450 (2023: £399,409).

**THE JO COX FOUNDATION**

England & Wales - Charity number 1170836

# Accounts

THE JO COX FOUNDATION

# TRUSTEES' REPORT AND ACCOUNTS 2023








THE JO COX FOUNDATION

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# INTERIM CHAIR

## ROSAMUND BLOMFIELD-SMITH



2023 was the most important year to date for our Respectful Politics work, as we placed the worsening issue of abuse and intimidation of elected politicians fully in the spotlight with the launch of the Jo Cox Civility Commission.

The Commission took Jo as its starting point, focusing not on the way that she died, but on her passion for achieving a gender balanced parliament. We know that abuse and intimidation disproportionately impacts female politicians, as it does those from a minority ethnic background or who are disabled, and we won't see long-lasting change in representation without tackling the issue of abuse.

The enthusiastic response we had from individuals and organisations wanting to collaborate with us and contribute to the Commission shows the importance of the work. Suggesting concrete ways of bringing about change was essential, moving away from a mindset that nothing can be improved.

We were delighted to launch our 28 recommendations to the public in early 2024. But the work does not end here, and raising awareness, and pushing for the recommendations to be adopted, are key priorities for 2024.

We are also pleased to have delivered so much work in our Stronger Communities strand, as always guided by Jo's words that "we have more in common than that which divides us". In recognition of the increased work around Respectful Politics, we have paused our Fairer World strand, and will revisit how we best honour Jo's international legacy in 2024.

I'd like to say a particular thank you to our funders and partners - without you none of our work would be possible. Thank you also to the dedicated staff of the Foundation who carry out its work with unfailing commitment and passion.

The whole board sends its heartfelt thanks to Jacqui Smith, who recently resigned as Chair to take up a ministerial post. For five years she chaired the Foundation with great distinction and led it with enormous drive and compassion.

# CHIEF EXECUTIVE

## SU MOORE



2023 has been the first year of our new three year strategic cycle. With a sharper focus on what it means to us to be a legacy charity, and with a clear view of the change we want to make in the world, we've had a year of real progress on issues that Jo was passionate about.

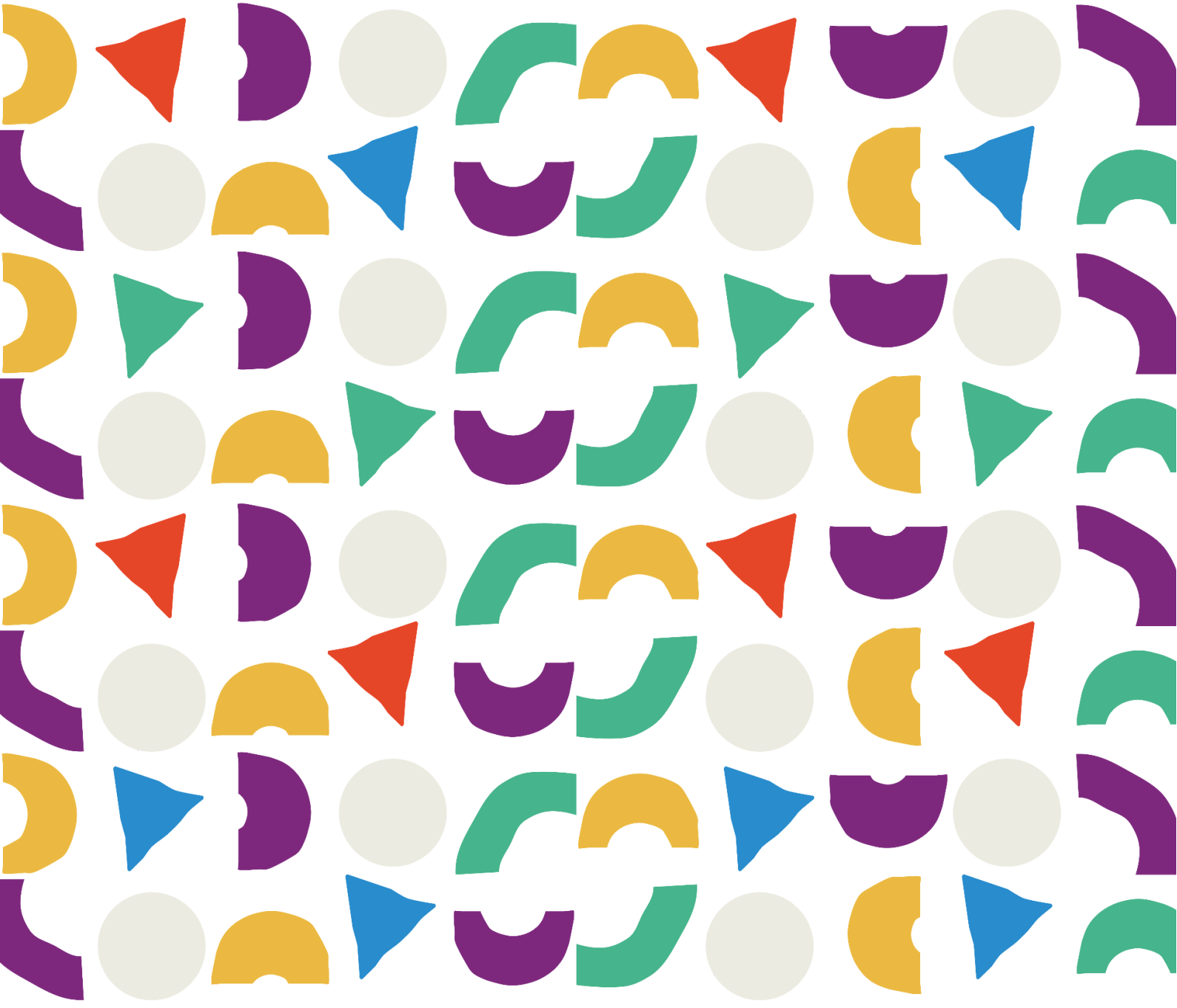
In our Stronger Communities work, we have honed and refined our More in Common Partnerships model, understanding how Jo's words that "we have more in common than that which divides us" can bring together organisations in cities and regions to work more effectively and support their communities. Our first Partnership, in Cardiff, demonstrated the power of this work, as they held 35 Great Get Together events in June. We have been delighted to secure a grant from the National Lottery Community Fund which will enable us to champion this work for the next three years, with the aim of establishing 15 Partnerships around the UK by 2026.

We've also been able to make often difficult decisions based on our strategic priorities. This has included the decision to close the Connection Coalition in 2024. Started at the beginning of the pandemic, with the aim of preventing a crisis of disconnection by supporting those working to address loneliness, the Coalition now has 1,000 members. We have decided that now is the time to close this crisis response project, and we'll be focused in the early months of 2024 on a good end for the project. Before the closure, though, we've continued to amplify the voices of the members, raising awareness with the government of the issues impacting them, including the cost of living crisis.

You have already read about the progress on the Jo Cox Civility Commission. I have worked closely on the Commission call to action, and being able to recommend positive ways of addressing the issue of abuse and intimidation of elected politicians is such an important step to making change. One of our strategic aims is to be the leading voice in the UK on this issue, and the research and work we have done this year ensures we truly are experts, and we look forward to raising awareness, and bringing about change in 2024.

THE JO COX FOUNDATION

We couldn't have achieved anything that you will read about in this report without the brilliant and dedicated staff of the Foundation, and I want to say a huge thank you to them for their hard work. Thanks also to our funders who enable us to keep making change on issues that Jo cared about.



# ABOUT THE JO COX FOUNDATION




**Jo Cox was a passionate campaigner, activist and humanitarian; a proud Yorkshire lass and internationalist; and a devoted mum, daughter, sister, wife, friend and MP.**

The Jo Cox Foundation makes meaningful change on issues that Jo was passionate about. Like Jo, we believe that a kinder, fairer and more connected world is possible. Underpinning this belief is the understanding that we have more in common than that which divides us. As we work to make change, we follow Jo's example of collaborating with others and bringing people together to achieve more than we can alone.

We work in three areas. We nurture stronger communities, champion civility in politics and advocate for a fairer world.

We focus on making change led by the values by which Jo lived her life and are guided by the following principles:

**Ambitious**
**This means:** We believe, like Jo, that there should be no 'too difficult to deal with' pile

**Collaborative**
**This means:** We believe that achieving real change requires us all to pool our strengths and exchange our skills and resources

**Empathetic**
**This means:** We believe that kindness and compassion are signs of strength, and that it is only by understanding others that we can build relationships and bridge divides

THE JO COX FOUNDATION

# STRONGER COMMUNITIES



**We want less lonely, better connected communities across the UK, where everyone feels that they belong.**

Our Stronger Communities work spans:

- The Great Get Together and Great Winter Get Together campaigns, aimed at bringing communities together, united by Jo's words that 'we have more in common than that which divides us'
- The More in Common network of volunteer-led groups around the UK, committed to bridging divides in their communities
- Our work in West Yorkshire, centred in Batley and Spen, Jo's constituency
- The Connection Coalition, bringing together 1000 members who work on issues related to loneliness and social connection

The following is a summary of our achievements over the last 12 months

## WE BROUGHT COMMUNITIES TOGETHER

In June, the Great Get Together once again demonstrated the desire of communities around the UK to come together to celebrate what unites us, and reject division. Over 650 events took place, with 97% of attendees saying that taking part positively impacted their wellbeing.

"There are very different types of people - age, background, wealth, culture, education, occupation across the housing block and an ever-increasing transient community. **Arranging a get together offers us an opportunity to meet and understand each other better**."



THE JO COX FOUNDATION

In 2022 we began a pilot of a new way of bringing communities together - the More in Common partnership. While More in Common groups are made up of individuals, partnerships bring organisations from an area together (which could include local councils, police, charities, youth groups) and tend to cover larger geographical areas.

With successful partnerships established in Cardiff and Nottingham, we have secured funding this year to further develop this model, and increase the number of partnerships around the country.



## DEEP DIVE: CARDIFF MORE IN COMMON PARTNERSHIP

Made up of around 50 organisations – including Cardiff Council, South Wales Police, charities, and community organisations – the Partnership was established as an effort to collaboratively address issues in localities across Cardiff through the Great Get Together and other creative projects. The Partnership is developing and now set to support the delivery of the Welsh Government Community Cohesion Programme.

For the 2023 Great Get Together, 35 events took place across Cardiff. Hannah Garcia represents Green Squirrel, one of several groups that facilitated Great Get Together events in the Splott, Adamsdown, and Tremorfa areas of Cardiff. She said:

"To see so much joy and connection on the day, with a mixture of new and familiar faces, was wonderful, and it built our confidence to know that future events like this can be successful. **It built stronger links between us and other local organisations**, especially Oasis and NoFit State. This not only brings new people into the Gardens but also, we feel, **builds local resilience as our organisations increasingly understand how we can work together, support each other, and raise each other up**.



THE JO COX FOUNDATION

# WE BROUGHT ORGANISATIONS TOGETHER

Founded at the start of the pandemic, the Connection Coalition has continued to provide unique value to its members. However, as the pandemic recedes further into the past, we have made the decision to close this Covid response project in 2024, and are committed to learning from, and sharing knowledge, about the project.

In 2023, though, we have focused on continuing to offer the support that members value so much. A central part of our offer is our informal get togethers, monthly events where members are encouraged to come together, share, and support each other. We know that these help attendees in their work. 86% of attendees said they felt motivated afterwards, an increase from 69% at the start.



We also ran a community of practice. Over six sessions, 12 members came together with the aim of being supported to build their capacity to navigate uncertainty and keep supporting people in their communities at risk of loneliness and disconnection.

"**I am feeling hugely grateful.** Over the last 3 months I have been part of The Jo Cox Foundation Community Coalition [community of practice] and it has been a remarkable experience. It has involved coming together virtually with an amazing group of like-minded people to explore issues pertinent to our work (loneliness, social care, homelessness) in doing so gaining shared learning and support.

But it has also been a shared space for truly inspiring people to gain support with refocusing on how we perceive the world and the wicked problems we are trying to address. At a time when so many in my sector are suffering with compassion fatigue, unprecedented demands and ever growing financial pressures, **this safe space with compassionate and caring peers has been a true sanctuary**."

THE JO COX FOUNDATION

# WE WORKED IN PARTNERSHIP

In collaboration with Migration Yorkshire, we used our existing networks across Yorkshire and expertise in running community events that bring people together, to support migrant and refugee groups, primarily but not exclusively Hongkongers, to run or participate in local Great Get Together events in the run up to the Yorkshire Integration Festival in September. 15 events were delivered to over 1000 participants, with events including:

- A tea party with drawing and handcrafting, connecting families with children up to 18 years old in Wakefield and providing mutual support to adjust to their new life in UK

- A celebration of Congolese, Burundian, Rwandese, Ugandese, Kenyan and Tanzanian cultures through dance and song. Traditional dance performed by members of the East African community who have made Sheffield their home

- A series of three community badminton sessions aimed at bringing together 1990s Hong Kongers in Leeds including casual games and opportunities to chat
-

"This is my first time doing something like this. We have never brought everyone together. People usually do their own small activities. **Taking part in this project has taught me so much**."



# RESPECTFUL POLITICS

**We want anyone, regardless of their background, to feel able to participate in our political discourse and be treated with respect. In particular, we seek to end the abuse and intimidation that discourages so many from entering political life, and especially impacts diverse representation.**




2023 has been a transformational year for our Respectful Politics work, with the launch of the Jo Cox Civility Commission. Chaired by Baroness Bertin and Lord Coaker, the Commission set out to find implementable solutions to the worsening issue of abuse and intimidation of elected politicians. Our starting point for this work is Jo. Jo was passionate about empowering other women into politics. We know that the problem of abuse disproportionately impacts women, and those from minority ethnic backgrounds, which is why we're so determined to bring about change.



In 2023 we carried out vital stakeholder research to fully inform our recommendations for this area of work, which we announced in a call to action in early 2024. Following the launch of the Commission in February 2023, we:

- Received almost 100 submissions to our open call, spanning serving and former politicians, government officials, policy professionals and other experts in the field.
- Held interviews and discussions with expert bodies, including the Electoral Commission, the Local Government Association and the National Association of Local Councillors.
- Had conversations with security and justice departments and organisations, including the National Police Chiefs Council, the Parliamentary Security team, officials from Operation Bridger, and the City of London Police.

- Conducted interviews and roundtable discussions with experts on representative democracy, including Elect Her, the Centenary Action Group, the Board of Deputies, and the Disability Policy Centre.
- Interviewed current and former politicians in Westminster and devolved administrations, and current and former local councillors.

Based on what we heard in these conversations, we formulated 28 recommendations designed to make change in the long and short term. The recommendations sit across eight categories: coordination and behaviour, political literacy, social media, police and security, parliaments (Westminster and devolved administrations), local government, elections, and political parties.

Having identified implementable solutions to the issue, we are now focussing on pushing for action on the recommendations that we launched in early 2024, and on making meaningful change on this issue.

**Theresa May, Prime Minister (2016 - 2019):** Jo Cox was a passionate advocate for inspiring women to enter politics and it is a fitting tribute to her memory for us to take action on abuse and intimidation, which otherwise deters people from putting themselves forward and standing for election. I was first elected in 1997 and since then we have witnessed the changing face of abuse and intimidation faced by elected representatives, both in the UK and in democracies worldwide. In 2018, the Jo Cox Loneliness Commission provided a roadmap for us to make great strides on that important issue and I believe the Jo Cox Civility Commission will do the same.

**Gordon Brown, Prime Minister (2007 - 2010):** In the immediate aftermath of Jo's murder in 2016, I wrote about the downward spiral we were witnessing in our political culture and about the hope many of us had for Jo's legacy to be a turning point. With the recommendations of the Jo Cox Civility Commission, we now have the chance to turn words into action on this issue and bring about the changes to our political culture that are well overdue.

# HOW WE WORK

**The way that we work is as important to us as what we do. We lead by example and stay true to the values by which Jo lived her life in all of our day-to-day operations. We think about this work in three categories.**



## PEOPLE

A diverse and inclusive workforce is central to achieving our goals. We continue to prioritise centering a culture of belonging, and focusing on staff wellbeing. In 2023, we have:

- Maintained an excellent set of results from our staff survey, with all staff saying they are proud to work for the Foundation, and that their wellbeing is actively supported.
- Continued to update and evolve our diversity, equity and inclusion (DEI) strategy. This has included further defining what we mean by DEI, continuing to review and improve our recruitment processes and committing to publicly sharing what we are learning.



## COMMUNICATING OUR WORK

We understand that for a small charity we have a loud voice! We continue to use this to make change on issues Jo cared about.

- In 2023 we have focused on increasing awareness and accessibility of the work of the Foundation. A key element of this has been a full brand refresh and website redevelopment, helping our communities better understand the work that we do.
- We have continued to prioritise amplifying the voices of our communities, and working to influence decision makers. This has included our work to highlight the impact of the cost of living crisis on small charities. A survey in the spring showed that over 80% of our Connection Coalition members were concerned about their on-going sustainability. We shared this shocking statistic with the Minister for Civil Society and DCMS civil servants,

which helped inform the government's £76m Community Organisations Cost of Living Fund.

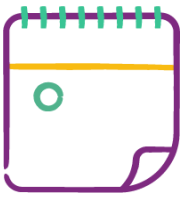


## OPERATIONS

Operations - including governance, finance and fundraising - is central to how the Foundation functions. These internal (and essential) elements are as integrally linked to our values as the rest of our work.

- We continue to prioritise the financial sustainability of the organisation, looking to diversify our income streams and seek new sources of funding. Fundraising activities have focussed on two key areas:
    - Individual giving and challenge events. The Jo Cox Way continues to be a successful fundraiser. The expenditure on this activity is covered by entry fees from participants. We have also used time from our comms team to support our individual giving campaigns
    - Grant fundraising. As our Spirit of 2012 grant has come to an end, we have focussed on securing new grants for our community work, with staff time invested in this activity. We are delighted to have secured a National Lottery grant from their Bringing People Together fund for our More in Common programme, as well as submitting substantial applications for other areas of our work where we expect to receive the outcomes of these applications in 2024.
- As part of our commitment to reducing our impact on the environment, we have carried out our first benchmarking exercise for greenhouse gas emissions. We have measured this at 13.260 tCO2e in 2023. Moving into 2024 we will be developing our first carbon reduction plan and putting in place new monitoring measures to ensure that we continue to measure our emissions and take a data-driven approach to considering how we can reduce our carbon footprint.

THE JO COX FOUNDATION



# PRIORITIES FOR 2024

In 2024 we continue to make positive change on issues that Jo was passionate about. We are placing particular focus on:

- Launching the **Jo Cox Civility Commission** call to action, and campaigning for the adoption of our recommendations.
- Continuing our work to be the **leading voice on the issue of abuse and intimidation** in politics, raising awareness of the issue, and the impact on democracy.
- Pushing for all parties to engage with our **Civility Pledge** during the General Election, with the aim of pushing for a more respectful tone in campaigning.
- Deeping the **impact of our work in Yorkshire** through our Bridging and Belonging project, focusing on community listening to truly understand the needs and concerns of our local communities.
- **Closing the Connection Coalition** well, supporting members through the final six months, and focusing on gathering and sharing learning from the project.
- **Advocating for ongoing government action** on the issue of loneliness.
- Expanding the **More in Common Partnership model**, learning from our existing Partnerships, and building new relationships in other geographic areas.
- Exploring how our deep knowledge of countering abuse and intimidation in political life could have an **international influence**.

# SUPPORTERS

We would like to thank everyone who supported our work in 2023, particularly our dedicated and hard-working staff team. Without them, we couldn't achieve any of our work on issues that Jo was passionate about.

## FUNDERS AND PARTNERS

### Charitable trusts and foundations

- The Astra Foundation
- The Batley & Birstall Community Fund
- Esmée Fairbairn
- Joseph Rowntree Reform Trust
- National Lottery Community Fund - Bringing People Together
- The Newby Trust
- The Sir George Martin Charitable Trust
- The Souter Charitable Trust
- Spirit of 2012

### Corporates and other organisations

- Clearsilver Brand Marketing
- Community Union
- Menzies Distribution
- Neue Schule
- Paisley Properties
- SAH Associates
- Sovereign Healthcare
- WA Communications
- Wedgewood Britain Limited

## Government and public sector

- Leeds City Council
- NHS Shared Business Services - Wakefield

## Community events

Our thanks to everyone who participated in our two main community events in 2023: the Jo Cox Way and the Royal Parks Half Marathon. We'd also like to thank all of those who undertook to use their Great Get Together as a way to fundraise for us, and all of those who undertook their own fundraising for the Foundation.

## Individual donors

We continue to receive support from many individuals, including those who choose to make regular donations to us as Friends of the Jo Cox Foundation. We would like to thank all of those who donated to us in 2023.

# FINANCIAL REVIEW

### Funds raised

Total income for the year was £684,727 (2022: £629,515); of which unrestricted income was £229,496 (2022: £196,519) and restricted income was £455,231 (2022: £432,996).

### Expenditure

Total expenditure was £648,914, (2022: £591,489); of which unrestricted expenditure was £177,169 (2022: £162,565) and restricted expenditure was £471,745 (2022: £428,924).

This resulted in a surplus for the year of £35,813 (2022: £38,026).

## RESERVES POLICY

JCF's reserves policy has been devised by analysing the charity's main financial obligations now, and in the future, the cost of reshaping the charity and the scale of risk to voluntary income to calculate a target sum of unrestricted funds to be held in reserve. Such a sum should be sufficient to ensure the continued operation of the charity in the medium term in the event of a drop in generated income.

The level of free reserves is continually monitored. It is monitored monthly by management as part of their review of the management accounts, and is reported to all meetings of both the Finance, Audit and Risk Committee and the full Board, so that Trustees can monitor and manage reserves effectively.

The target level of free reserves has been set as between four and six months' expenditure based on the approved budget for the following 12 months.

The target for 31 December 2023 was set at a range of £237,538 to £356,307 in free reserves. At 31 December 2023, JCF held £139,868 in free reserves (2022: £121,848).

# STRUCTURE, GOVERNANCE AND MANAGEMENT

## GOVERNING DOCUMENT

The Jo Cox Foundation is a charitable company, limited by guarantee, incorporated on 23 September 2016, and registered as a charity on 19 December 2016.

The company was established under a Memorandum and Articles of Association, which established the objects and powers of the charitable company, as amended by special resolution on 16 January 2018.

## GOVERNANCE

The charity is governed by its Trustees. The Trustees also act as the members of the charity and its corporate Directors for the purposes of the Companies Act 2006. The Articles of Association outline the powers, responsibilities and decision-making processes of the Trustees.

## RECRUITMENT AND APPOINTMENT OF TRUSTEES

The process for appointing Trustees to the Board of The Jo Cox Foundation is outlined in the Articles of Association, which specifies that any person who is willing to act as a Trustee and who would not be disqualified from acting may be appointed by a decision of the Trustees.

There is no requirement for how Trustees should be recruited, and this will normally be considered on a case-by-case basis as vacancies arise. It includes a combination of open recruitment and direct approaches to suitable candidates.

## TRUSTEE INDUCTION AND TRAINING

Trustees are provided with a clear role description, outlining their statutory and additional responsibilities. New Trustees are provided with a thorough induction, including spending time with the CEO and Head of Ops and Finance. All Trustees are encouraged to take up relevant training and development to fulfil their role and responsibilities to the charity.

## ORGANISATIONAL STRUCTURE AND DECISION MAKING

The Foundation's Board of Trustees must have a minimum number of three Trustees. The Board of Trustees appoint a Chair of Trustees and Treasurer from amongst themselves. The Trustees are responsible for the strategic direction of the charity and oversight of its work and finances.

The Board of Trustees has a Finance, Audit and Risk Subcommittee. This committee is responsible for providing detailed scrutiny of the Foundation's finances, associated procedures and monitoring its risk. This committee is governed by Terms of Reference that were approved by the full Board and reports back to the Board after every meeting.

The Trustees delegate day-to-day responsibility for the provision of services to the Chief Executive Officer. The Chief Executive Officer is responsible for ensuring the secure financial management and administration of the charity. Effective management and supervision of the staff team is the responsibility of the Chief Executive Officer.

## SUBSIDIARIES

The Foundation has a wholly owned subsidiary, The Jo Cox Foundation Trading Limited (company number 10660951), through which the Foundation channels any trading activities.

## REMUNERATION OF KEY PERSONNEL

The key management personnel of the Foundation consists solely of the Chief Executive Officer. Her remuneration is set by the Board of Trustees, taking into account the charity's financial position and the amount paid for this role in comparable organisations.

## RISK ASSESSMENT

The Foundation regularly undertakes a detailed review and assessment of risks, both financial and non-financial, to which it is exposed in its current activities. These have been developed into a formal Risk Management process.

The Trustees have considered a summary of all major risks and have ensured that effective systems and controls exist to reduce internal risks and respond swiftly to external risks and minimise their impact.

Risks are monitored continually by the management team and reviewed regularly by the Trustees unless there are issues that need the Trustees' immediate attention.

The principal risk areas identified by the Trustees are:

- Reputational risk and perception of political bias: to mitigate this we communicate regularly with supporters and beneficiaries and have robust crisis communications procedures.

- Digital security incident: we have considered the likelihood of this risk to have increased and will take steps to review our safeguards.

- Long-term income: we continue to work to diversify our income streams and secure future funding, with a particular focus on the period from mid 2024 onwards.

- Wellbeing of staff impacted by the sensitive nature of our work: this is a key risk for the organisation, especially as we launch the Civility Commission and engage with the abuse and intimidation received by elected officials.

- Financial error, oversight or fraud: in 2022 we adopted a new Financial Responsibilities Policy. We will roll-out new, strengthened financial controls in 2024 to mitigate this risk.

# REFERENCE AND ADMINISTRATIVE DETAILS

| | |
|---|---|
| **Charity Name** | The Jo Cox Foundation |
| **Charity Number** | 1170836 |
| **Company Number** | 10392667 (England and Wales) |
| **Registered Office** | Jo Cox House, 90 Commercial Street, Batley, WF17 5DS |

**Chief Executive Officer**

Su Moore

**Trustees and Directors**

The Trustees who served during the year, or who served at the time that this report and financial statements were approved, and were also Directors of the company, were as follows:

Amanda Chetwynd-Cowieson
Eloise Todd
Geethika Jayatilaka
Rt Hon Jacqui Smith (resigned 6 July 2024)
Jane Brady (resigned 15 May 2023)
Jennie Richmond
Nisha Jani
Rosamund Blomfield-Smith
Samantha Vickers
Steve Morris

**Bankers**

Metro Bank Plc, 1 Southampton Row, London, WC1B 5HA

**Independent Examiner**

Kevin Fisher, FCA Myrus Smith, Chartered Accountants
Norman House, 8 Burnell Road, Sutton, Surrey, SM1 4BW

# STATEMENT OF TRUSTEES' AND DIRECTORS' RESPONSIBILITIES

The Trustees, who are also Directors of The Jo Cox Foundation for the purposes of company law, are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The Trustees confirm that they have complied with the duty in Section 17(5) of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Company law requires the Directors to prepare financial statements for each financial year. Under company law the Trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of the affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the Directors are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities' Statement of Recommended Practice 2019 (FRS102);
- make judgements and estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Directors are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and which enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the

prevention and detection of fraud and other irregularities.

The financial statements have been prepared in accordance with the special provisions for small companies under Part 15 of the Companies Act 2006.

**Signed on behalf of the Trustees:**



**Rosamund Blomfield-Smith, Interim Chair of Trustees**

Date: 3 September 2024

# REPORT OF THE INDEPENDENT EXAMINER

### Independent Examiner's Report to the Trustees of The Jo Cox Foundation

I report to the charity Trustees on my examination of the accounts of the company for the year ended 31 December 2023 which are set out on pages 28 to 48.

### Responsibilities and basis of report

As the charity Trustees of the company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your company's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

### Independent Examiner's statement

Since the company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of The Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or

4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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.



**Kevin Fisher, FCA**
Date: 3 September 2024

For and on behalf of Myrus Smith
Chartered Accountants
Norman House, 8 Burnell Road, Sutton, Surrey, SM1 4BW

THE JO COX FOUNDATION

# STATEMENT OF FINANCIAL ACTIVITIES

(incorporating Income and Expenditure Account)

FOR THE YEAR ENDED 31 DECEMBER 2023

| | Notes | Unrestricted Funds £ | Restricted Funds £ | 2023 Total £ | 2022 Total £ |
|---|---|---|---|---|---|
| **Income** | | | | | |
| Donations and legacies | 2 | 201,972 | - | 201,972 | 191,260 |
| Charitable activities | 3 | - | 455,231 | 455,231 | 432,996 |
| Other income | 4 | 27,524 | - | 27,524 | 5,259 |
| **Total** | | 229,496 | 455,231 | 684,727 | 629,515 |
| **Expenditure** | | | | | |
| Raising funds | 5 | 80,344 | - | 80,344 | 68,435 |
| Charitable activities | 6 | 96,825 | 471,745 | 568,570 | 523,054 |
| **Total** | | 177,169 | 471,745 | 648,914 | 591,489 |
| **Net income / (expenditure) for the year** | | 52,327 | (16,514) | 35,813 | 38,026 |
| Transfer between funds | 16 | (70) | 70 | - | - |
| **Net movement in funds** | | 52,257 | (16,444) | 35,813 | 38,026 |
| Total funds brought forward | 16 | 121,848 | 140,793 | 262,641 | 224,615 |
| **Total funds carried forward** | 16 | 174,105 | 124,349 | 298,454 | 262,641 |

All income and expenditure derives from continuing activities. The statement of financial activities includes all gains and losses recognised during the year.

The notes on pages 32 to 48 form part of the financial statements.

THE JO COX FOUNDATION

# BALANCE SHEET

AS AT 31 DECEMBER 2023

| | Notes | 2023 £ | 2023 £ | 2022 £ | 2022 £ |
|---|---|---|---|---|---|
| **Fixed Assets** | | | | | |
| Tangible assets | 11 | | 3,184 | | 3,188 |
| Intangible assets | 12 | | 31,053 | | - |
| | | | 34,237 | | 3,188 |
| **Current Assets** | | | | | |
| Debtors | 13 | 16,883 | | 29,179 | |
| Cash at bank and in hand | | 281,381 | | 249,201 | |
| | | 298,264 | | 278,380 | |
| **Liabilities** | | | | | |
| Creditors: Amounts falling due within one year | 14 | 34,047 | | 18,927 | |
| **Net Current Assets** | | | 264,217 | | 259,453 |
| **Net Assets** | 15 | | 298,454 | | £262,641 |
| **Funds** | | | | | |
| Unrestricted | 16 | | 174,105 | | 121,848 |
| Restricted | 16 | | 124,349 | | 140,793 |
| | 16 | | 298,454 | | 262,641 |

The company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 December 2023.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 December 2023 in accordance with Section 476 of the companies Act 2006.

The Directors acknowledge their responsibilities for:

(a) ensuring that the company keeps accounting records which comply with Sections 386 and 387 of the Companies Act 2006 and

(b) preparing financial statements which give a true and fair view of the state of affairs of the company as at the end of each financial year and of its profit and loss for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the company.

The financial statements have been prepared in accordance with the special provisions for small companies under Part 15 of the Companies Act 2006.

The financial statements were approved and authorised for issue by the Trustees on 3 September 2024 and signed on its behalf by:



Rosamund Blomfield-Smith
Interim Chair of Trustees

The notes on pages 32 to 48 form part of the financial statements.

# STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED 31 DECEMBER 2023

| | Notes | 2023 | 2022 |
|---|---|---|---|
| | | £ | £ |
| **Cash flows from operating activities** | | | |
| Net movement in funds per statement of financial activities | | 35,813 | 38,026 |
| Adjustments for: | | | |
| Depreciation charges | 11 | 1,228 | 1,090 |
| Amortisation charged | 12 | 2,842 | - |
| (Increase) / decrease in debtors | | 12,296 | 24,192 |
| (Decrease) / increase in creditors | | 15,120 | (50,268) |
| ***Net cash provided by / (used in) operating activities*** | | 67,299 | 13,040 |
| **Cash flows from investing activities** | | | |
| Purchase of tangible fixed assets | 11 | (1,224) | (3,058) |
| Purchase of intangible fixed assets | 12 | (33,895) | - |
| ***Net cash provided by / (used in) investing activities*** | | (35,119) | (3,058) |
| **Change in cash at bank in the year** | | 32,180 | 9,982 |
| Cash at bank brought forward | | 249,201 | 239,219 |
| **Cash at bank carried forward** | | 281,381 | 249,201 |

The notes on pages 32 to 48 form part of the financial statements.

THE JO COX FOUNDATION

# NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 DECEMBER 2023

## 1. ACCOUNTING POLICIES

### Basis of preparation and assessment of going concern

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention. The financial statements are presented in sterling which is the functional currency of the charity.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

The Trustees consider that there are no material uncertainties about the charity's ability to continue as a going concern.

### Income recognition

Items of income are recognised in the financial statements when all of the following criteria are met:

- the charity has entitlement to the funds;
- any performance conditions have been met or are fully within the control of the charity;
- there is sufficient certainty that receipt of the income is considered probable; and
- the amount can be measured reliably.

## 1. ACCOUNTING POLICIES (cont'd)

### Expenditure recognition

Expenditure is recognised once there is a legal or constructive obligation to make payment to a third party, it is probable that settlement will be required and the amount can be measured reliably.

Expenditure includes those costs of a direct nature which can be allocated to a specific activity. It also includes indirect costs, including governance costs that do not relate to a specific activity but are necessary to support those activities. Support costs are apportioned to each activity on the basis of staff time or on a basis which is designed to reflect the use of the resources.

### Fund accounting

Unrestricted general funds are freely available for use in furtherance of the objects of the charity and which have not been designated for particular purposes.

Designated funds are unrestricted funds set aside by the trustees for particular purposes.

Restricted funds are funds which can only be used in accordance with specific restrictions imposed by the donor or which have been raised for a particular purpose.

### Tangible fixed assets

All expenditure on capital items costing less than £100 is written off in the year of purchase.

Depreciation is provided so as to write off the cost of each asset over its estimated useful life at the following annual rate:

| | |
|---|---|
| Computer equipment | 33% on straight line basis |

## 1. ACCOUNTING POLICIES (cont'd)

### Intangible fixed assets

All expenditure on capital items costing less than £1,000 is written off in the year of purchase.

Amortisation is provided so as to write off the cost of each asset over its estimated useful life at the following annual rate:

| | |
|---|---|
| Website and database | 20% on straight line basis |

### Leases

Operating lease rentals are charged to the Statement of Financial Activities on a straight line basis over the period of the lease.

### Pensions

The charity operates a defined contribution pension scheme. Contributions payable under the scheme are charged to the Statement of Financial Activities in the year to which they relate.

### Debtors and creditors

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in the Statement of Financial Activities.

**NOTES TO THE FINANCIAL STATEMENTS**

FOR THE YEAR ENDED 31 DECEMBER 2023 (cont'd)

## 2. DONATIONS AND LEGACIES

| | Unrestricted funds | Total 2023 | Total 2022 |
|---|---|---|---|
| | £ | £ | £ |
| Donations | 123,236 | 123,236 | 176,260 |
| Legacies | 78,736 | 78,736 | 15,000 |
| | 201,972 | 201,972 | 191,260 |

All of the £191,260 recognised in 2022 related to unrestricted funds.

## 3. INCOME FROM CHARITABLE ACTIVITIES

| | Restricted funds | Total 2023 | Total 2022 |
|---|---|---|---|
| | £ | £ | £ |
| Stronger Communities: | | | |
| Yorkshire Programme | 40,840 | 40,840 | - |
| Moment to Movement project | - | - | 260,348 |
| More in Common Programme | 154,533 | 154,533 | 40,000 |
| Great Get Together | 83,577 | 83,577 | 20,998 |
| Connection Coalition | 89,650 | 89,650 | 111,650 |
| Respectful Politics | 24,202 | 24,202 | - |
| Core charitable activities | 62,429 | 62,429 | - |
| Grants and other income | 455,231 | 455,231 | 432,996 |

All of the £432,996 recognised in 2022 related to restricted funds.

**NOTES TO THE FINANCIAL STATEMENTS**

FOR THE YEAR ENDED 31 DECEMBER 2023 (cont'd)

## 4. OTHER INCOME

| | Unrestricted funds £ | Restricted funds £ | Total 2023 £ | Total 2022 £ |
|---|---|---|---|---|
| Jo Cox Way kit and subsistence | 3,091 | - | 3,091 | 5,259 |
| Jo Cox Way entry fees | 18,497 | - | 18,497 | - |
| Other income | 5,936 | - | 5,936 | - |
| | 27,524 | - | 27,524 | 5,259 |

## 5. COST OF RAISING FUNDS

| | Direct costs £ | Support costs £ | Total 2023 £ | Total 2022 £ |
|---|---|---|---|---|
| Fundraising events and materials | 33,882 | - | 33,882 | 26,362 |
| Staff costs | 34,279 | 11,653 | 45,932 | 41,619 |
| Training costs | 114 | - | 114 | 454 |
| IT costs | - | 382 | 382 | - |
| Stationery and postage | - | 34 | 34 | - |
| | 68,275 | 12069 | 80,344 | 68,435 |

All of the £68,435 expenditure recognised in 2022 was charged to unrestricted funds.

## 6. EXPENDITURE ON CHARITABLE ACTIVITIES

| | Direct costs (note 7) | Support costs (note 8) | Total 2023 | Total 2022 |
|---|---|---|---|---|
| Stronger Communities: | | | | |
| Yorkshire Programme | 76,431 | 12,468 | 88,899 | 73,520 |
| Moment to Movement project | - | - | - | 205,210 |
| More in Common Programme | 91,707 | 8,365 | 100,072 | - |
| Great Get Together | 102,844 | 9,213 | 112,057 | - |
| Connection Coalition | 69,406 | 6,372 | 75,778 | 49,456 |
| Respectful Politics | 46,411 | 4,130 | 50,541 | 27,673 |
| Fairer World | 11,392 | 1,013 | 12,405 | 8,303 |
| Core charitable activities | 92,641 | 36,177 | 129,436 | 158,892 |
| | 490,832 | 77,738 | 569,188 | 523,054 |

Of the £523,054 expenditure recognised in 2022, £94,130 was charged to unrestricted funds and £428,924 was charged to restricted funds.

## 7. ANALYSIS OF DIRECT COSTS

| | Total 2023 £ | Total 2022 £ |
|---|---|---|
| Staff salaries | 390,769 | 378,742 |
| Miscellaneous HR costs | 1,190 | 1,373 |
| Recruitment and training | 3,206 | 5,721 |
| Travel and subsistence | 13,117 | 6,632 |
| Consultancy | - | 10,738 |
| Marketing and advertising | 26,123 | 15,831 |
| Websites and database | 28,193 | 24,604 |
| Project costs | 21,704 | 24,949 |
| Monitoring and Evaluation | 6,530 | 8,510 |
| Depreciation | - | 1,090 |
| | 490,832 | 478,190 |

## 8. ANALYSIS OF SUPPORT COSTS

| | Total 2023 £ | Total 2022 £ |
|---|---|---|
| Staff salaries | 46,613 | - |
| Payroll costs | 3,080 | - |
| IT costs | 4,639 | 4,576 |
| Bank charges | 515 | 761 |
| Premises and related costs | 11,500 | 26,469 |
| Insurance | 158 | - |
| Depreciation | 1,228 | - |
| Amortisation | 2,842 | |
| Governance costs (see note 9) | 2,119 | 7,609 |
| Stationery and postage | 2,611 | 3,566 |
| Telephone and internet | 883 | 987 |
| Subscriptions | 1,550 | 896 |
| | 77,738 | 44,864 |

## 9. GOVERNANCE COSTS

| | 2023 £ | 2022 £ |
|---|---|---|
| Independent Examination fees | 1,878 | 4,248 |
| Insurance | - | 2,790 |
| Board costs | 241 | 571 |
| | 2,119 | 7,609 |

## 10. STAFF COSTS

| | 2023 | 2022 |
|---|---|---|
| | £ | £ |
| Wages and salaries | 437,496 | 383,321 |
| Social security costs | 36,456 | 29,077 |
| Pension costs | 9,362 | 7,963 |
| | 483,314 | 420,361 |

The average number of employees during the year was as follows:

| Particulars of employees: | 2023 | 2022 |
|---|---|---|
| | No. | No. |
| Chief Executive | 1 | 1 |
| Administrative staff | 4.5 | 4 |
| Charitable activities | 10.5 | 7 |
| | 16 | 12 |

Total employee benefits received by key management, including employer's pension costs, amounted to £76,676 (2022: £73,307).

Under FRS 102, employee benefits include gross salary, benefits in kind, employer's national insurance and employer's pension costs.

One employee received total employee benefits (excluding employer pension costs) between £60,000 and £70,000 during the financial years 2023 (2022: 1).

No trustee received any remuneration during the year and previous year. No trustee (2022: 3) was reimbursed for their travel and subsistence during the year (2022 : £372).

**NOTES TO THE FINANCIAL STATEMENTS**

FOR THE YEAR ENDED 31 DECEMBER 2023 (cont'd)

## 11. TANGIBLE FIXED ASSETS

| | Computer Equipment | Total |
|---|---|---|
| | £ | £ |
| Cost | | |
| At 1 January 2023 | 3,931 | 3,931 |
| Additions | 1,224 | 1,224 |
| Disposals | - | - |
| At 31 December 2023 | 5,155 | 5,155 |
| Depreciation | | |
| At 1 January 2023 | 743 | 743 |
| Charged in the year | 1,228 | 1,228 |
| Eliminated on disposals | - | - |
| At 31 December 2023 | 1971 | 1971 |
| Net book value | | |
| 31 December 2023 | 3,184 | 3,184 |
| 31 December 2022 | 3,188 | 3,188 |

## 12. INTANGIBLE FIXED ASSETS

| | Website & Database | Total |
|---|---|---|
| | £ | £ |
| Cost | | |
| At 1 January 2023 | - | - |
| Additions | 33,895 | 33,895 |
| Disposals | - | - |
| At 31 December 2023 | 33,895 | 33,895 |
| Amortisation | | |
| At 1 January 2023 | - | - |
| Charged in the year | 2,842 | 2,842 |
| Eliminated on disposals | - | - |
| At 31 December 2023 | 2,842 | 2,842 |
| Net book value | | |
| 31 December 2023 | 31,053 | 31,053 |
| 31 December 2022 | - | - |

## 13. DEBTORS

| | 2023 | 2022 |
|---|---|---|
| | £ | £ |
| Trade debtors | - | 3,500 |
| Prepayments and Accrued income | 16,277 | 17,428 |
| Other debtors | 606 | 8,251 |
| | 16,883 | 29,179 |

## 14. CREDITORS

| Amounts falling due within one year | 2023 | 2022 |
|---|---|---|
| | £ | £ |
| Trade Creditors | 3,976 | 2,386 |
| Amounts owed to group undertakings | 2,398 | 3,017 |
| Accruals | 16,400 | 13,524 |
| Taxation and Social Security | 9,321 | - |
| Pensions | 1,952 | - |
| | 34,047 | 18,927 |

## 15. ANALYSIS OF NET ASSETS BETWEEN FUNDS

| 2023 | Unrestricted Funds £ | Designated Funds £ | Restricted Funds £ | Total Funds £ |
|---|---|---|---|---|
| Fixed assets | - | 34,237 | - | 34,237 |
| Current assets | 173,915 | - | 124,349 | 298,264 |
| Current liabilities | (34,047) | - | - | (34,047) |
| Net assets at 31 December 2023 | 139,868 | 34,237 | 124,349 | 298,454 |

Comparative information for the previous financial year is as follows:

| 2022 | Unrestricted Funds £ | Designated Funds £ | Restricted Funds £ | Total Funds £ |
|---|---|---|---|---|
| Fixed assets | 3,188 | - | - | 3,188 |
| Current assets | 137,587 | - | 140,793 | 278,380 |
| Current liabilities | (18,927) | - | - | (18,927) |
| Net assets at 31 December 2022 | 121,848 | - | 140,793 | 262,641 |

## 16. MOVEMENT IN FUNDS

| | At 1 January 2023 | Income | Expenditure | Transfers | At 31 December 2023 |
|---|---|---|---|---|---|
| **2023** | | | | | |
| **Restricted funds:** | £ | £ | £ | £ | £ |
| Batley and Spen | 5,000 | 16,100 | (12,700) | - | 8,400 |
| Esmee Fairbairn | 6,345 | 4,000 | (10,345) | - | - |
| Spirit of 2012 | 28,480 | 197,428 | (225,908) | - | - |
| Astra Connection Coalition | 100,968 | 89,650 | (132,181) | - | 58,437 |
| Joseph Rowntree Reform Trust | - | 24,202 | (21,151) | - | 3,051 |
| Lottery: Bringing People Together | - | 99,103 | (44,642) | - | 54,461 |
| Leeds City Council | - | 24,748 | (24,818) | 70 | 0 |
| **Total restricted funds** | 140,793 | 455,231 | (471,745) | 70 | 124,349 |
| **Unrestricted funds:** | | | | | |
| General funds | 121,848 | 229,496 | (173,099) | (38,377) | 139,868 |
| Fixed assets | - | - | (4,070) | 38,307 | 34,237 |
| **Total unrestricted funds** | 121,848 | 229,496 | (177,169) | (70) | 174,105 |
| **Total funds** | 262,641 | 684,727 | (648,914) | - | 298,454 |

## NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 DECEMBER 2023 (cont'd)

### 16. MOVEMENT IN FUNDS (cont'd)

Comparative information for the previous financial year is as follows:

| | At 1 January 2022 | Income | Expenditure | Transfers | At 31 December 2022 |
|---|---|---|---|---|---|
| **2022** | | | | | |
| **Restricted funds:** | £ | £ | £ | £ | £ |
| Batley and Spen | 14,259 | - | (9,259) | - | 5,000 |
| Esmee Fairbairn | 15,744 | 40,000 | (49,399) | - | 6,345 |
| Spirit of 2012 | (2) | 260,348 | (231,866) | - | 28,480 |
| Innox Foundation | 10,681 | - | (10,681) | - | - |
| Astra Connection Coalition | 84,476 | 111,650 | (95,158) | - | 100,968 |
| Joseph Rowntree Reform Trust | 11,402 | - | (8,323) | (3,079) | - |
| DCMS | 3,240 | 20,998 | (24,238) | - | - |
| **Total restricted funds** | 139,800 | 432,996 | (428,924) | (3,079) | 140,793 |
| **Total unrestricted funds** | 84,815 | 196,519 | (162,565) | 3,079 | 121,848 |
| **Total funds** | 224,615 | 629,515 | (591,489) | - | 262,641 |

## 16. MOVEMENT IN FUNDS (cont'd)

### Purpose of restricted funds

Restricted funds are money earmarked for activities stipulated by the funder and used for the objectives set by them. These funds are detailed here:

| | |
|---|---|
| Batley and Spen | Community projects delivered in Batley and Spen |
| Esmee Fairbairn | More in Common network |
| Spirit of 2012 | Moment to Movement project |
| Innox Foundation | Youth loneliness projects |
| Astra Connection Coalition | Connection Coalition |
| Joseph Rowntree Reform Trust (2022) | Civility in Politics Awards |
| DCMS | Great Winter Get Together campaign |
| Joseph Rowntree Reform Trust (2023) | Jo Cox Civility Commission |
| Lottery: Bringing People Together | More in Common partnerships project |
| Leeds City Council | Great Get Together/Migration Yorkshire collaboration |

### Designated funds

In 2023 the Trustees decided that the net book value of the fixed assets should be designated as it does not form part of the free reserves of the charity.

These assets are used to support charitable activities and are depreciated (tangible fixed assets) or amortised (intangible fixed assets) in accordance with the relevant accounting policies as laid out in note one on pages 33 and 34.

## 17. COMMITMENTS UNDER OPERATING LEASES

The total future minimum lease payments due under non-cancellable operating leases are as follows:

| | 2023 Land and Buildings £ | 2022 Land and Buildings £ |
|---|---|---|
| Within one year | 364 | 1,708 |
| Within one to five years | - | - |
| | 364 | 1,708 |

## 18. COMPANY STATUS

The Jo Cox Foundation is a private company limited by guarantee and has no share capital. It is incorporated in Great Britain and registered in England and Wales. Each member is liable to contribute a sum not exceeding £1 in the event of the Company being wound up. The address of the registered office can be found in the Reference and Administration details on page 23.

## 19. TAXATION

The charitable company is exempt from corporation tax on its charitable activities.

## 20. CONTINGENT ASSETS

The amount of funding awarded to the charity but not recognised at 31 December 2023 was £399,409 (2022: £390,077).

**THE JO COX FOUNDATION**

England & Wales - Charity number 1170836

# Accounts

THE JO COX FOUNDATION

# TRUSTEES' REPORT AND ACCOUNTS 2022


Credit: Zain Lambat





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# Rt Hon Jacqui Smith

## Chair of Trustees



I am proud of how the Jo Cox Foundation has emerged from the challenges of the Covid pandemic. When people were forced apart in the first lockdown, we set up the Connection Coalition to bring organisations together and to support work to strengthen social relationships. We continue this work and used our members' experiences to alert Ministers to the impact of the cost of living crisis on them and other organisations.

We maintain close relationships with politicians across the spectrum and were pleased to engage with 150 MPs in person ahead of our successful Great Get Together in June 2022. This has become such an important part of the calendar for the many local groups and individuals who bring people together in a range of fun and imaginative ways. And we're growing the impact of this to work year-round in our network of More in Common groups.

We have taken the opportunity to renew our strategy post pandemic to ensure that we continue to make meaningful change on issues that Jo was passionate about. We will focus on three areas of work – nurturing stronger communities, championing respect in politics and advocating for a fairer world. And we'll be informed by the values by which Jo lived her life: we're ambitious, collaborative and empathetic. At the heart of our work is Jo's belief that we have more in common than that which divides us.

This year, as well as growing our work with communities we will have a particular focus on the issue of respectful politics. With co-chairs Baroness Gabby Bertin and Lord Vernon Coaker, we launched the Jo Cox Civility Commission in early 2023. We will gather evidence - from elected politicians, from those who work with them and those who want to see a vibrant and inclusive democratic system - about how we can improve the quality and civility of public debate and encourage more people to take part and stand for public office. From this we will develop our recommendations and we would love to hear from anybody with experiences or ideas to share: visit jocoxfoundation.org/commission.

We're proud of our continued achievement and excited about the year ahead. I am grateful to our CEO Su Moore and our committed, enthusiastic and busy staff team. My fellow trustees continue to provide wisdom, experience and guidance to the Foundation and I'm very glad to have them alongside me in this enormously fulfilling role. Thank you to all those who have supported our work this year – in difficult financial times we are particularly keen to encourage even more support. If you can donate to our work, please do so at jocoxfoundation.org/donate.

Thank you!

# Su Moore

## Chief Executive



**Though we were proud to have been able to continue connecting communities throughout the Covid restrictions, it was such a pleasure to be able to bring people back together in person for June's Great Get Together. Our organisers outdid themselves, and we saw an even greater range of events than ever before. Communities were brought together through sport, gardening, crafting and food, truly celebrating that we do have more in common than that which divides us.**

The Great Get together also provided the inspiration for a new development in our work – the evolution of the More in Common Partnership. As part of the campaign, 12 organisations in Cardiff came together to run a community event at the Grangetown Pavilion. Inspired by the success of this event, they decided to continue working together, and invite others to join. The Partnership now has over 60 organisations working collaboratively to bring people together, tackle divides, and address local issues.

The shadow of Covid does still impact our work, with some remaining anxious about coming together in person. A new crisis has also altered the way we work, and we have been forced to reassess our programmes in the light of the sharp increases in the cost of living. It is with the Connection Coalition members that we have particularly seen this impact, with small, hyper-local groups and organisations worrying about their on-going survival. We have been determined to amplify the voices of these members. Our *On the Brink of Closure* report detailed what we'd found from members, and we shared this widely - including with key government ministers - lobbying for support to help the sector.

As well as our very visible work, there has also been much going on that you won't have seen. As Jacqui has mentioned, refreshing our organisational strategy has been a key focus for this year, and the whole team look forward to implementing the revised strategy, and making even more of a positive impact on issues that Jo was passionate about. As part of this, we have launched the Jo Cox Civility Commission in early 2023, one of the Foundation's most significant pieces of work to date. The issue of abuse and intimidation of elected politicians is getting worse, and we're determined to find concrete solutions to address it.

Before I sign off, I want to say thank you to the Foundation team whose dedication, hard work and good humour is a credit to the organisation. Thank you also to our funders who enable us to keep making a difference every day in Jo's name.

# About the Jo Cox Foundation

**Jo Cox was a passionate campaigner, activist and humanitarian; a proud Yorkshire lass and internationalist; and a devoted mum, daughter, sister, wife, friend and MP.**

The Jo Cox Foundation makes meaningful change on issues that Jo was passionate about. Like Jo, we believe that a kinder, fairer and more connected world is possible. Underpinning this belief is the understanding that we have more in common than that which divides us. As we work to make change, we follow Jo's example of collaborating with others and bringing people together to achieve more than we can alone.

We work in three areas. We nurture stronger communities, champion civility in politics and advocate for a fairer world.

We focus on making change led by the values by which Jo lived her life and are guided by the following principles:

**Ambitious:**
**This means:** We believe, like Jo, that there should be no 'too difficult to deal with' pile

**Collaborative**
**This means:** We believe that achieving real change requires us all to pool our strengths and exchange our skills and resources

**Empathetic**
**This means:** We believe that kindness and compassion are signs of strength, and that only by understanding others can we build relationships and bridge divides

# Stronger Communities

**We want less lonely, better connected communities across the UK, where everyone feels that they belong. Over the past 12 months:**

## We addressed loneliness

Taking place from 17 to 29 January, our Great Winter Get Together shone a light on loneliness at what can be a difficult time of year for many. With a tagline of 'there's no shame in sharing', the campaign had two main aims – to reduce the stigma associated with talking about loneliness, and to raise awareness of the fact that young people are the loneliest in society. 1.47 million people took part of whom 79% said it made them feel less embarrassed talking about loneliness.




**LEE GARDENS POOL, a community swimming pool in South Wales**

Such a lovely Great Winter Get Together this morning.

It might be Blue Monday but there were lots of smiles so we've decided to hold another coffee morning next Monday.

**Photo**: @LeeGardensPool (Twitter)



We continued to promote our loneliness chatbot - which helps people experiencing loneliness and directs them to the best support possible - in collaboration with Whatsapp. We even had the opportunity to present the bot to Prince Charles, an excellent opportunity to raise the importance of the issue.

## We brought communities together

June saw the 6th annual Great Get Together. Over 400 events took place around the country, including picnics, walks and musical celebrations. 92% of organisers told us it made them happier. We secured 284 pieces of press coverage, and our social media advertising reached 4.3m people.

### KUMON Y'ALL's GREAT GET TOGETHER STORY

Kumon Y'All, a local youth charity in Kirklees, used the Great Get Together as a way to unite communities and bring people from different ethnic backgrounds together.

Farook from Kumon Y'All approached Manor Croft Academy in Dewsbury, based in a traditionally polarised area, to run a Boccia event. Boccia is a game similar to boules which can be played by anyone, no matter their age or ability. The plan for the event was simple - to come together, to play Boccia, have some food and connect!

**As a result new connections and relationships were developed, bridging the divide between communities.**



Since June, Kumon Y'all have been able to establish activities in the area (one where they've struggled to work for 20 years), have developed young leaders and are planning further events to continue to bridge divides.

Leading up to the Great Get Together, we piloted a new project in Yorkshire, designed to explore concepts of belonging in the Kirklees area. We recruited a group of 12 people who came together over the space of eight weeks, working collaboratively to plan and deliver a Great Get Together event. The final event, the Great Craft Together, was a real success, bringing together nearly 100 people. The piece below from the Yorkshire Post talks about the project in more detail:

https://bit.ly/belonging-op-ed

## PARTICIPANT IN THE BELONGING PROJECT

I learned a great deal about the area. **I arrived with some preconceptions that were challenged positively.**

The whole experience gained chimes with the 'more in common' slogan, and I hope this event, our planning meetings, will signal a continued effort to keep highlighting togetherness.

**When people stand together much can be achieved.**



As Covid restrictions have eased, we're seen a strong growth in our More in Common network, with new groups in Leek, Longbenton and Bradford. Groups continue to do fantastic work to bring their communities together. In Batley, our More in Common group was able to celebrate the Run for Jo in person for the first time since 2019, welcoming participants for an afternoon of community fun and togetherness.

We also piloted a new model for the network: the More in Common Partnership. Evolving from work done in Cardiff for the Great Get Together, Partnerships bring organisations, rather than individuals together. The Cardiff group now has 60 organisations working together, and this has inspired a Partnership to form in Nottingham too.

## COHESION OFFICER, CARDIFF COUNCIL

I've tried to find a way of bringing organisations together to address some of the issues we've had locally, but it's never worked before. It was a welcome surprise how easy it was to get people involved when they heard about the link with The Jo Cox Foundation!



The **more in common message is what brought all of these groups together** - that's the goal that we're all working towards.

## We convened

Our Connection Coalition was set up at the beginning of the pandemic to bring together organisations and groups who work to promote connection and cohesion, and to alleviate loneliness. We welcomed 150 new members in 2022, taking us to over 1000 members in total.

**CONNECTION COALITION MEMBER**

It is a force for good and **well placed to pull together disparate organisations to work together** and support each other.




The cost of living crisis is having a huge impact on small organisations. In October we asked the Connection Coalition how it was impacting them, and published our report: *On the Brink of Closure: Can Small Charities Survive the Cost of Living Crisis?*. This made for alarming reading, with 44% of respondents not sure if their organisation was viable over the next year. We shared the findings from the report with key Ministers and other politicians, as well as in public forums, including at the Conservative Party Conference.

**PARTICIPANT IN THE CONNECTION COALITION INFORMAL GET TOGETHERS**

It was the first place I was able to share my feelings of loneliness and frustration and reflect on how my personal experience might be useful in my community work. Other members were empathic, creative and encouraging.

The variety of experiences of people, and the organisations they are from, **gives me really helpful insights and a sense of belonging**.



# Respectful Politics

**We want anyone, regardless of their background, to feel able to participate in our political discourse and be treated with respect. In particular, we seek to end the abuse and intimation that discourages so many from entering political life, and particularly impacts diverse representation.**

This year we promoted civility at election times through our civility pledge at the May elections. Our polling showed us that over half (54%) of the public would be less likely to vote for a political candidate who spoke insultingly about others in the running, a fact that we reinforced through the campaign. Our pledge was shared by candidates from a wide range of parties.

## HAVERING COUNCILLORS' CIVILITY PLEDGE

In Havering, candidates from across political parties came together to show a united front against abuse during the election campaign.

On 22 April, 18 candidates, including the Leader of the Council, gathered outside the Town Hall to share the pledge.

Councillor Gillian Ford, Chair of Havering's Residents' Association, said:
**"There's so much violence and aggression towards politicians and I think, as politicians, we need to be setting examples ourselves to the public so they can see what we're doing and how we're leading."**



**Photo**: Chantelle Bilson for the Romford Recorder

We raised awareness of the issue of abuse and intimidation of elected politicians and the damaging impact it has on democracy. This included an op-ed in the Yorkshire Post (available at http://bit.ly/civility-pledge-2022-op-ed); speaking to over 150 people, alongside representatives from the EU Democracy team, at an event entitled *Strengthening Democracy and Reconciliation through Ethical and Respectful Political Discourse*; and addressing councillors at a Local Government Association event.

A key focus has been preparing for the launch of the Jo Cox Civility Commission in early 2023. Aimed at finding implementable solutions to the worsening problem of abuse and intimidation of elected politicians, the Commission will be one of the Foundation's most significant pieces of work to date. This year we appointed two co-chairs, Baroness Gabby Bertin and Lord Vernon Coaker. We also conducted extensive research, and worked closely with key partners for the project, including the Local Government Association.

**Baroness Gabrielle Bertin**
**Co-Chair of The Jo Cox Civility Commission**

This Commission is vital. Great progress has been made on representation in UK politics in recent years, but **only by tackling abuse and intimidation can we ensure this trend continues.**

Women still only make up 35% of MPs and yet they disproportionately receive abuse and intimidation. **The level of abuse is even worse for female MPs from a minority ethnic background.**

Without urgent action, we will not only see more and more women step back from public life but we will also struggle to attract a diverse pipeline of politicians in future.

**Lord Vernon Coaker**
**Co-Chair of The Jo Cox Civility Commission**

The abuse and aggression towards politicians - whether in-person or online - has changed dramatically during my time in Parliament and has got measurably worse since Jo Cox's murder.

**We must recognise that attacks on elected politicians are attacks on our democracy.**

By finding and presenting tangible solutions through this Commission, we sincerely hope that this issue will be treated with the urgency that it deserves.

# Fairer World

**We want responses to the world's complex problems to be informed by humanitarian approaches.**

This year we celebrated what's been achieved through the Jo Cox Memorial Grants. This grant programme, which was officially launched in 2020, had two strands of grant programmes - empowering women and preventing identity-based violence. With many of the grants ending this year, we wanted to celebrate what has been achieved in Jo's name. 21 projects have been funded in 14 countries. Over 85,000 people have benefited from the grants, of whom over 50,000 are women and girls. As part of International Humanitarian Day, we took part in an episode of The Learning Post, a podcast (available at https://bit.ly/jcmg-podcast), which reflected on Jo's legacy.

## JO COX MEMORIAL GRANT STORY: Internews, DRC

With Jo Cox Memorial Grant funding, Internews Europe supported women's networks to **take a leading role in conflict prevention in the Democratic Republic of the Congo**. While the project's primary aim was to increase their partners' capacity to monitor grassroots-level conflict so they can provide early warning information, evidence came to light through this work, regarding the important role of women in peace processes.

The predominantly female Nyunzu Early Warning Group **sensitively and actively contributed to the diffusion of a conflict**, and increased economic stability in a particularly unstable context.



As the grants come to an end, we've been in dialogue with the government in the hope that programmes may continue to exist that reflect Jo's international legacy.

We continue to be part of the Atrocity Prevention Working Group. This year we have worked with colleagues from the group on a number of initiatives, including welcoming

the proposals in the International Development Committee's *From Srebrenica to a safer future* report, and lobbying for funding for atrocity prevention work in the budget.

Jo's article in the Fabian Society rings true today as "sadly, there is currently no explicit UK policy on the prevention of mass atrocities". Such a strategy would put atrocity prevention at the heart of British foreign policy, and make it sustainable.

While able to criticise shortcomings, Jo was proud of Britain's contributions to international development and the protection of civilians. She firmly believed Britain could and should be a leader in this space. The introduction of a national atrocity prevention strategy would be a fitting and lasting honour to Jo Cox.

**Quotation from The Jo Cox Foundation's submission of evidence to The International Development Committee Inquiry,** which was cited in the Committee's 'From Srebrenica to a safer tomorrow' report in 2022.



# How we work

**The way that we work is as important to us as what we do. We lead by example and stay true to the values by which Jo lived her life in all of our day-to-day operations.**

In 2021 we committed to positive change towards ensuring that the organisation and our work is more inclusive. Throughout this year we continued to make progress on our equity, diversity and inclusion strategy, renewing our commitment to change both through our organisational structures and staff, and through our programmes. Included in this work, this year we have:

- Appointed a new Board EDI lead, Nisha Jani, supporting the organisation on its inclusivity journey.
- Worked with TPP Recruitment as part of the inclusive recruitment grant that we were awarded at the end of 2021. After working with them, we have updated our recruitment packs and practices.
- Enrolled in the Talentino scheme to offer work placements to young people with learning disabilities.

We continued to champion the importance of wellbeing and belonging for our staff team. In our annual staff survey, all staff gave the top rating to the statement 'I feel proud to work at the Jo Cox Foundation'.

Our focus on diversifying our funding continued. We raised money through participation in more challenge events, widened the range of trusts and foundations we work with, and received our first legacy. Our generous donors are vital to our work to continue to make a difference in Jo's name, and we remain extremely grateful for their support.

# Priorities for 2023

With our refreshed strategy, we're making even more significant change on issues that Jo was passionate about.

Key areas of focus in 2023 are:

- Launching **the Jo Cox Civility Commission**, a major project focused on finding implementable solutions to the worsening issue of abuse and intimidation of elected representatives. This is one of the most significant pieces of work to date.
- Continuing to **amplify the voices** of our Connection Coalition members as the cost of living crisis impacts their ability to deliver to their communities on the ground. We're determined to share what we know with the government, pushing for positive change on the issue.
- **Supporting communities through the cost of living crisis**, raising awareness of the impact on both loneliness and on the ability of people to come together.
- Deepening the impact of **our work in West Yorkshire**, supporting and bringing together communities.
- Celebrating Jo's more in common message once again with **the Great Get Together** in June, giving particular support to bringing communities together across lines of difference.
- **Lobbying the government** for a replacement for the Jo Cox Memorial Grants, ensuring that we can continue to celebrate her desire to support those most in need around the world.
- Continuing to **centre the importance of belonging**, both for the staff and Board of the Foundation, but also for those who are involved in our programmes. We want to understand, and address, barriers to belonging.
- Continuing to **diversify our funding streams** and ensuring a solid financial foundation for our future work.

# People

The Trustees would like to thank everyone who supported our work in 2022, particularly our dedicated and hard-working staff team. Without them, we couldn't achieve any of our work on issues that Jo was passionate about.

# Funders and partners

## Charitable trusts and foundations

- The Astra Foundation
- Esmée Fairbairn
- The Ian McTaggart Trust
- Innox Foundation
- The J. Davy Foundation
- Joseph Rowntree Reform Trust
- Lloyd's Bank Foundation
- Spirit of 2012

## Corporate donors

- Associated News
- Core Facility Services Ltd
- Drop Clothing
- Fox's Biscuits
- George Brooke Ltd
- Happy Beds
- MAN Group Plc
- Meta
- Neue Schule
- Paisley Properties
- Reg Naylor (Liversedge) Ltd
- Sovereign Healthcare

## Government grants

- DCMS
- The Kickstart Scheme

## Community events

Our thanks to everyone who participated in our two main community events in 2021: the Jo Cox Way and the Royal Parks Half Marathon.

## Individual donors

We continue to receive support from many individuals, including those who choose to make regular donations to us as Friends of the Jo Cox Foundation. We would like to thank all of those who donated to us in 2022.

# Financial review

**Funds raised**

Total income for the year was £629,515 (2021: £734,379); of which unrestricted income was £196,519 (2021: £189,242) and restricted income was £432,996 (2021: £545,137).

**Expenditure**

Total expenditure was £591,489, (2021: £742,691); of which unrestricted expenditure was £162,565 (2021: £205,966) and restricted expenditure was £428,924 (2021: £536,725).

This resulted in a surplus for the year of £38,026 (2021: deficit of £8,312).

## Reserves policy

JCF's reserves policy has been devised by analysing the charity's main financial obligations now, and in the future, the cost of reshaping the charity and the scale of risk to voluntary income to calculate a target sum of unrestricted funds to be held in reserve. Such a sum should be sufficient to ensure the continued operation of the charity in the medium term in the event of a drop in generated income.

The level of free reserves is continually monitored. It is monitored monthly by management as part of their review of the management accounts, and is reported to all meetings of both the Finance, Audit and Risk Committee and the full Board, so that Trustees can monitor and manage reserves effectively.

The target for 31 December 2022 was set at £151,394 in free reserves. At 31 December 2022, JCF held £121,848 in free reserves (2021: £84,815).

# Structure, governance and management

## Governing document

The Jo Cox Foundation is a charitable company, limited by guarantee, incorporated on 23 September 2016, and registered as a charity on 19 December 2016.

The company was established under a Memorandum and Articles of Association, which established the objects and powers of the charitable company, as amended by special resolution on 16 January 2018.

## Governance

The charity is governed by its Trustees. The Trustees also act as the members of the charity and its corporate Directors for the purposes of the Companies Act 2006. The Articles of Association outline the powers, responsibilities and decision-making of the Trustees.

## Recruitment and appointment of Trustees

The process for appointing Trustees to the Board of The Jo Cox Foundation is outlined in the Articles of Association. Three additional trustees were appointed during this period: Amanda Chetwynd-Cowieson, Geethika Jayatilaka and Nisha Jani.

## Trustee induction and training

Trustees are provided with a clear role description, outlining their statutory and additional responsibilities. New Trustees are provided with a thorough induction, including spending time with the CEO and Head of Ops and Finance. All Trustees are encouraged to take up relevant training and development to fulfil their role and responsibilities to the charity.

## Organisational structure and decision making

The Foundation has a Board of Trustees, with a minimum number of three Trustees. The Board of Trustees appoint a Chair of Trustees and Treasurer from amongst themselves. The Trustees are responsible for the strategic direction of the charity and oversight of its work and finances.

The Board of Trustees has a Finance, Audit and Risk Subcommittee. This committee is responsible for providing detailed scrutiny of the Foundation's finances, associated procedures and monitoring its risk. They are governed by Terms of Reference that were approved by the full Board and report back to the Board after every meeting.

The Trustees delegate day-to-day responsibility for the provision of services to the Chief Executive Officer. The Chief Executive Officer is responsible for ensuring the secure financial management and administration of the charity. Effective management and supervision of the staff team is the responsibility of the Chief Executive Officer.

## Remuneration of key personnel

The remuneration of the charity's key management personnel, the Chief Executive Officer, is set by the Board of Trustees, taking into account the charity's financial position and the amount paid for comparable roles in comparable organisations.

## Risk assessment

The Foundation regularly undertakes a detailed review and assessment of risks, both financial and non-financial, to which it is exposed in its current activities. These have been developed into a formal Risk Management process.

The Trustees have considered a summary of all major risks and have ensured that effective systems and controls exist to reduce internal risks and respond swiftly to external risks and minimise their impact.

Risks are monitored continually by the management team and reviewed regularly by the Trustees unless there are issues that need the Trustees' immediate attention.

The principal risk areas identified by the Trustees are:

- Reputational risk and perception of political bias: to mitigate this we communicate regularly with supporters and beneficiaries and have robust crisis communications procedures.
- Digital security incident: we have considered the likelihood of this risk to have increased and will take steps to review our safeguards.
- Long-term income: we continue to work to diversify our income streams and secure future funding, with a particular focus on the period from mid 2023 onwards.
- Wellbeing of staff impacted by the sensitive nature of our work: this is a key risk for the organisation, especially as we launch the Civility Commission and engage with the abuse and intimidation received by elected officials.
- Financial error, oversight or fraud: in 2022 we adopted a new Financial Responsibilities Policy. We will roll-out new, strengthened financial controls in 2023 to mitigate this risk.

# Reference and administrative details

| | |
|---|---|
| **Charity Name** | The Jo Cox Foundation |
| **Charity Number** | 1170836 |
| **Company Number** | 10392667 (England and Wales) |
| **Registered Office** | Jo Cox House, 90 Commercial Street, Batley, WF17 5DS |

**Chief Executive Officer**
Su Moore

**Trustees and Directors**
The Trustees who served during the year, or who served at the time this report and financial statements were approved, who were also Directors of the company, were as follows:

Amanda Chetwynd-Cowieson (appointed 8 February 2022)
Eloise Todd
Geethika Jayatilaka (appointed 1 April 2022)
Rt Hon Jacqui Smith
Jane Brady (resigned 15 May 2023)
Jennie Richmond
Nisha Jani (appointed 8 February 2022)
Rosamund Blomfield-Smith
Samantha Vickers
Steve Morris

**Bankers**
Metro Bank Plc
1 Southampton Row
London
WC1B 5HA

**Independent Examiner**
Stephen Jones, FCA
Myrus Smith, Chartered Accountants
Norman House, 8 Burnell Road, Sutton, Surrey, SM1 4BW

# Statement of Trustees' and Directors' responsibilities

The Trustees, who are also Directors of The Jo Cox Foundation for the purposes of company law, are responsible for preparing the Directors' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The Trustees confirm that they have complied with the duty in section 17(5) of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Company law requires the Directors to prepare financial statements for each financial year. Under company law the Trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of the affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the Directors are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities' Statement of Recommended Practice 2019 (FRS102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK accounting standards have been followed, subject to any material departures being disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Directors are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and which enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

**Signed on behalf of the Trustees:**



Rt Hon Jacqui Smith, Chair of Trustees

Date: 17 July 2023

# Report of the Independent Examiner

**Independent Examiner's Report to the Trustees of The Jo Cox Foundation**

I report to the charity Trustees on my examination of the accounts of the company for the year ended 31 December 2022 which are set out on pages 25 to 39.

**Responsibilities and basis of report**

As the charity Trustees of the company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your company's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

**Independent Examiner's statement**

Since the company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of The Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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.



Stephen Jones, FCA

Date: 17 July 2023

For and on behalf of Myrus Smith
Chartered Accountants
Norman House, 8 Burnell Road, Sutton, Surrey, SM1 4BW

# Statement of financial activities

(Incorporating Income and Expenditure Account)

FOR THE YEAR ENDED 31 DECEMBER 2022

| | Notes | Unrestricted Funds £ | Restricted Funds £ | 2022 Total £ | 2021 Total £ |
|---|---|---|---|---|---|
| **Income** | | | | | |
| Donations and legacies | 2 | 191,260 | - | 191,260 | 189,242 |
| Charitable activities | 3 | - | 432,996 | 432,996 | 535,137 |
| Other income | 4 | 5,259 | - | 5,259 | - |
| **Total** | | 196,519 | 432,996 | 629,515 | 734,379 |
| **Expenditure** | | | | | |
| Raising funds | 5 | 68,435 | - | 68,435 | 35,725 |
| Charitable activities | 6 | 94,130 | 428,924 | 523,054 | 706,966 |
| **Total** | | 162,565 | 428,924 | 591,489 | 742,691 |
| **Net income / (expenditure) for the year** | | 33,954 | 4,072 | 38,026 | (8,312) |
| Transfer between funds | 15 | 3,079 | (3,079) | - | - |
| **Net movement in funds** | | 37,033 | 993 | 38,026 | (8,312) |
| Total funds as at 1 January 2022 | 15 | 84,815 | 139,800 | 224,615 | 232,927 |
| **Total funds at 31 December 2022** | 15 | £121,848 | £140,793 | £262,641 | £224,615 |

All income and expenditure derives from continuing activities.

The statement of financial activities includes all gains and losses recognised during the year.

The notes on pages 29 to 39 form part of the financial statements.

# Balance sheet

AS AT 31 DECEMBER 2022

| | Notes | 2022 £ | 2022 £ | 2021 £ | 2021 £ |
|---|---|---|---|---|---|
| **Fixed Assets** | | | | | |
| Tangible assets | 11 | | 3,188 | | 1,220 |
| **Current Assets** | | | | | |
| Debtors | 12 | 29,179 | | 45,120 | |
| Cash at bank and in hand | | 249,201 | | 239,219 | |
| | | 278,380 | | 284,339 | |
| **Creditors**: Amounts falling due within one year | 13 | 18,927 | | 60,944 | |
| **Net Current Assets** | | | 259,453 | | 223,395 |
| **Net Assets** | 14 | | £262,641 | | £224,615 |
| **Funds** | | | | | |
| Unrestricted | 15 | | 121,848 | | 84,815 |
| Restricted | 15 | | 140,793 | | 139,800 |
| | | | £262,641 | | £224,615 |

The company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 December 2022.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 December 2022 in accordance with Section 476 of the companies Act 2006.

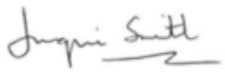
The Directors acknowledge their responsibilities for:

(a) ensuring that the company keeps accounting records which comply with Sections 386 and 387 of the Companies Act 2006 and

(b) preparing financial statements which give a true and fair view of the state of affairs of the company as at the end of each financial year and of its profit and loss for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the company.

The financial statements have been prepared in accordance with the special provisions for small companies under Part 15 of the Companies Act 2006.

The financial statements were approved and authorised for issue by the Trustees on 17 July 2023 and signed on its behalf by:



Rt Hon J J Smith
Trustee

The notes on pages 29 to 39 form part of the financial statements.

# Statement of cash flows

FOR THE YEAR ENDED 31 DECEMBER 2022

| | Notes | 2022<br>£ | 2021<br>£ |
|---|---|---|---|
| **Cash flows from operating activities** | | | |
| Net movement in funds per statement of financial activities | | 38,026 | (8,312) |
| Adjustments for: | | | |
| Depreciation charges | 11 | 1,090 | - |
| (Increase) / decrease in debtors | | 24,192 | (36,677) |
| (Decrease) / increase in creditors | | (50,268) | 51,582 |
| ***Net cash provided by / (used in) operating activities*** | | £13,040 | £6,593 |
| **Cash flows from investing activities** | | | |
| Purchase of tangible fixed assets | | (3,058) | (873) |
| ***Net cash provided by / (used in) investing activities*** | | £(3,058) | £(873) |
| **Change in cash at bank in the year** | | 9,982 | 5,720 |
| Cash at bank brought forward | | 239,219 | 233,499 |
| **Cash at bank carried forward** | | £249,201 | £239,219 |

The notes on pages 29 to 39 form part of the financial statements.

# Notes to the financial statements

FOR THE YEAR ENDED 31 DECEMBER 2022

## 1. ACCOUNTING POLICIES

### Basis of preparation and assessment of going concern

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention. The financial statements are presented in sterling which is the functional currency of the charity.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

The Trustees consider that there are no material uncertainties about the charity's ability to continue as a going concern.

### Income recognition

Items of income are recognised in the financial statements when all of the following criteria are met:

- the charity has entitlement to the funds;
- any performance conditions have been met or are fully within the control of the charity;
- there is sufficient certainty that receipt of the income is considered probable; and
- the amount can be measured reliably.

## 1. ACCOUNTING POLICIES (cont'd)

### Expenditure recognition

Expenditure is recognised once there is a legal or constructive obligation to make payment to a third party, it is probable that settlement will be required and the amount can be measured reliably.

Expenditure includes those costs of a direct nature which can be allocated to a specific activity. It also includes indirect costs, including governance costs that do not relate to a specific activity but are necessary to support those activities. Support costs are apportioned to each activity on the basis of staff time or on a basis which is designed to reflect the use of the resources.

### Fund accounting

Unrestricted general funds are freely available for use in furtherance of the objects of the charity and which have not been designated for particular purposes.

Designated funds are unrestricted funds set aside by the trustees for particular purposes.

Restricted funds are funds which can only be used in accordance with specific restrictions imposed by the donor or which have been raised for a particular purpose.

### Tangible fixed assets

All expenditure on capital items costing less than £1,000 is written off in the year of purchase.

Depreciation is provided so as to write off the cost of each asset over its estimated useful life at the following annual rate:

| | |
|---|---|
| Computer equipment | 33% on straight line basis |

### Leases

Operating lease rentals are charged to the Statement of Financial Activities on a straight line basis over the period of the lease.

### Pensions

The charity operates a defined contribution pension scheme. Contributions payable under the scheme are charged to the Statement of Financial Activities in the year to which they relate.

**Debtors and creditors**

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in the Statement of Financial Activities.

**2. DONATIONS AND LEGACIES**

| | Unrestricted funds £ | Total 2022 £ | Total 2021 £ |
|---|---|---|---|
| Donations | 176,260 | 176,260 | 189,242 |
| Legacies | 15,000 | 15,000 | - |
| | £191,260 | £191,260 | £189,242 |

All of the £189,242 recognised in 2021 related to unrestricted funds.

**3. INCOME FROM CHARITABLE ACTIVITIES**

| | Restricted funds £ | Total 2022 £ | Total 2021 £ |
|---|---|---|---|
| Grants and other income | £432,996 | £432,996 | £545,137 |

All of the £545,137 recognised in 2021 related to restricted funds.

**4. OTHER INCOME**

| | Unrestricted funds £ | Restricted funds £ | Total 2022 £ | Total 2021 £ |
|---|---|---|---|---|
| Jo Cox Way cycle kit and subsistence | £5,259 | £Nil | £5,259 | £Nil |

## 5. COST OF RAISING FUNDS

| | Direct costs £ | Support costs £ | Total 2022 £ | Total 2021 £ |
|---|---|---|---|---|
| Consultancy | - | - | - | 11,400 |
| Fundraising events and materials | 26,362 | - | 26,362 | 24,325 |
| Staff costs | 41,619 | - | 41,619 | - |
| Training costs | 454 | - | 454 | - |
| | £68,435 | £Nil | £68,435 | £35,725 |

All of the £35,725 expenditure recognised in 2021 was charged to unrestricted funds.

## 6. EXPENDITURE ON CHARITABLE ACTIVITIES

| | Direct costs | Support costs | Total 2022 | Total 2021 |
|---|---|---|---|---|
| Stronger Communities: | | | | |
| Yorkshire Programme | 67,968 | 5,552 | 73,520 | 95,977 |
| Moment to Movement project | 204,018 | 1,192 | 205,210 | 286,896 |
| Connection Coalition | 48,876 | 580 | 49,456 | 71,794 |
| Respectful Politics | 27,673 | - | 27,673 | 734 |
| Fairer World | 8,303 | - | 8,303 | - |
| Core charitable activities | 121,352 | 37,540 | 158,892 | 251,565 |
| | £478,190 | £44,864 | £523,054 | £706,966 |

Of the £706,966 expenditure recognised in 2021, £170,241 was charged to unrestricted funds and £536,725 was charged to restricted funds.

## 7. ANALYSIS OF DIRECT COSTS

| | Total 2022 £ | Total 2021 £ |
|---|---|---|
| Staff salaries including payroll costs | 378,742 | 411,842 |
| Miscellaneous HR costs | 1,373 | 1,068 |
| Recruitment and training | 5,721 | 36,840 |
| Travel and subsistence | 6,632 | 1,268 |
| Consultancy | 10,738 | 45,995 |
| Marketing and advertising | 15,831 | 10,852 |
| Websites and database | 24,604 | 18,514 |
| Project costs | 24,949 | 111,837 |
| Monitoring and Evaluation | 8,510 | 36,319 |
| Depreciation | 1,090 | - |
| | £478,190 | £674,535 |

## 8. ANALYSIS OF SUPPORT COSTS

| | Total 2022 £ | Total 2021 £ |
|---|---|---|
| IT costs | 4,576 | 4,245 |
| Bank charges | 761 | 659 |
| Premises and related costs | 26,469 | 13,752 |
| Governance costs (see note 10) | 7,609 | 10,720 |
| Stationery and postage | 3,566 | 2,759 |
| Telephone and internet | 987 | 296 |
| Subscriptions | 896 | - |
| | £44,864 | £32,431 |

## 9. GOVERNANCE COSTS

| | 2022 | 2021 |
|---|---|---|
| | £ | £ |
| Independent Examination fees | 4,248 | 8,892 |
| Insurance | 2,790 | 1,828 |
| Board costs | 571 | - |
| | £7,609 | £10,720 |

## 10. STAFF COSTS

| | 2022 | 2021 |
|---|---|---|
| | £ | £ |
| Wages and salaries | 383,321 | 366,933 |
| Social security costs | 29,077 | 38,057 |
| Pension costs | 7,963 | 6,852 |
| | £420,361 | £411,842 |

The average number of employees during the year was as follows:

| Particulars of employees: | 2022 | 2021 |
|---|---|---|
| | No. | No. |
| Chief Executive | 1 | 1 |
| Administrative staff | 4 | 4 |
| Charitable activities | 7 | 7 |
| | 12 | 12 |

Total employee benefits received by key management, including employer's pension costs, amounted to £73,307 (2021: £72,867).

Under FRS 102, employee benefits include gross salary, benefits in kind, employer's national insurance and employer's pension costs.

One employee received total employee benefits (excluding employer pension costs) between £60,000 and £70,000 during the financial years 2022 (2021: Nil).

No trustee received any remuneration during the year and previous year.

Three trustees (2021: nil) were reimbursed for their travel and subsistence during the year totalling £372 (2021 : £Nil).

## 11. TANGIBLE FIXED ASSETS

| | Computer Equipment £ |
|---|---|
| **Cost** | |
| At 1 January 2022 | 5,402 |
| Additions | 3,058 |
| Disposals | (4,529) |
| At 31 December 2022 | 3,931 |
| **Depreciation** | |
| At 1 January 2022 | 4,182 |
| Charged in the year | 1,090 |
| Eliminated on disposals | (4,529) |
| At 31 December 2022 | 743 |
| **Net book value** | |
| 31 December 2022 | £3,188 |
| 31 December 2021 | £1,220 |

## 12. DEBTORS

| | 2022 £ | 2021 £ |
|---|---|---|
| Trade debtors | 3,500 | - |
| Prepayments and Accrued income | 17,428 | 39,899 |
| Other debtors | 8,251 | 5,221 |
| | £29,179 | £45,120 |

## 13. CREDITORS:

| Amounts falling due within one year | 2022<br>£ | 2021<br>£ |
|---|---|---|
| Trade Creditors | 2,386 | 22,115 |
| Amounts owed to group undertakings | 3,017 | 3,017 |
| Accruals | 13,524 | 17,965 |
| Taxation and Social Security | - | 17,847 |
| | £18,927 | £60,944 |

## 14. ANALYSIS OF NET ASSETS BETWEEN FUNDS

| **2022** | Unrestricted Funds<br>£ | Restricted Funds<br>£ | Total Funds<br>£ |
|---|---|---|---|
| Tangible fixed assets | 3,188 | - | 3,188 |
| Current assets | 137,587 | 140,793 | 278,380 |
| Current liabilities | (18,927) | - | (18,927) |
| Net assets at 31 December 2021 | £121,848 | £140.793 | £262,641 |

Comparative information for the previous financial year is as follows:

| **2021** | Unrestricted Funds<br>£ | Restricted Funds<br>£ | Total Funds<br>£ |
|---|---|---|---|
| Tangible fixed assets | 1,220 | - | 1,220 |
| Current assets | 144,539 | 139,800 | 284,339 |
| Current liabilities | (60,944) | - | (60,944) |
| Net assets at 31 December 2021 | £84,815 | £139,800 | £224,615 |

| **15. MOVEMENT IN FUNDS** | At 1 January 2022 | Income | Expenditure | Transfers | At 31 December 2022 |
|---|---|---|---|---|---|
| **2022** | | | | | |
| **Restricted funds:** | £ | £ | £ | £ | £ |
| Batley and Spen | 14,259 | - | 9,259 | - | 5,000 |
| Esmee Fairbairn | 15,744 | 40,000 | 49,399 | - | 6,345 |
| Spirit of 2012 | (2) | 260,348 | 231,866 | - | 28,480 |
| Innox Foundation | 10,681 | - | 10,681 | - | - |
| Astra Connection Coalition | 84,476 | 111,650 | 95,158 | - | 100,968 |
| Joseph Rowntree Reform Trust | 11,402 | - | 8,323 | (3,079) | - |
| DCMS | 3,240 | 20,998 | 24,238 | - | - |
| **Total restricted funds** | 139,800 | 432,996 | 428,924 | (3,079) | 140,793 |
| **Total unrestricted funds** | 84,815 | 196,519 | 162,565 | 3,079 | 121,848 |
| **Total funds** | £224,615 | £629,515 | £591,489 | £Nil | £262,641 |

**Transfers**

At the end of the project the Joseph Rowntree Reform Trust permitted the charity to use unspent funds for future general unrestricted purposes.

## 15. MOVEMENT IN FUNDS (cont'd)

Comparative information for the previous financial year is as follows:

| **2021** | At 1 January 2021 | Income | Expenditure | Transfers | At 31 December 2021 |
|---|---|---|---|---|---|
| **Restricted funds:** | £ | £ | £ | £ | £ |
| Batley and Spen | 45,968 | 59,125 | 90,834 | - | 14,259 |
| Esmee Fairbairn | 11,089 | 44,500 | 39,845 | - | 15,744 |
| Spirit of 2012 | 25,079 | 242,926 | 268,007 | - | (2) |
| Innox Foundation | - | 25,000 | 14,319 | - | 10,681 |
| Astra Connection Coalition | 42,900 | 119,700 | 78,124 | - | 84,476 |
| Joseph Rowntree Reform Trust | 6,352 | 5,750 | 700 | - | 11,402 |
| One Community | - | 10,000 | 10,000 | - | - |
| DCMS | - | 38,136 | 34,896 | - | 3,240 |
| **Total restricted funds** | 131,388 | 545,137 | 536,725 | - | 139,800 |
| **Total unrestricted funds** | 101,539 | 189,242 | 205,966 | - | 84,815 |
| **Total funds** | £232,927 | £734,379 | 742,691 | £Nil | £224,615 |

**Purpose of restricted funds**

Restricted funds are money earmarked for activities stipulated by the funder and used for the objectives set by them. These funds are detailed here:

| | |
|---|---|
| Batley and Spen | Community projects delivered in Batley and Spen |
| Esmee Fairbairn | More in Common network |
| Spirit of 2012 | Moment to Movement project |
| Innox Foundation | Youth loneliness projects |
| Astra Connection Coalition | Connection Coalition |
| Joseph Rowntree Reform Trust | Civility in Politics Awards |
| One Community | Covid response project to tackle loneliness |
| DCMS | Great Winter Get Together campaign |

## 16. COMMITMENTS UNDER OPERATING LEASES

The total future minimum lease payments due under non-cancellable operating leases are as follows:

| | 2022 Land and Buildings £ | 2021 Land and Buildings £ |
|---|---|---|
| Within one year | 1,708 | 6,847 |
| Within one to five years | - | - |
| | 1,708 | £6,847 |

## 17. COMPANY STATUS

The Jo Cox Foundation is a private company limited by guarantee and has no share capital. It is incorporated in Great Britain and registered in England and Wales. Each member is liable to contribute a sum not exceeding £1 in the event of the Company being wound up. The address of the registered office can be found in the Reference and Administration details on page 1.

## 18. TAXATION

The charitable company is exempt from corporation tax on its charitable activities.

## 19. CONTINGENT ASSETS

The amount of funding awarded to the charity but not recognised at 31 December 2022 was £390,077.

**THE JO COX FOUNDATION**

England & Wales - Charity number 1170836

# Accounts

THE JO COX FOUNDATION

# Trustees' Report and Accounts

## 2021








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# Rt Hon Jacqui Smith

## Chair of Trustees



**2021 was a year of challenge and change for The Jo Cox Foundation. We continued to feel the impact of the global pandemic, but we also continued to show the resilience and imagination in dealing with that and with continuing our work that Jo would have been proud of.**

In January, we said goodbye to Catherine Anderson, our CEO and welcomed Su Moore to the role to carry on her good work. As Su outlines below, we continue to make a difference with our programmes, increasing our range of partners with whom we collaborate, and working hard to improve how we measure the impact we have. I am grateful to Su and the staff team for their hard work, flexibility and innovation in such difficult circumstances.

In May, Jo's sister Kim Leadbeater decided to stand for election in Jo's parliamentary seat of Batley & Spen. This meant that she had to step back from her roles as the Director of our Yorkshire work and as the Ambassador for the Foundation. We are grateful for her work in both those roles.

We were keen to strengthen our Board of Trustees and, in particular, to ensure that we lived up to our aim to provide diverse leadership for the Foundation. After a thorough recruitment process, we were delighted to be able to welcome Amanda, Geethika and Nisha to the Board.

Our trustees continue to provide their considerable experience and wisdom to guide the Foundation and I'm very grateful to them.

The fifth anniversary of Jo's murder was marked by an outpouring of ongoing love and respect. We miss Jo, but continue to feel inspired by her values and her spirit. I was able to reflect on this when I had the honour of delivering the Jo Cox Memorial Lecture in June.

The murder of David Amess MP was a sad time for many – his family, his parliamentary colleagues and many who were moved and shocked by the event even if they didn't know him personally. The Foundation was vocal in responding to this tragic event and we pointed out how important it is that elected representatives are able to carry out their work safe from attack but also from the pernicious impact of abuse and incivility. This is an issue where we are determined to identify further action and to work to find solutions which protect individuals and our public life and democracy.

Thank you to all those who continue to support our work – financially, practically, vocally and by pushing us to do more in Jo's name. We are determined to live up to that challenge.

# Su Moore

## Chief Executive



**As Jacqui has reflected, 2021 was a year of change for The Jo Cox Foundation, and one during which I was delighted to be appointed CEO. As I said in my interview with the Trustees during the recruitment process, it is a genuine privilege to be able to work here.**

Despite the changes and the on-going backdrop of Covid, it was also a year in which we were still able to bring about change on issues that Jo was passionate about. With work principally focused on our Stronger Communities workstream, we raised awareness of loneliness with our Great Winter Get Together, brought people together with June's Great Get Together and deepened the offer and reach of the Connection Coalition.

It was also a year of learning and reflection for us. The team undertook anti-racism training, and we began to understand more about the journey we're on to be a fully inclusive organisation. In November we were delighted to be awarded the TPP Inclusive Recruitment grant. The judges noted our progress, whilst praising our acknowledgment of how far we have to go, and our desire to impact the diversity of the wider charity sector.

During the year we deepened our relationships with new and existing partners. I want to say a personal thanks to our funders, particularly Spirit of 2012, for their support and understanding as we deliver our moment to movement project against the backdrop of Covid. Thanks also to the new funders who supported us this year, including the Astra Foundation and the Innox Foundation, both supporting our work addressing loneliness.

Our collaboration with Whatsapp on a loneliness chatbot allowed us to explore new ways of supporting communities, and our work with Refugee Week for the Great Get Together was the beginning of what we hope will be an impactful and long-running partnership.

Building sustainable sources of funding is key for us as a relatively young Foundation. In the summer we launched our Friends of Jo Cox Foundation scheme, inviting people to become regular donors and support our work as we continue to make change on issues that Jo cared about.

We're here because people still care so deeply about Jo and feel empathy for the values by which she lived her life and the tributes that we were able to see on the memorial wall at the People's History Museum still echo today. As one Great Get Together organiser said "holding this event in the spirit of Jo Cox enabled many people to attend to celebrate what unites us rather than to grumble about any divisions.".

As I close, I'd like to say a huge thank you to the Foundation team. It wasn't always an easy year, but we've delivered genuine change, and we're stronger for it.

# About the Jo Cox Foundation

**Jo Cox was a passionate campaigner, activist and humanitarian; a proud Yorkshire lass and internationalist; and a devoted mum, daughter, sister, wife, friend and MP.**

The Jo Cox Foundation makes meaningful change on issues that Jo was passionate about. Like Jo, we believe that a kinder, fairer and more connected world is possible. Underpinning this belief is the understanding that we have more in common than that which divides us. As we work to make change, we follow Jo's example of collaborating with others and bringing people together to achieve more than we can alone.

We work in three areas. We nurture stronger communities, champion civility in politics and advocate for a fairer world.

We focus on making change led by the values by which Jo lived her life and are guided by the following principles:

**Ambitious:**
**This means:** We believe, like Jo, that there should be no 'too difficult to deal with' pile

**Collaborative**
**This means:** We believe that achieving real change requires us all to pool our strengths and exchange our skills and resources

**Empathetic**
**This means:** We believe that kindness and compassion are signs of strength, and that only by understanding others can we build relationships and bridge divides

# Stronger Communities

**In her first speech to Parliament, Jo Cox talked of her joy in representing the diverse community of Batley & Spen where she grew up: *"While we celebrate our diversity, what surprises me time and time again as I travel around the constituency is that we are far more united and have far more in common than that which divides us."***

Jo's commitment to bringing people together and her belief in focusing on our commonalities drives our work towards building strong compassionate communities where everyone has a sense of identity and belonging. With the on-going impacts of the pandemic, we continued to focus the majority of our work on our Stronger Communities workstream in 2021.

Emphasising the importance of social connection, advocating for on-going activity to alleviate loneliness and finding ways of bringing people together, despite social distancing, were key to our work.

## Moment to Movement

A key part of our Stronger Communities work is understanding how the spark of an event (for us the Great Get Together) can inspire people to engage year-round in their communities. Through the on-going development of our More in Common network, we support and empower organisers to form local groups that work to make their communities better places to live.



It has **completely changed my interaction with my local community.** The organisations I have volunteered with have come from the connections made via the Great Get Together events, I have made new friends and the involvement has empowered me to look at different ways I can positively impact my local community.

**Member of a More in Common group**

## The Great Get Together

For the second year, our June Great Get Together campaign was impacted by the Covid pandemic, with restrictions in England only allowing six people to meet inside, and 30 outside. Despite those restrictions, millions around the UK found ways to connect.

- 38% were first time organisers: over a 10% increase from 2020
- 73% said taking part made it easier to meet new people in their local areas
- 98% agreed that participating in the Great Get Together made them feel happier

The Great Get Together is about bringing communities together, and celebrating what we have in common. Every year we do something to honour Jo Cox and because of Covid restrictions, it had to be outside. There could only be 30 guests so it made sense for it to be held at Howell Road Allotments because that place celebrates what we have in common. **The allotment holders are all from different backgrounds and walks of life and they come together because of their love for fruit and vegetables.**

**Beverley, a Great Get Together organiser in Wolverhampton**



## More in Common Network

Our More in Common Network brings together community-led volunteer groups around the country who work year-round to show that, as Jo said, we have more in common than that which divides us. After establishing the foundations of the Network in 2020, 2021 was a year of building connections between our existing groups, and inspiring new groups to form. During the year we:

- Launched our series of training sessions for community organisers: the Common Room. Sessions were open to anyone, and brought people together to discuss topics including intergenerational connection and building cohesion.
- With the on-going pandemic making in-person events challenging, and volunteer burnout being a real issue, connecting members so they could learn and share from each other was vital. We formed informal spaces where members could connect, share difficulties, and empower each other!
- After so many Zoom calls, it was amazing to be able to bring groups together in person for a learning and networking event at the People's History Museum in Manchester in September.

Near to the end of 2021 we spoke with our More In Common groups and it was clear the pandemic had impacted their activities. However, the determination to continue their work in the future remained.



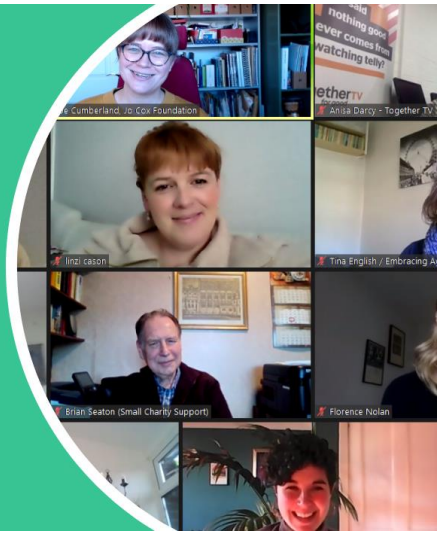
## The Connection Coalition

Founded at the beginning of the pandemic, anticipating that the nation was at risk of a crisis of disconnection, the Connection Coalition rapidly became a strong network of over 800 organisations, all hoping to work collectively to ensure that communities and the country emerges from Covid-19 ready to build and strengthen social relationships.

Intended initially to be a six-month project, at the beginning of 2021 we conducted research with members to decide if there was a need to continue the Coalition. Based on this member feedback, we decided to continue and evolve the project, recruiting a dedicated Manager who focused on ways of bringing the members together and creating connections within the Coalition.

Over the summer we set up a community of practice with a group of members to explore the question: How can we keep putting relationships at the heart of what we do? Through initiatives such as this, along with the monthly informal get togethers we run for members, our work on the Coalition provides spaces to "support the supporters", giving members a safe space to share challenges and experiences with others who understand. In turn this has increased collaboration and resilience within the sector of those working to build connections and relationships within our communities.

> I personally really enjoyed being able to speak to other people working and supporting their communities and **actually take some time out to smile about things as we connect.** So thank you for that because I hear so many of us say we feel like we have lost ourselves a little at the moment.
>
> **Member of the community of practice**



## Our work in Yorkshire

An on-going vital part of our work is that done by our team in Batley and Spen, Jo's constituency. As a central and well-connected local organisation, we continued to work with Kirklees Council as an anchor organisation for the Covid response, acting as a hub to coordinate support for those in the community who needed it most. We also coordinated projects that focused on mental health awareness, and on digital inclusion.

As well as supporting the local community, we also worked with them to create, develop and expand projects. In December, with a community development workshop, we launched a programme focused on understanding concepts of belonging in the local area, that we will develop into 2022. We also continued the Community Makes Us project that we launched in 2020, which brought together 46 local people in Batley and Spen to share their experiences of the pandemic, lockdowns and to think of ways they can support each other and the wider community. By recruiting participants from across all sections of the community, the project promoted unity, empathy and cohesion.



> This group, they allowed me and I think that's the big word for me. **It allowed me to have a voice, it allowed me to just be there and not be judged and people cared about me and listening to them I cared about them.** And over the weeks that we've been discussing things in this project, we've become quite close to each other and become friends.
>
> **Julie, a Community Makes Us participant**

# Better Public Life

Jo's murder in 2016 was a turning point in the recognition of the need for better politics. She was passionate about achieving a 50:50 Parliament and we know that the issue of abuse and intimidation directly impacts women's participation. We seek to find solutions to this problem, which discourages so many from entering political life and particularly impacts diverse representation.

The problem of abuse and intimidation of elected politicians is worsening in this country and becoming an increasing threat to democracy. The tragic murder of Sir David Amess

in October threw the on-going problem into stark relief, and has added momentum to our work to find solutions to this complex issue over the coming years.

Given our convening power, and the success of the Jo Cox Commission on Loneliness, it is our intention to form a high-profile commission, bringing together key figures from a range of sectors - including social media companies, the police, local government - to jointly recommend solutions to the issue.

In 2021 our key focus was on beginning the planning for the commission and fundraising to enable us to make a start on the work. We have also worked hard on raising the profile of the issue and championing solutions, with initiatives including:

- Raising awareness of abuse towards women in politics. To mark 16 Days of Activism Against Gender Based Violence in November, we highlighted the scale and human impact of this problem to our online audiences by sharing real testimonies from women across parties and levels of UK politics, who have been subject to harrassment, abuse, and rape and death threats. This content received support from current and former MPs and councillors.
- Championing our Civility Pledge. In the lead up to the May 2021 elections, we once again ran the Civility Pledge campaign which received support from prospective local councillors and directly-elected Mayors who publicly shared their commitment to upholding the dignity of their opponents. The Civility Pledge is based on the wording of the Joint Statement on Conduct for Political Parties, which we launched at the end of 2020, and highlights how those running for election can be part of the solution by committing to a respectful campaign.



# Fairer World

Jo Cox was a true humanitarian and had a 20-year career in international aid and development, working on campaigns around the world from Darfur to Afghanistan. Through our work on building a fairer world, we are committed to adding value wherever we can on the international issues that Jo cared so much about. Through this work, we celebrate Jo's internationalism, her career in international campaigning and development aid, and her compassion towards the world's most vulnerable.

We continue to advocate for the government to restore the 0.7% aid budget as soon as possible. Our Chair Jacqui Smith highlighted this during the Jo Cox Memorial Lecture in June and we shared content raising awareness of the importance of the aid budget with our online audiences.

The key focus of our international work this year has been the Jo Cox Memorial Grants, a £10m grant pot via the FCDO, administered by Mannion Daniels. During the year, we've been delighted that focus has been placed on bringing grantees together to learn and share, embracing the spirit of collaboration that was so important to Jo.



# Priorities for 2022

In 2022, we will turn our minds to updating our existing three year strategy, with particular consideration for what we have learnt in the previous years, the impact of the pandemic on communities around the UK, and the increasing urgency of addressing the problem of abuse and intimidation in UK politics. We will continue to push for positive change on issues that were important to Jo, and to spread her 'more in common' message.

Key areas of focus will include:

- Advocating for the renewal of the Jo Cox Memorial Grants, to enable people across the world, especially women, to continue to benefit from Jo's humanitarian legacy.
- Planning and launching the Jo Cox Commission on Civility, committed to finding solutions to the problem of abuse and intimidation in political life.
- Further investigating and understanding how the spark of the Great Get Together can lead to on-going year-round community engagement, and continuing to build our network of brilliant More in Common groups.
- Continuing our work in Batley and Spen, Jo's constituency, exploring ideas of belonging within the community.
- Understanding the role of the Connection Coalition in a post-Covid world, and continuing to support organisations to come together to prioritise connection, and tackle social isolation.
- Boosting our fundraising work, through challenge events and on-going promotion of our Friends scheme for regular donors.
- Continuing on our inclusivity journey, ensuring that The Jo Cox Foundation is a truly welcoming place to work, and that our programmes place diversity and inclusion at their heart.

# People

The Trustees would like to thank everyone who supported our work in 2021, particularly our dedicated and hard-working staff team. Without them, we couldn't achieve any of our work on issues that Jo was passionate about.

## 2021 Staff Team

- Catherine Anderson
- Clare Black
- Dave Hawksworth
- Ella Turner
- Eleanor Harrison
- Emily Danby
- Hafeezah Soni
- Hannah Brown
- Jess Jackson
- Jessica Leach
- Jo Atkins-Potts
- Josh Westerling
- Kim Leadbeater
- Kira Charlton
- Lance Price
- Marianne Quinn
- Meena Jeewa
- Nathan Stilwell
- Parveen Butt
- Su Moore
- Will Fletcher
- Zoe Cumberland

# Funders and Partners

## Charitable trusts and foundations

- The Astra Foundation
- Batley and Birstall Community Fund
- Esmée Fairbairn
- Innox Foundation
- Joseph Rowntree Reform Trust
- One Community Foundation
- Spirit of 2012

## Corporate donors

- Decathlon
- Fox's Biscuits
- Jaybe
- Meta
- Neue Schule
- PPG Industries
- XYZ Law

## Government grants

- DCMS
- The Kickstart Scheme
- Kirklees Council

## Community events

Our thanks to everyone who participated in our two main community events in 2021: the Jo Cox Way and Run for Jo.

## Individual donors

We continue to receive support from many individuals, including those who choose to make regular donations to us as Friends of the Jo Cox Foundation. We would like to thank all of those who donated to us in 2021.

In particular we would like to thank Iain Dale for donating proceeds from ticket sales for *For The Many Live*, and the Right Hon Penny Mordaunt MP and Chris Lewis for donating proceeds from their book *Greater: Britain After the Storm*.

# Financial review

**Funds raised**

Total income for the year was £734,379 (2020: £749,680);of which unrestricted income was £189,242 (2020: £215,657) and restricted income was £545,137 (2020: £534,023)

**Expenditure**

Total expenditure was £742,691 (2020: £649,304); of which unrestricted expenditure was £205,966 (2020: £194,965) and restricted expenditure was £536,725 (2020: £454,339).

This resulted in a deficit for the year of £8,312 (2020: surplus of £100,376).

## Reserves policy

JCF's reserves policy has been devised by analysing the charity's main financial obligations now, and in the future, the cost of reshaping the charity and the scale of risk to voluntary income to calculate a target sum of unrestricted funds to be held in reserve. Such a sum should be sufficient to ensure the continued operation of the charity in the medium term in the event of a drop in generated income.

The reserves policy contains a framework for regularly reviewing the free reserves level, with the frequency of review determined by the amount of free reserves held. This is to ensure that the Trustees continue to monitor and manage reserves effectively.

The target for 31 December 2021 was set at £151,394 in free reserves. At 31 December 2021, JCF held £84,815 in free reserves (2020: £101,539)

# Structure, governance and management

## Governing document

The Jo Cox Foundation is a charitable company, limited by guarantee, incorporated on 23 September 2016, and registered as a charity on 19 December 2016.

The company was established under a Memorandum and Articles of Association, which established the objects and powers of the charitable company, as amended by special resolution on 16 January 2018.

## Governance

The charity is governed by its Trustees. The Trustees also act as the members of the charity and its corporate Directors for the purposes of the Companies Act 2006. The Articles of Association outline the powers, responsibilities and decision-making of the Trustees.

## Recruitment and appointment of Trustees

The process for appointing Trustees to the Board of The Jo Cox Foundation is outlined in the Articles of Association. The minimum number of Trustees is three.

During this period we recruited additional Trustees. Applicants were invited to apply via an open recruitment. Applications were then shortlisted by a panel of two Trustees and the CEO, who then conducted interviews with shortlisted candidates. Three candidates were then recommended to the wider Board for approval.

## Trustee induction and training

Trustees are provided with a clear role description, outlining their statutory and additional responsibilities. New Trustees are provided with a thorough induction, including spending time with the CEO and Head of Ops and Finance. All Trustees are encouraged to take up relevant training and development to fulfil their role and responsibilities to the charity.

## Organisational structure and decision making

The Foundation has a Board of Trustees, with a minimum number of three Trustees. The Board of Trustees appoint a Chair of Trustees and Treasurer from amongst themselves. The Trustees are responsible for the strategic direction of the charity and oversight of its work and finances.

The Trustees delegate day-to-day responsibility for the provision of services to the Chief Executive Officer. The Chief Executive Officer is responsible for ensuring the secure financial management and administration of the charity. Effective management and supervision of the staff team is the responsibility of the Chief Executive Officer.

## Remuneration of key personnel

The remuneration of the charity's key management personnel, the Chief Executive Officer, is set by the Board of Trustees, taking into account the charity's financial position and the amount paid for comparable roles in comparable organisations.

## Risk assessment

The Foundation regularly undertakes a detailed review and assessment of risks, financial and non-financial, to which it is exposed in its current activities. These have been developed into a formal Risk Management process.

The Trustees have considered a summary of all major risks and have ensured that effective systems and controls exist to reduce internal risks and respond swiftly to external risks and minimise their impact.

Risks are monitored continually by the management and reviewed regularly by the Trustees unless there are issues that need the Trustee's immediate attention.

The principal risk areas identified by the trustees are:

- Reputational risk and perception of political bias: to mitigate this we communicate regularly with supporters and beneficiaries and have robust crisis communications procedures.
- Long-term income: we continue to work to diversify our income streams and secure future funding, with a particular focus on the period from mid 2023 onwards.
- Staff retention: in 2021 we have had a high staff turnover. In 2022 we will have a focus on staff wellbeing and creating a sense of belonging for all members of the team.

# Reference and administrative details

| | |
|---|---|
| **Charity Name** | The Jo Cox Foundation |
| **Charity Number** | 1170836 |
| **Company Number** | 10392667 (England and Wales) |
| **Registered Office** | Living Space, 1 Coral Street, London, SE1 7BE |

**Chief Executive Officer**
Catherine Anderson (until February 2021)
Su Moore (from February 2021)

**Trustees and Directors**
The Trustees who served during the year, or who served at the time this report and financial statements were approved, who were also directors of the company, were as follows:

Amanda Chetwynd-Cowieson (appointed 8 February 2022)
Eloise Todd
Geethika Jayatilaka (appointed 1 April 2022)
Rt Hon Jacqui Smith
Jane Brady
Jennie Richmond
Nisha Jani (appointed 8 February 2022)
Rosamund Blomfield-Smith
Samantha Vickers
Steve Morris

**Bankers**

Metro Bank Plc
1 Southampton Row
London
WC1B 5HA

Lloyds Bank Plc
Po Box 1000
BX1 1LT

**Independent Examiner**
Stephen Jones, FCA
Myrus Smith, Chartered Accountants
Norman House, 8 Burnell Road, Sutton, Surrey, SM1 4BW

# Statement of Trustees' and Directors' responsibilities

The Trustees, who are also Directors of The Jo Cox Foundation for the purposes of company law, are responsible for preparing the Directors' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The Trustees confirm that they have complied with the duty in section 17(5) of the Charities Act 2011 to have due regard to the Charity Commission's general guidance on public benefit.

Company law requires the Directors to prepare financial statements for each financial year. Under company law the trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of the affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the Directors are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities' Statement of Recommended Practice 2019 (FRS102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK accounting standards have been followed, subject to any material departures being disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Directors are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and which enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

**Signed on behalf of the Trustees:**



Rt Hon Jacqui Smith, Chair of Trustees

29 September 2022

# Report of the Independent Examiner

**Independent Examiner's Report to the Trustees of The Jo Cox Foundation**

I report to the charity trustees on my examination of the accounts of the company for the year ended 31 December 2021 which are set out on pages 22 to 35.

**Responsibilities and basis of report**

As the charity trustees of the company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your company's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011Act'). In carrying out my examination I have followed the directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

**Independent examiner's statement**

Since the company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of The Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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.



Stephen Jones, FCA

29 September 2022

For and on behalf of Myrus Smith
Chartered Accountants
Norman House, 8 Burnell Road, Sutton, Surrey, SM1 4BW

# Statement of financial activities

(Incorporating Income and Expenditure Account)

FOR THE YEAR ENDED 31 DECEMBER 2021

| | Notes | Unrestricted Funds £ | Restricted Funds £ | 2021 Total £ | 2020 Total £ |
|---|---|---|---|---|---|
| **Income** | | | | | |
| Donations and legacies | 2 | 189,242 | - | 189,242 | 212,179 |
| Charitable activities | 3 | - | 545,137 | 545,137 | 534,023 |
| Other trading activities | 4 | - | - | - | 3,478 |
| **Total** | | 189,242 | 545,137 | 734,379 | 749,680 |
| **Expenditure** | | | | | |
| Raising funds | 5 | 35,725 | - | 35,725 | - |
| Charitable activities | 6 | 170,241 | 536,725 | 706,966 | 649,304 |
| **Total** | | 205,966 | 536,725 | 742,691 | 649,304 |
| **Net income / (expenditure) for the year** | | (16,724) | 8,412 | (8,312) | 100,376 |
| Transfer between funds | | - | - | - | - |
| **Net movement in funds** | | (16,724) | 8,412 | (8,312) | 100,376 |
| Total funds as at 1 January 2020 | 15 | 101,539 | 131,388 | 232,927 | 132,551 |
| **Total funds at 31 December 2021** | | £84,815 | £139,800 | £224,615 | £232,927 |

All income and expenditure derives from continuing activities.

The statement of financial activities includes all gains and losses recognised during the year.

The notes on pages 25 to 35 form part of the financial statements.

# Balance sheet

AS AT 31 DECEMBER 2021

| | Notes | 2021 £ | 2021 £ | 2020 £ | 2020 £ |
|---|---|---|---|---|---|
| **Fixed Assets** | | | | | |
| Tangible assets | 11 | | 1,220 | | 348 |
| **Current Assets** | | | | | |
| Debtors | 12 | 45,120 | | 8,443 | |
| Cash at bank and in hand | | 239,219 | | 233,499 | |
| | | 284,339 | | 241,942 | |
| **Creditors**: Amounts falling due within one year | 13 | 60,944 | | 9,363 | |
| **Net Current Assets** | | | 223,395 | | 232,579 |
| **Net Assets** | 14 | | £224,615 | | £232,927 |
| **Funds** | | | | | |
| Unrestricted | 15 | | 84,815 | | 101,539 |
| Restricted | 15 | | 139,800 | | 131,388 |
| | | | £224,615 | | £232,927 |

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 December 2021.

The trustees have not required the company to obtain an audit of its financial statements for the year ended 31 December 2021 in accordance with Section 476 of the Companies Act 2006.

The trustees acknowledge their responsibilities for:

a) ensuring that the charitable company keeps accounting records that comply with Sections 386 and 387 of the Companies Act 2006 and

b) preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

These financial statements have been prepared in accordance with the provisions applicable to charitable companies subject to the small companies regime.

The financial statements were approved and authorised for issue by the Trustees on 29 September 2022 and signed on its behalf by:

Rt Hon J J Smith
Trustee

The notes on pages 25 to 35 form part of the financial statements.

# Statement of cash flows

FOR THE YEAR ENDED 31 DECEMBER 2021

| | Notes | 2021 | 2020 |
|---|---|---|---|
| | | £ | £ |
| **Cash flows from operating activities** | | | |
| Net movement in funds per statement of financial activities | | (8,312) | 100,376 |
| Adjustments for: | | | |
| Depreciation charges | 11 | - | 609 |
| (Increase) / decrease in debtors | | (36,677) | 1,791 |
| (Increase) / increase in creditors | | 51,582 | (9,788) |
| ***Net cash provided by / (used in) operating activities*** | | £6,593 | 92,988 |
| **Cash flows from investing activities** | | | |
| Purchase of tangible fixed assets | | (873) | - |
| ***Net cash provided by / (used in) investing activities*** | | (873) | - |
| **Change in cash at bank in the year** | | 5,720 | 92,988 |
| Cash at bank brought forward | | 233,499 | 140,511 |
| **Cash at bank carried forward** | | £239,219 | £233,499 |

The notes on pages 25 to 35 form part of the financial statements.

# Notes to the financial statements

FOR THE YEAR ENDED 31 DECEMBER 2021

## 1. ACCOUNTING POLICIES

### Basis of preparation and assessment of going concern

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention. The financial statements are presented in sterling which is the functional currency of the charity.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

The trustees consider that there are no material uncertainties about the charity's ability to continue as a going concern.

### Income recognition

Items of income are recognised in the financial statements when all of the following criteria are met:

- The charity has entitlement to the funds;
- any performance conditions have been met or are fully within the control of the charity;
- there is sufficient certainty that receipt of the income is considered probable; and
- the amount can be measured reliably.

## 1. ACCOUNTING POLICIES (cont'd)

### Expenditure recognition

Expenditure is recognised once there is a legal or constructive obligation to make payment to a third party, it is probable that settlement will be required and the amount can be measured reliably.

Expenditure includes those costs of a direct nature which can be allocated to a specific activity. It also includes indirect costs, including governance costs that do not relate to a specific activity but are necessary to support those activities. Support costs are apportioned to each activity on the basis of staff time or on a basis which is designed to reflect the use of the resources.

### Fund accounting

Unrestricted general funds are freely available for use in furtherance of the objects of the charity and which have not been designated for particular purposes.

Designated funds are unrestricted funds set aside by the trustees for particular purposes.

Restricted funds are funds which can only be used in accordance with specific restrictions imposed by the donor or which have been raised for a particular purpose.

### Tangible fixed assets

All expenditure on capital items costing less than £1,000 is written off in the year of purchase.

### Leases

Operating lease rentals are charged to the Statement of Financial Activities on a straight line basis over the period of the lease.

### Pensions

The charity operates a defined contribution pension scheme. Contributions payable under the scheme are charged to the Statement of Financial Activities in the year to which they relate.

### Debtors and creditors

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in the Statement of Financial Activities.

| **2. DONATIONS AND LEGACIES** | Unrestricted funds £ | Total 2021 £ | Total 2020 £ |
|---|---|---|---|
| Donations | £189,242 | £189,242 | £212,179 |

All of the £212,179 recognised in 2020 related to unrestricted funds.

| **3. INCOME FROM CHARITABLE ACTIVITIES** | Restricted funds £ | Total 2021 £ | Total 2020 £ |
|---|---|---|---|
| Grants and other income | £545,137 | £545,137 | £534,023 |

All of the £534,023 recognised in 2020 related to restricted funds.

| **4. OTHER TRADING ACTIVITIES** | Unrestricted funds £ | Restricted funds £ | Total 2021 £ | Total 2020 £ |
|---|---|---|---|---|
| Trading Commission | £Nil | £Nil | £Nil | £3,478 |

All of the £3,478 recognised in 2020 related to unrestricted funds.

| **5. COST OF RAISING FUNDS** | Direct costs £ | Support costs £ | Total 2021 £ | Total 2020 £ |
|---|---|---|---|---|
| Consultancy | 11,400 | - | 11,400 | - |
| Fundraising events and materials | 24,325 | - | 24,325 | - |
| | £35,725 | £Nil | £35,725 | £Nil |

| **6. EXPENDITURE ON CHARITABLE ACTIVITIES** | Direct costs | Support costs | Total 2021 | Total 2020 |
|---|---|---|---|---|
| | £674,535 | £32,431 | £706,966 | £649,304 |

Of the £649,304 expenditure recognised in 2020, £194,965 was charged to unrestricted funds and £454,339 was charged to restricted funds.

## 7. ANALYSIS OF DIRECT COSTS

| | Total 2021 £ | Total 2020 £ |
|---|---|---|
| Staff salaries including payroll costs | 411,842 | 376,992 |
| Miscellaneous HR costs | 1,068 | - |
| Recruitment and training | 36,840 | - |
| Travel and subsistence | 1,268 | 1,040 |
| Consultancy | 45,995 | 96,023 |
| Marketing and advertising | 10,852 | - |
| Websites and database | 18,514 | - |
| Project costs (campaigns) | 111,837 | 128,347 |
| Monitoring and Evaluation | 36,319 | 21,875 |
| Depreciation | - | 610 |
| Sundries | - | 404 |
| | £674,535 | £625,291 |

## 8. ANALYSIS OF SUPPORT COSTS

| | Total 2021 £ | Total 2020 £ |
|---|---|---|
| IT costs | 4,245 | - |
| Bank charges | 659 | 602 |
| Premises and related costs | 13,752 | 6,270 |
| Governance costs (see note 10) | 10,720 | 9,363 |
| Stationery and postage | 2,759 | 909 |
| Telephone and internet | 296 | 6,028 |
| Legal fees | - | 841 |
| | £32,431 | £24,013 |

## 9. GOVERNANCE COSTS

| | 2021 | 2020 |
|---|---|---|
| | £ | £ |
| Independent Examination fees | 8,892 | 9,363 |
| Insurance | 1,828 | - |
| | £10,720 | £9,363 |

## 10. STAFF COSTS

| | 2021 | 2020 |
|---|---|---|
| | £ | £ |
| Wages and salaries | 366,933 | 337,091 |
| Social security costs | 38,057 | 31,942 |
| Pension costs | 6,852 | 7,959 |
| | 411,842 | £376,992 |

The average number of employees during the year was as follows:

| Particulars of employees: | 2021 | 2020 |
|---|---|---|
| | No. | No. |
| Chief Executive | 1 | 1 |
| Administrative staff | 4 | 3 |
| Charitable activities | 7 | 7 |
| | 12 | 11 |

The members of the Board received no remuneration or reimbursement of expenses (2020: £Nil).

Total employee benefits received by key management, including employer's pension costs, amounted to £72,867 (2020: £63,564).

Under FRS 102, employee benefits include gross salary, benefits in kind, employer's national insurance and employer's pension costs.

No employee received total employee benefits (excluding employer pension costs) of more than £60,000 during the financial years 2021 and 2020.

## 11. TANGIBLE FIXED ASSETS

| | Computer Equipment £ |
|---|---|
| **Cost** | |
| At 1 January 2021 | 4,529 |
| Additions | 873 |
| At 31 December 2021 | 5,402 |
| **Depreciation** | |
| At 1 January 2021 | 4,182 |
| Charged in the year | - |
| At 31 December 2021 | 4,182 |
| **Net book value** | |
| 31 December 2021 | £1,220 |
| 31 December 2020 | £347 |

## 12. DEBTORS

| | 2021 £ | 2020 £ |
|---|---|---|
| Other debtors | 5,221 | 3,822 |
| Prepayments and Accrued income | 39,899 | 4,621 |
| | £45,120 | £8,443 |

## 13. CREDITORS:

| Amounts falling due within one year | 2021<br>£ | 2020<br>£ |
|---|---|---|
| Trade Creditors | 22,115 | - |
| Other Creditors: | | |
| Amounts owed to group undertakings | 3,017 | 3,017 |
| Accruals | 17,965 | 5,382 |
| Taxation and Social Security | 17,847 | 964 |
| | £60,944 | £9,363 |

## 14. ANALYSIS OF NET ASSETS BETWEEN FUNDS

| **2021** | Unrestricted Funds<br>£ | Restricted Funds<br>£ | Total Funds<br>£ |
|---|---|---|---|
| Tangible fixed assets | 1,220 | - | 1,220 |
| Current assets | 144,539 | 139,800 | 284,339 |
| Current liabilities | (60,944) | - | (60,944) |
| Net assets at 31 December 2021 | £84,815 | £139,800 | £224,615 |

Comparative information for the previous financial year is as follows:

| **2020** | Unrestricted Funds<br>£ | Restricted Funds<br>£ | Total Funds<br>£ |
|---|---|---|---|
| Tangible fixed assets | 348 | - | 348 |
| Current assets | 110,554 | 131,388 | 241,942 |
| Current liabilities | (9,363) | - | (9,363) |
| Net assets at 31 December 2020 | £101,539 | £131,388 | £232,927 |

**15. MOVEMENT IN FUNDS**

| **2021** | At 1 January 2020 | Income | Expenditure | Transfers | At 31 December 2021 |
|---|---|---|---|---|---|
| **Restricted funds:** | £ | £ | £ | £ | £ |
| Batley and Spen | 45,968 | 59,125 | 90,834 | - | 14,259 |
| Esmee Fairbairn | 11,089 | 44,500 | 39,845 | - | 15,744 |
| Spirit of 2012 | 25,079 | 242,926 | 268,007 | - | (2) |
| Innox Foundation | - | 25,000 | 14,319 | - | 10,681 |
| Astra Connection Coalition | 42,900 | 119,700 | 78,124 | - | 84,476 |
| Joseph Rowntree Reform Trust | 6,352 | 5,750 | 700 | - | 11,402 |
| One Community | - | 10,000 | 10,000 | - | - |
| DCMS | - | 38,136 | 34,896 | - | 3,240 |
| **Total restricted funds** | 131,388 | 545,137 | 536,725 | - | 139,800 |
| **Total unrestricted funds** | 101,539 | 189,242 | 205,966 | - | 84,815 |
| **Total funds** | £232,927 | £734,379 | 742,691 | £Nil | £224,615 |

## 15. MOVEMENT IN FUNDS (cont'd)

Comparative information for the previous financial year is as follows:

| **2020** | At 1 January 2020 | Income | Expenditure | Transfers | At 31 December 2020 |
|---|---|---|---|---|---|
| **Restricted funds:** | £ | £ | £ | £ | £ |
| Batley and Spen | 77,727 | 112,656 | (57,836) | (86,579) | 45,968 |
| Great Get Together | - | 10,321 | (29,784) | 19,463 | - |
| Esmee Fairbairn | 40,000 | 20,000 | (48,911) | - | 11,089 |
| Spirit of 2012 | 217 | 296,296 | (271,271) | (163) | 25,079 |
| GEO | 2,000 | - | (2,000) | - | - |
| Astra Connection Coalition | - | 51,000 | (8,100) | - | 42,900 |
| Joseph Rowntree Reform Trust | - | 13,750 | (7,398) | - | 6,352 |
| NESTA Connection Coalition | - | 30,000 | (29,039) | (961) | - |
| **Total restricted funds** | 119,944 | 534,023 | (454,339) | (68,240) | 131,388 |
| **Total unrestricted funds** | 12,607 | 215,657 | 194,965 | 68,240 | 101,539 |
| **Total funds** | £132,551 | £749,680 | £649,304 | £Nil | £232,927 |

**Purpose of restricted funds**

Restricted funds are money earmarked for activities stipulated by the funder and used for the objectives set by them. These funds are detailed here:

| | |
|---|---|
| Batley and Spen | Community projects delivered in Batley and Spen |
| Great Get Together | Great Get Together campaign |
| Esmee Fairbairn | More in Common network |
| Spirit of 2012 | Moment to Movement project |
| GEO | Project to inspire women to enter public life |
| Innox Foundation | Youth loneliness projects |
| Astra Connection Coalition | Connection Coalition |
| Joseph Rowntree Reform Trust | Civility in Politics Awards |
| One Community | Covid response project to tackle loneliness |
| DCMS | Great Winter Get Together campaign |

## 16. COMMITMENTS UNDER OPERATING LEASES

The total future minimum lease payments due under non-cancellable operating leases are as follows:

| | 2021 Land and Buildings £ | 2020 Land and Buildings £ |
|---|---|---|
| Within one year | 6,847 | 10,286 |
| Within one to five years | - | 1,147 |
| | £6,847 | £11,433 |

## 17. COMPANY STATUS

The Jo Cox Foundation is a private company limited by guarantee and has no share capital. It is incorporated in Great Britain and registered in England and Wales. Each member is liable to contribute a sum not exceeding £1 in the event of the Company being wound up. The address of the registered office can be found in the Reference and Administration details on page 1.

## 18. TAXATION

The charitable company is exempt from corporation tax on its charitable activities.

**THE JO COX FOUNDATION**

England & Wales - Charity number 1170836

# Accounts

THE JO COX FOUNDATION

# Trustees' Report and Accounts 2020







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FOREWORD

# JACQUI SMITH
# CHAIR



**Jo would have been proud of the way her Foundation has risen to the challenge of 2020 and I am proud of our staff team, Board and partners.**

During the last year, we have said goodbye to our CEO Catherine Anderson and thanked her for the work that she has done in growing our staff, income and influence. We have welcomed Su Moore as our new CEO and, as you will see from below, she is already building on the great progress made by her predecessor. We are proud that our Ambassador, and Jo's sister, Kim Leadbeater was elected to parliament in the Batley and Spen By-election. This means that she will no longer be working for the Foundation, but we know she remains a friend and strong supporter.

Sadly, the division sown by some during the By-election identified that our work to build on Jo's vision that we have more in common than that which divides us remains both topical and urgent. I am, therefore, proud that during such a difficult time when we were forced apart by the pandemic, we still ran such a successful Great Get Together. This year we will redouble our efforts to develop this work into an all year round movement.

As we move out of the pandemic, we will also reinvigorate our work to ensure a better public life standing up to abuse and hate and working with others to develop the next stages of our campaign. A strong and inclusive public life and democracy needs us all to recognise the humanity of others however strongly we may disagree with them. I want people to be encouraged to stand for election and speak up, not to be discouraged or scared off.

Where necessary, we will speak up on the issues Jo would have cared about. For example, we are proud of the work that the Jo Cox Memorial Grants are supporting across the world and we will continue to argue for more international aid despite changes to government machinery and commitments.

We were all affected by the murder of George Floyd last year and we realise that we have more work to do to ensure that the Foundation is a strong anti racist organisation in our campaigning and our representation from the Board downwards. We will recruit new Trustees with a particular focus on improving our Board diversity and will use our campaigning to strengthen equality and representation more widely.

I would like to thank my fellow Board members for their wisdom and hard work this year and our staff for their energy, challenge and impact. Despite everything we have faced, we are going from strength to strength and I am looking forward to the next stages of our development.

— Jacqui Smith



# SU MOORE
## CEO



**2020 was a challenging year for everyone, and I'm extremely proud of how the Jo Cox Foundation team came together to deliver incredibly impactful work during the most difficult of times. During times when physical distancing was a legal requirement, we still managed to find ways to bring people together, and to find hope and opportunity during the darkest times.**

To deliver a Great Get Together campaign when getting together was prohibited was challenging, to say the least, but we saw our incredible organisers rise to the challenge, with acts of kindness, and imaginative socially distanced events, including gardening and craft - and even Zumba and a wedding!

Our growing More in Common network also came into its own during the pandemic, with members not only supporting their own communities, but also supporting each other to continue to deliver vital support throughout the year. We were delighted to welcome new groups in Halton, Llanwitt Major and Birmingham. The foundations of the network were fully established during 2020, and 2021 will see a time of expansion, with a new brand and website.

The early days of lockdown in March 2020 were a time of fear and confusion for many, but, inspired by Jo Cox's belief that we should concentrate on what we can do, rather than what we can't, conversations began with partners that led to the formation of the Connection Coalition. Revisiting the early planning documents for the Coalition shows that we originally planned it to last for three to six months, which at the time we optimistically thought would be the length of the pandemic! Even after that six month original lifespan, though, the Coalition continued to go from strength to strength, and by the end of the year number 800 members, all inspired to prioritise connection and tackle loneliness. A second phase for the Coalition in 2021 will see us support members to build connections with each other, to learn from each other and grow stronger together.

Throughout the year, the urgent need for our Stronger Communities work was clear, so we made the strategic decision to place less of a focus on our Public World and Fairer World work. We still made good progress, though, with the launch of the Joint Statement on Political Standards of Party Members which has now been signed by many of the major political parties. In our Fairer World work, we have continued to champion the stories of the inspiring recipients of the Jo Cox Memorial Grants. We plan to increase our work in these areas, particular our Public Life work, in 2021.

As well as the Covid pandemic, other events rocked the world in 2020. The murder of George Floyd in May caused many to call for change, and at the Jo Cox Foundation we began a journey for us to become a truly anti-racist organisation. We have much more to do, and developing a truly inclusive team with a clear anti-racist vision will be a key focus for 2021.

**I'd like to thank the whole Jo Cox Foundation team for their work in 2020. They delivered truly impressive work during such difficult times. Thanks also to our partners, especially Spirit of 2012, for their flexibility and support.**



# OUR VISION AND MISSION

**The Jo Cox Foundation was established in 2016 by the friends and family of the late Jo Cox MP. The Foundation exists to build a positive legacy for Jo and to create something positive from the tragedy that was her murder.**

The objects of the Charity are for the public benefit to further such purposes as are exclusively charitable in accordance with the laws of England and Wales.

## Our Vision

Our vision is for a kinder, more compassionate society where every individual has a sense of belonging and where we recognise that we have more in common than that which divides us.

## Our Mission

The Jo Cox Foundation inspires and galvanises positive change at local, national and international levels. We do this by partnering with visionary individuals and organisations who share our commitment to the fairer, kinder world that Jo dedicated her life to building.

### Stronger Communities



**Locally** we work to create compassionate, well connected communities where everyone has a sense of identity and belonging, by bringing people together through The Great Get Together campaign and the national More in Common Network.

### A Better Public Life



**Nationally** we work to build a better public life through tackling abuse and intimidation, encouraging cross-party work on important issues, and inspiring the next generation of women and young people.

### A Fairer World



**Internationally** we support organisations and initiatives which champion the humanitarian causes Jo cared about.

# OUR VALUES

**We are led by the values that guided Jo's life as a campaigner, activist and humanitarian; a proud Yorkshire lass and internationalist; and a devoted mother, daughter, sister, wife, friend and MP.**

### More in Common

We act at all times on Jo's belief that we have more in common than that which divides us. We seek to bring people together and emphasise our collective commonality.

### Ambition

We pledge to uphold the level of ambition and relentlessness that Jo brought to the issues she cared about and we will be equally energetic and unrelenting in our mission to foster positive change.

### Empathy

We treat everyone with respect and understanding, championing the rights and contributions of all to achieve a fairer world. We call out abuse and hostility where we find it, and actively advocate tolerance and kindness in our discourse. We follow Jo's example to demonstrate that kindness and compassion are signs of strength, not weakness.

### Collaboration

We work in partnership to support and achieve ambitious targets. We contribute to larger networks in order to catalyse and amplify positive change, inspire activism in others, and mobilise action. Our work is true to Jo's belief that we are stronger than the sum of our parts. We work across political divides, and believe that we can achieve much more when we work together.



# JO COX: THE INSPIRATION BEHIND OUR WORK

Jo Cox was murdered on 16 June 2016 in the place she loved, her constituency of Batley and Spen, doing the work she loved, as an MP committed to helping the public. Having devoted her career to helping others both nationally and internationally, Jo entered public life to make a difference in the community where she grew up.



The reaction to her death – in Yorkshire, across Britain, and around the world – showed that the humanitarian values she lived by are widely shared. The way in which so many people continue to respond so positively more than four years after she was killed is testament to the fact that those values are enduring and unshakeable. An act of terror designed to divide us instead brought people closer together. Jo continues to inspire people all over the world.



The Jo Cox Foundation was established in 2016 by Jo's family and friends to channel the energy and determination generated by her life and tragic death. Inspired by Jo, The Jo Cox Foundation continues to build a positive legacy through the telling of her narrative and by working on issues she cared about.



Our work will remain true to the values that guided Jo's life as a campaigner, activist and humanitarian; a proud Yorkshire lass and internationalist; and a devoted mum, daughter, sister, wife, friend and MP.

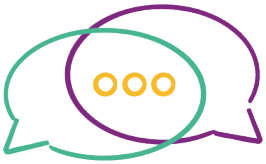
# The Year in Numbers



**3.5 million** people took part in the Great Get Together

**82%** of Great get Together participants said it increased their awareness of loneliness

**120** community organisers attended More in Common community training events



**25,500** Twitter posts used the hashtag #MoreInCommon

**800+** organisations joined the Connection Coalition

**18** charities in 14 countries supported humanitarian work in Jo's name



**35,000+** women received support from Jo Cox Memorial Grants

**1000+** people took part in the annual Run for Jo

**11** students completed work experience placements with Speakers for Schools

# STRONGER COMMUNITIES

**In her maiden speech to Parliament, Jo Cox talked of her joy in representing the diverse community of Batley and Spen where she grew up: "While we celebrate our diversity, what surprises me time and time again as I travel around the constituency is that we are far more united and have far more in common than that which divides us."**

**Jo's commitment to bringing people together and her belief in focusing on our commonalities drives our objective to work towards building strong compassionate communities where everyone has a sense of identity and belonging.**



"I will not live in a country where thousands of people are living lonely lives forgotten by the rest of us."
Jo Cox



# Moment to Movement

In February 2020, the Foundation embarked on a three-year project funded by Spirit of 2012 to explore the role of the Great Get Together as a springboard for deeper community activism through our More in Common groups. The funding from Spirit of 2012 allowed us to establish a Stronger Communities team, who led on the delivery of two ambitious Great Get Togethers and brought together our existing collection of More in Common groups to form The More in Common Network. Over this first year, emphasis was also placed on monitoring and evaluation, which included establishing a rigorous baseline for the project and developing a working theory of change.

# THE GREAT GET TOGETHER

**The Great Get Together (GGT) is the flagship initiative of the Foundation's 'Stronger Communities' strategic objective. It is designed to bring communities together in celebration of Jo Cox's 'more in common' message. This bi-annual celebration takes place on the weekend closest to Jo Cox's birthday in June and in the winter and is at the heart of our vision for a nation of strong, compassionate communities.**



# The Great Get Together 2020

The 2020 Great Get Together had to be radically altered due to the Covid-19 pandemic. Planned events such as street parties, picnics and sports days were replaced with socially distanced alternatives such as plant swaps, food bank collections and virtual Get Togethers. Despite the difficult circumstances people across the UK initiated their own activities to celebrate the power of community. We adapted events that would usually take place in person to make them virtual and accessible. We worked in close partnership with the Marmalade Trust, the Muslim Council of Britain and The Mirror to provide unique activations for people to take part in.



Over 2.5 million people participated in the initiative. Polling showed a very high level of recognition for the Great Get Together. 34% of people had heard of the event, with 13% reporting that they had attended a GGT. Over the month of the campaign (from launch on 19 May - 21 June) we had 40 million social media impressions. There were approximately 65 articles in press and online media, with 98 mentions on TV and radio. Coverage was both national and regional, including BBC News, ITV News, The Sun, and Daily Mirror, ITV News, a number of BBC stations and Talk Radio. The series of films we produced in the run up to the event have been viewed over 250,000 times on social media.











# The Great Winter Get Together 2020

The 2020 Great Winter Get Together was our most ambitious campaign to date. Spanning from mid December to Blue Monday on 18 January , each week was themed with specific calls on the public to face loneliness together: one connection at a time. People across the UK engaged with the campaign in many ways, yielding the largest reach the Great Winter Get Together has ever seen. We provided downloadable resources to support participants with practical ways to reduce loneliness. The Kindness Calendar and the 'Understanding Loneliness' toolkit were our most downloaded resources.




Over 3.5 million people participated in the campaign. Our polling showed a very high level of recognition for the Great Get Together. 29% of people had heard of the event, with 20% reporting that they participated in it (up 7% since June 2020). Over the month of the campaign (from launch on 30 Nov - 18 Jan) we had 28 million social media impressions. There were approximately 175 articles in press and online media. Coverage was both national and regional, including BBC News, The Times, ITV News, Huffington Post, The Sun, The Mirror, BBC Radio 5 Live and Times Radio. The media we produced in the run up and during the campaign has been viewed over 50,000 times.





# The More in Common Network

The More in Common Network was established in February 2020. It brought together the existing collection of More in Common groups, enabling them to connect with one another and engage in year-round community activism. In 2020, a focus was placed on laying the foundations for the Network to become impactful and to grow. This included: clarifying what it means to be a More in Common group, beginning to develop a new brand identity, piloting learning opportunities for organisers and conducting focus group research into the experience of More in Common groups.

Three new groups, Halton, Llanwit Major and Birmingham joined the Network in 2020. 120 people joined our Common Room webinar series to learn how to bridge divides and address loneliness in their communities. Overall 90% of people involved in The More in Common Network met someone who was different to themselves. Furthermore, with our partners we contributed to research pieces and submissions to the All-Party Parliamentary Group on Social Integration.



# Community Grants Initiative

Inspired by the inventive ways that people found to connect virtually, we partnered with Facebook to launch the Great Get Together Facebook Community Grants Scheme.

Through the scheme we funded 11 community projects across the country that are working to bring people together online and on social media.

"We were delighted to receive a Facebook Community grant from the Jo Cox Foundation to help develop our Peace Feast project. This enabled us to adapt to online delivery during lockdown and to put on 3 really successful Virtual Peace Feasts in October, December and January 2021. These events brought people together from diverse backgrounds across Bristol and beyond, helping to reduce isolation and enabling people to stay connected in spite of the restrictions."

**- Bridges 4 Communities, Bristol**

# The Connection Coalition

The Connection Coalition was established by The Jo Cox Foundation in April 2020 as a response to the Covid-19 pandemic. Alongside Mind, The British Red Cross, Facebook, Age UK, Nesta, Nationbuilder, the Small Charities Coalition and The Cares Family we brought together a network of organisations that were supporting individuals and communities through the pandemic as they faced intensified social and emotional crises including loneliness, mental health issues and bereavement.

In doing this we hoped to coordinate and amplify efforts to reinforce meaningful connections and to help mitigate the impact of isolation on social and emotional wellbeing throughout Covid-19 and beyond with a focus on:

- Inspiring people to build and maintain relationships and connections in their communities;
- Encouraging people to carry forward relationships and connectedness with them into the post-crisis period, helping to tackle loneliness and social isolation in their communities, and to reduce the associated stigma;
- Influencing organisations, funders and the Government to invest financially and in policies which prioritise the power of relationships and connectedness.

**In 2020 we:**

- Recruited over 800 member organisations;
- Sent over 25 newsletters packed with resources, updates and ideas;
- Ran webinars for over 400 people;
- Reached millions through our Community Makes Us campaign.

Connection Coalition

**What members said:**

"As the rep of a small organisation it is good to feel part of something bigger and more influential"

"It was lovely to see so many people from up and down the country with the same mission."

"It has been great to be part of this initiative, it has helped workers to feel less isolated, particularly those working from home during this period."

"The Coalition has provided me and my team with a community of people who we can share successes and challenges with in real time. We have never been part of a community like this before. It has been invaluable during lockdown during times when me and my staff have ourselves felt like we were 'on our own' trying to solve problems and support our communities. We look forward to this community growing in the months ahead".

# Community Makes Us campaign

- Community Makes Us was a campaign in the summer of 2020 from the Connection Coalition which sought to celebrate the social connections and reciprocal acts of support seen in communities across the country during Covid.
- The **#CommunityMakesUs** campaign reached approximately 6,800,000 individuals via social media channels.








# Tackling Loneliness Advocacy

The Covid-19 pandemic in 2020 brought a new focus onto loneliness and social isolation given how widespread these experiences became. Over the course of the year, we continued to work closely with numerous stakeholders to capture experiences of loneliness and share this with those in decision making positions. In particular, we gathered recommendations from Connection Coalition members who had direct experience on the frontline of community work.

We shared these learnings with DCMS and made a submission to consultations on the 'Levelling Up' agenda, the House of Lords Covid Inquiry and the APPG on Social Integration. We enjoyed widespread cross-party political support for the Great Get Together in June, including an event on loneliness hosted by Labour leader Keir Starmer MP and Dr Rosena Allin-Khan MP. We continued to work closely with DCMS, supporting their ongoing 'Let's Talk Loneliness' campaign. Additionally, we met with the Office for National Statistics regarding the collection of data on loneliness and social isolation.

# YORKSHIRE

**“I am Batley and Spen born and bred, and I could not be prouder of that. I am proud that I was made in Yorkshire and I am proud of the things we make in Yorkshire. Britain should be proud of that, too. “ - Jo Cox, Maiden Speech 2015**



# Loneliness Conference

In February 2020 we hosted the first Huddersfield Loneliness Conference in partnership with the Kirklees Befriending Partnership (made up of Yorkshire Children's Centre; Royal Voluntary Service, Age UK Calderdale and Kirklees; Locala Community Partnership & Kirkwood Hospice) and West Yorkshire and Harrogate Health and Care Partnership.

Speakers included Rachel Reeves MP, Co-Chair of The Jo Cox Commission on Loneliness, Tracey Crouch, the world's first Minister for Loneliness and Diana Barran, Lords Minister for Civil Society and Loneliness. The conference included a series of interactive workshops led by the Kirklees BefriendingPartnership and was attended by delegates from 60 local organisations.

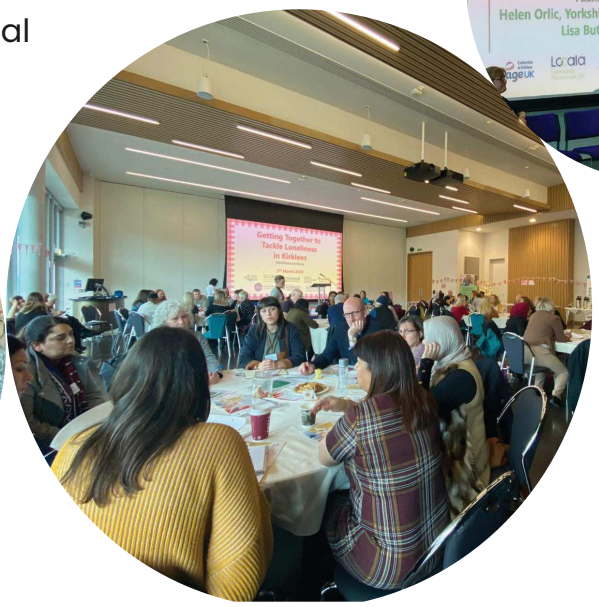
"The Jo Cox Foundation continues to inspire so many of us who work to reduce loneliness. It's great that so many dedicated organisations have come together at this important event raising awareness of loneliness in Kirklees."

**- Baroness Barran, Minister for Loneliness**










# Kirklees Community Anchor

As part of the localised Covid-19 response across Batley and Spen, we worked with the local authority and a number of third sector and business partners to provide practical support to over 2,000 vulnerable people struggling with the challenges of the pandemic.

We worked with local partners to distribute wellbeing packs to vulnerable local people during the early stages of Covid-19 lockdown. We were guided by over 20 schools across Batley and Spen to identify over 200 families in need due to the pressures of isolating and/or home schooling and 200 packs for older people who were self-isolating or shielding.

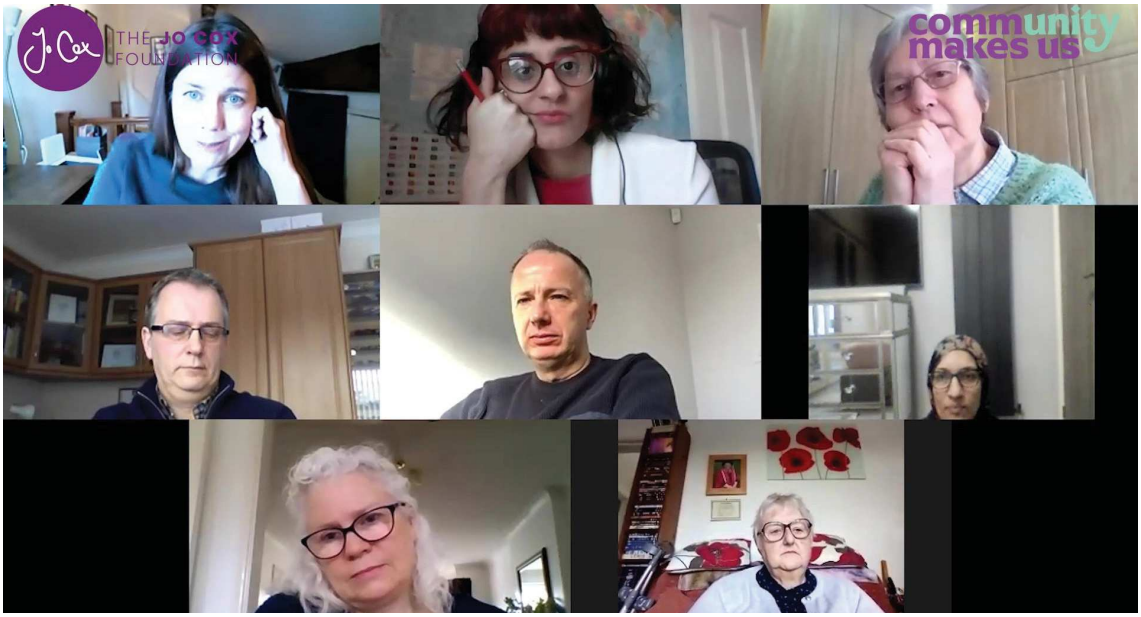
# Community Makes Us

In October 2020 we launched the Community Makes Us project which brought together 46 local people in Batley and Spen to share their experiences of the pandemic, lockdowns and think of ways they can support each other and the wider community. Friendships, insights and support came to the fore through the online conversations.









# A BETTER PUBLIC LIFE

**Jo Cox was passionate about encouraging women into public life, and making parliament more family-friendly and therefore appealing and accessible to people from all walks of life. When her coat of arms was unveiled by the then Speaker of the House John Bercow, he said: "MPs are parents, children and family members themselves... Jo was a powerful role model for all MPs of the present and future for her desire to balance these personas."**

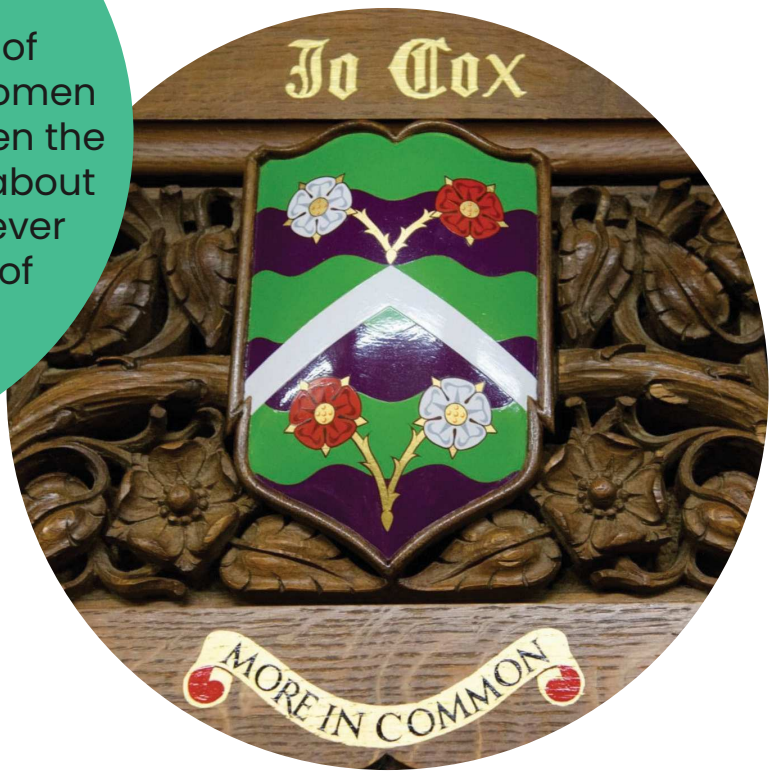


**Jo was also renowned for her ability to forge cross-party relationships and work collaboratively with those of opposing political views. This very much guides our objective to contribute meaningfully to a more welcoming and less toxic public life.**

**We strongly believe that the increasing toxicity in public life and growing public distrust towards those in public life poses a threat to democracy itself. In 2020 we continued to tackle abuse and intimidation as major barriers to achieving a civil public life in which all people, regardless of their background, can participate equally.**

"One of the reasons I am entering politics is because only 23% of the House of Commons is female. If women don't make that 50/50 then the people taking decisions about our communities are never going to be reflective of the needs"

Jo Cox




The Jo Cox memorial plaque - designed by Jo's two children - was installed in the House of Commons chamber in June 2017.

# Supporting Women in Public Life

Throughout 2020 the Foundation actively campaigned as a member of the cross-party campaigning coalition the **Centenary Action Group**, contributing to advocacy campaigns to increase women's political participation and leadership, end violence against women and girls, and make political life more family-friendly.

# Tackling Intimidation

Intimidation in public life disproportionately affects women and has a detrimental impact on the pipeline of future female public servants. Jo's murder is a tragic and unavoidable reminder of the danger to women in high-profile public roles. The fear of abuse and intimidation is increasingly cited as a barrier to young girls - particularly those from diverse and underprivileged backgrounds - considering public-facing careers. It is therefore a threat to democracy itself.

# The Joint Standard of Conduct

Following recommendations made in the Committee on Standards in Public Life (CSPL) 2017 Intimidation in Public Life review, the Foundation and the CSPL have worked closely to produce the Joint Statement on Conduct of Political Party Members. In December 2020, on the third anniversary of the 2017 Intimidation in Public Life report, we launched the Joint Statement on Conduct for political party members with support from the Liberal Democrats, The Green Party of England and Wales, Plaid Cymru and the SNP.

The Joint Statement on Conduct sets out the minimum standards of behaviour that are expected from members of the political parties that have signed the statement. The statement is not intended to supersede or replace party codes of conduct or disciplinary processes, but to complement them by acting as a high level statement of principle outlining the minimum standards of behaviour that all party members should aspire to.



# Make Misogyny History Campaign

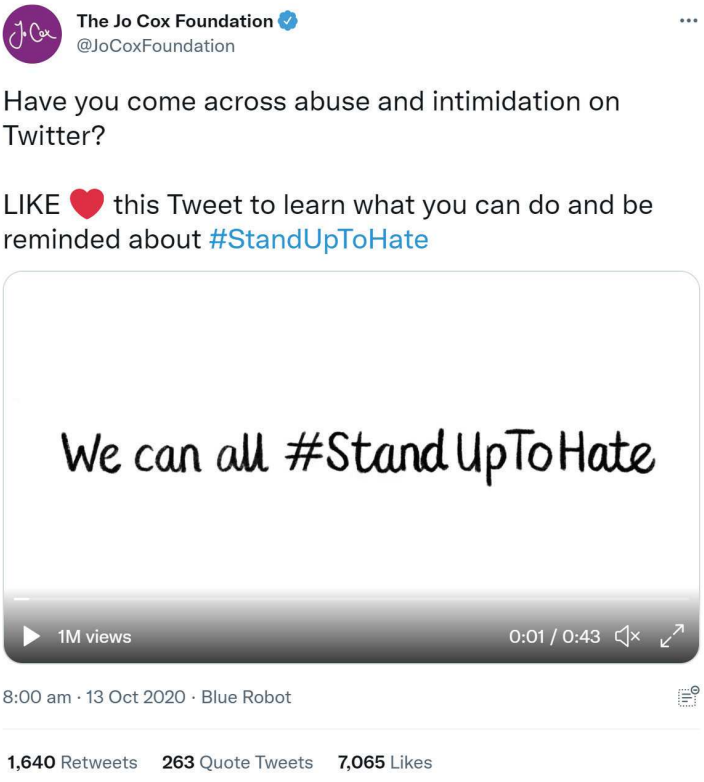
Throughout 2020 we actively supported Stella Creasy MP's campaign to have misogyny recorded by all police forces as a hate crime. We co-hosted a bootcamp for activists on the issue and inspired our followers to write to their MPs to support an amendment to the Domestic Abuse bill that would set a precedent for making Misogyny a Hate Crime. In September, we tasked 8 students to develop a social media campaign to promote the campaign as part of their Speakers 4 Schools work experience placement. In December, we submitted evidence to the Law Commission to support our view.

"Misogyny is one of the root causes of Violence Against Women, with hostility towards women leading to many forms of physical, sexual, emotional and financial abuse. From young girls being subject to cat-calling and street harassment, to women fearing for their lives at the hands of a violent partner, the impacts of misogyny on mental health, confidence and a sense of safety in our society cannot be overstated."

**- The Jo Cox Foundation submission to the Law Commission Hate Crime Review, December 2020**

# #StandUpToHate

In October we joined forces with Twitter and 12 civil society groups to launch #StandUpToHate, a project to encourage Twitter users to report online abuse and support the victims of this abuse. Users who interacted with our 15 second animation - which depicted a victim of online abuse being supported by friends and organisations - received an automatic response encouraging them to #StandUpToHate. The animation received 3 million impressions and 8,759 likes on Twitter. 41% of Twitter users who interacted with the campaign said they were more aware of the tools that can be used to counter hate on the platform.



# A FAIRER WORLD

**Jo Cox was a true humanitarian and had a 20-year career in international aid and development, working on campaigns around the world from Darfur to Afghanistan. Her work on Syria in particular was the cornerstone of much of her work as an MP; her leadership in calling for the protection of Syrians was unique. She was also a staunch advocate of an ethical foreign policy, and committed to the protection of civilians in conflict and the prevention of genocide and mass atrocities. Throughout her career she was a proponent of the global 'Responsibility to Protect' doctrine.**



**Through our work on building a fairer world, we are committed to adding value wherever we can on the international issues that Jo cared so much about. Through this work, we will celebrate Jo's internationalism, her 20-year career in international campaigning and development aid, and her compassion towards the world's most vulnerable.**



"Every decade or so, the world is tested by a crisis so grave that it breaks the mould: one so horrific and inhumane that the response of politicians to it becomes emblematic of their generation — their moral leadership or cowardice, their resolution or incompetence. It is how history judges us. We have been tested by the Second World War, the genocide in Rwanda and the slaughter in Bosnia, and I believe that Syria is our generation's test."

Jo Cox

# International Development and Human Rights Advocacy Work

In August, in collaboration with the UK Atrocity Prevention Working Group, The Foundation produced a joint submission to the government's review of the merger of the Foreign & Commonwealth Office (FCO) with the Department for International Development (DFID). The submission outlined how the United Kingdom might build upon its rhetorical commitment to prevent atrocities, to learn the lessons of past genocides, and to uphold the collective responsibility to protect.

In November, the government announced the 0.7% overseas aid target would be cut to 0.5%. We expressed our dismay and joined partners in calling for the government to reinstate this commitment. We continue to campaign on this issue in 2021.

Throughout the year we used our platforms to raise awareness and understandings of past atrocities with organisations such as the Holocaust Educational Trust and Remember Srebrenica. We called for government action to address current atrocities, including signing the Uyghur Human Rights Project's open letter on the ongoing genocide in China.

# Jo Cox Memorial Grants

The Jo Cox Memorial Grants (JCMG) were launched in memory of Jo in March 2018 as part of the UK Aid Direct fund. The grants were set up for projects across two themes that Jo Cox was passionate about: supporting and improving women's social, economic and political empowerment, and strengthening civil society capacity for the early prediction and prevention of identity-based violence, including mass atrocities. On the 3 March 2020 we were delighted to be joined by Baroness Sugg, former Parliamentary Under-Secretary of State at the Department for International Development (DFID) and the Foreign and Commonwealth Office, at a special event to announce the recipients of the grants.





As of June 2021 (outside of the reporting period), 35,720 women across the world have benefitted from the grants, with 1,223 women being helped into politics and 558 women in leadership positions receiving assistance and training. 21 projects in total were funded (17 were active by 2021), across 14 countries that are listed in the lowest 50 countries in the UN Human Development Index (HDI) and countries the UK Government considers to be of high or moderate fragility.



"Jo cared passionately about gender equality and preventing identity based violence. These causes are absolutely fundamental to ending violence against vulnerable groups and giving every girl in the world the chance to go to school and realise her full potential. With funding from UK AID in Jo Cox's memory, these projects will help to achieve that."

**- Baroness Sugg, Former Parliamentary Under Secretary of State in the Department for International Development**

# LEGACY INITIATIVES

The Foundation has actively supported and championed a wide range of initiatives paying tribute to Jo in the UK and around the world. In 2020 we collaborated with the People's History Museum, Manchester to prepare for the launch of the 'Jo Cox: More in Common' exhibition in May 2021.

The Foundation has responded to hundreds of individual items of correspondence which detail different ways in which individuals, communities, businesses and schools are celebrating Jo's life, taking forward her work and upholding her values. The Foundation has encouraged and engaged a growing community of 100,000 supporters across all of its digital channels. This community is composed of powerful agents for change engaged in amplifying the Foundation's objectives and being advocates for Jo's values more broadly, right across the UK and around the world.

## #InspiredByJoCox

To celebrate International Women's Day, we asked a selection of incredible women how they have been #InspiredByJoCox. We received so many thoughtful and emotional responses that we needed to create two videos to be able to post them on social media.




"When Jo died, I said it now falls on all of our shoulders to take forward her work and I am incredibly proud that the work that I did with Seema Kenedy, a Conservative MP, in setting up the Jo Cox Commission on Loneliness, is something that Jo cared passionately about. Because of Jo, I took up that campaign, worked with somebody I might not always agree with and found a lasting friendship, and I hope did some work that made a big difference to people's lives."

**- Rachel Reeves**

# Supporting Young People into the Voluntary Sector

In 2020, we built on our partnership with Speakers for Schools to help level the playing field for state school and college students. Throughout the year, we provided high-quality week-long work experience placements to 11 students without family or school links to work experience opportunities, all delivered virtually.

"The placement has been so valuable and I feel so lucky to have experienced it...I have learnt so much in four days, the advice has been completely invaluable and has definitely empowered me to gain more experience and inspired me to consider working for an organisation like JCF"

**- Kate Dumelow, 17, Warwickshire**

"Thank you for providing me with such a wonderful opportunity this week, it really opened my eyes to problems across the UK and made me more passionate about fixing them. I will be sure to take all the skills I've learnt this last week and put them into future work experience and hopefully future employment!"

**- Matthew, 16, Shropshire**



# COMMUNICATIONS AND MESSAGING

### Great Get Together Rebrand and New Website

In October 2020 we overhauled the Great Get Together brand to make it a fully developed brand identity. The aims were to build an identity which was visually more accessible and more inclusive to wider audiences. We relaunched the Great Get Together website to improve the user experience and help increase participation ahead of the Great Winter Get Together. Incorporating the new branding, the new website features an efficient event system with easy user sign-up, downloadable assets, such as toolkits and hosts key information about the campaign in a mobile-friendly and readable manner.

From the date of the website launch to the end of the Great Winter Get Together campaign 46,200 users visited the website, 2,977 campaign assets were downloaded and 1,278 users had subscribed to the Great Get Together newsletter.

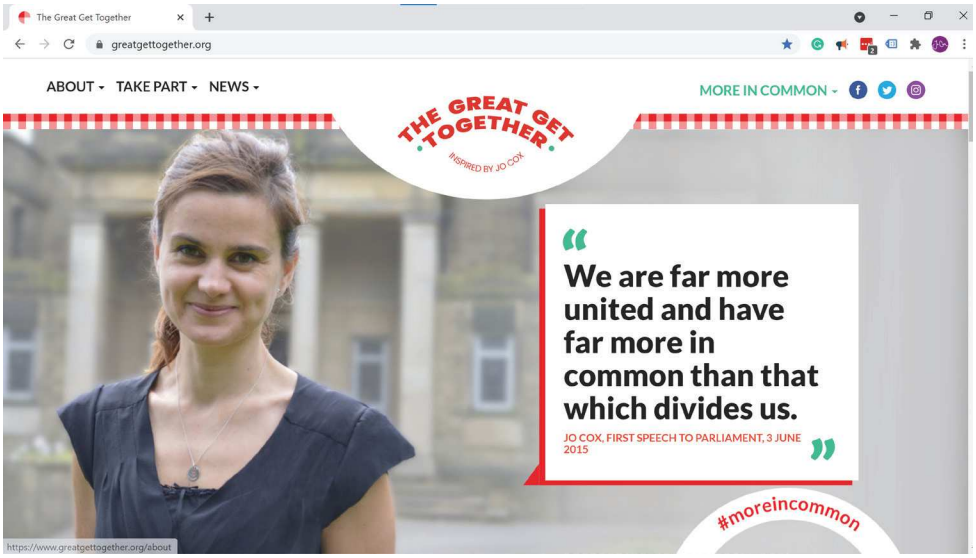
### Digital Reach

There were approximately 80,000 posts relating to The Jo Cox Foundation and its various campaigns and initiatives in 2020.

**18,400 engagements with**
**@JoCoxFoundation**

**17,700 posts mentioned**
**The Great Get Together.**

**25,500 posts used the hashtag**
**#MoreInCommon**



# PRIORITIES FOR 2021

**Deepening our Community-Strengthening Work**

We anticipate that our Stronger Communities work will have particular importance and resonance in 2021 as the world continues to face the Covid-19 pandemic. We will place particular emphasis on:

- Continuing to build the foundations of the More in Common network in the first six months of the year, before placing an emphasis on growth, and the recruitment of new groups
- Growing the impact of the Great Get Together in June, especially supporting new organisers to get involved for the first time
- Using our convening strength to build relationships between the members of the Connection Coalition, using informal networking, speed-dating and buddying as well as more formal subgroups and communities of practice.

**Upholding Jo's Local Legacy in Batley and Spen**

The Foundation's presence in Batley and Spen, Jo Cox's constituency, is a vital part of our work. 2021 will see us undertake strategic development work with two aims. Firstly, we'll be exploring the specific niche that we have in Batley and Spen, and investigating where we can have the most impact. Secondly, we'll be working to further integrate our work in Yorkshire with the national work, leading with a 'one team' approach that allows us to amplify local learnings nationally.

**Promoting a Civil Public Life**

Political discourse in the UK is showing no signs of becoming more civil and the Jo Cox Foundation will continue with our work to promote a better public life in 2021. We'll continue to shine a light on the abuse and intimidation of politicians, encourage civil campaigning during the May elections, and work to build a solid evidence base about the extent of the problem that politicians face.

**Advocating for Justice and Protection of Civilians in Conflict**

In 2021 the Foundation will advocate for the continuation of the UK Aid funded Jo Cox Memorial Grant Scheme and make the case for a workable aid policy and ring-fenced budget through connecting the FCDO work to British issues and policy-making; particularly through the lessons from the IBV programmes. We will continue to illustrate the story of Jo's international and humanitarian work through the active contribution within networks working on the issues she cared most about: R2P, prevention of atrocities in conflict-zones, and the prediction and identification of identity-based violence.

# Priorities For 2021

**Building a Culture of Inclusivity**

Our staff team grew considerably in 2020. We are very anxious that this welcome expansion of our team builds on the inclusive culture of the Foundation, reflective of Jo's values. This has let us to a full review of our internal policies and processes – particularly those relating to staff and trustee recruitment, staff wellbeing and flexible working. The JCF staff team will be embarking in a nine-week anti-racism training and coaching training programme from February 2021. Being able to effect change by activating our anti-racist vision collectively - engaging those in different locations, job functions, varying seniority, and of different races and ages - is what will make it powerful and sustainable.

We will continue to prioritise staff wellbeing as Covid-19 continues to create challenges to our staff team's professional and personal lives. In 2021 we will appoint multiple staff wellbeing leads (including the CEO) and provide mental-health first aid training and implement a new internal wellbeing policy.

**2021-23 Strategy**

In 2021 we'll continue to refine and adapt our long-term strategy for 2021-23. We will evaluate the impact of Covid-19 on our programmes, and ensure that we're focusing on where we, as The Jo Cox Foundation, are best placed to make a difference, both directly and in partnership with others.

# Our People



### Trustees

- Jacqui Smith (Chair)
- Rosamund Blomfield-Smith (Treasurer)
- Jennie Richmond
- Eloise Todd
- Jane Brady
- Samantha Vickers
- Steve Morris

### 2020 Staff Team

- Catherine Anderson
- Clare Black
- Dave Hawksworth
- Eleanor Harrison
- Ella Turner
- Emily Danby
- Hafeezah Soni
- Hannah Brown
- Jess Jackson
- Jessica Leach
- Jo Atkins-Potts
- Josh Westerling
- Kim Leadbeater
- Lance Price
- Marianne Quinn
- Nathan Stilwell
- Parveen Butt
- Phoebe Kluck
- Su Moore

**Everyone at The Jo Cox Foundation would like to thank each individual and organisation who supported our work and Jo's legacy in 2020:**

### Strategic Funding and Corporate Partners

- Spirit of 2012
- The Esmee Fairbairn Foundation
- Astra Foundation
- The National Lottery
- NESTA
- DCMS
- Joseph Rowntree Reform Trust
- The National Lottery Trust
- Kirklees Council
- Third Sector Leaders
- One Community Foundation
- County Durham Community Foundation
- Facebook
- Popsa
- BT
- Specsavers
- PPG
- GMB Yorkshire

### Communications Partners

- Empower
- Portland
- Nationbuilder
- Social Eyes

# FINANCE & GOVERNANCE REVIEW

## Risk Management

The Foundation has a rigorous risk management process through which the Trustees and leadership team identify any major risks to which the Foundation may be exposed and ranks these by likelihood and impact culminating in a risk register which is updated on a monthly basis. Where appropriate, systems, policies and procedures have been established to mitigate the risks that the Foundation faces.

A principal risk area identified by the Trustees is reputational risk, especially in the light of the high-profile nature of the Foundation. To mitigate this risk, the Foundation communicates regularly with its supporters and beneficiaries and identifies transparency as one of its key values.

The Trustees have also identified the lack of long-term sustainable income streams as one of the principal risks faced by the Foundation. In order to mitigate this risk, the Foundation has developed plans to generate future income from diverse sources to as to ensure that our current sustainable income streams are maintained. In 2021, the Foundation intends to raise core funding from trusts and foundations and through individual donations. We continue to work with strategic corporate partners who support our work through financial and non-financial support, as well as employee and customer fundraising. Our corporate partnerships are subject to our ethical partnerships policy and due diligence procedures.

# Principal Funding Sources

**Restricted Funding:**
The Foundation has received restricted grants and designated project funding from corporates, grant-making trusts and individual philanthropists, including:

1. Spirit of 2012 - £256,296 - Moment to Movement Workstream
2. Spirit of 2012 - £40,000 - Connection Coalition
3. Nesta - £30,000 - Connection Coalition
4. Astra Foundation - £51,000 - Connection Coalition
5. Facebook - £10,321 - Great Get Together Workstream
6. Esmee Fairbairn Foundation - £20,000 - More in Common Community Workstream
7. The National Lottery - £30,528 - Community Makes Us Project
8. One Community Foundation - £5,000 - Covid Response Projects, Batley and Spen
9. Kirklees Council/Third Sector Leader - £60,128 - Community Anchor Role, Covid Response Projects, Batley and Spen
10. PPG - £13,000 - Covid Response Projects, Batley and Spen
11. Joseph Rowntree Reform Trust - £13,750 - Civility in Politics Awards
12. County Durham Community Foundation - £4,000 - More in Common Community Workstream

**Unrestricted Funding:**

1. Facebook - £35,000 - Donation
2. Popsa - £40,739 - Sales Donation
3. JCF online and offline individual, community and corporate donations: £23,801
4. Batley and Spen online and offline individual, community and corporate donations: £93,849
5. GiftAid: £18,790

# Reserves Policy

The current level of the reserves in the accounts is £101,539 (2019: £12,607) of unrestricted funds and £131,388 (2019: £119,944) of restricted funds. This is in line with the organisation's reserve's policy.

# Going Concern

After making appropriate enquiries, the Trustees have a reasonable expectation that the Foundation has adequate resources to continue in operational existence for the foreseeable future. The Covid-19 pandemic has clearly had a significant impact on the Foundation's fundraising activities and on its ability to deliver its key operations. The Trustees will be monitoring the position closely and making any necessary adjustments. However, despite the difficulties to which Covid-19 has given rise, the Trustees believe that there is no reason to call into doubt the Foundation's ability to continue in operation.

# Governance

The Trustees who are also directors of the charity for the purposes of the Companies Act 2006, present their report with the financial statements of the charity for the period 1st January 2020 to 31st December 2020. The Trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

**Incorporation**
The charitable company was incorporated on 23rd September 2016.

**Grant Making**
When giving out grants, the Foundation puts in place a Grant Agreement with the grantee organisation.

The Foundation has an appointed Grant Manager who oversees the due diligence and grant making process.

# Structure, Governance & Management

**Governing document**
The Foundation is structured as a company limited by guarantee registered in England and Wales under company number 10392667.

**Recruitment and appointment of new trustees**
Any person who is willing to act as a Trustee, and who would not be disqualified from acting under the provisions of the articles, may be appointed to be a Trustee by a decision of the Trustees. The Foundation has appointed 2 new trustees in 2020.

**Organisational structure**
The Foundation has trustees (between four-twelve at any one time) including one chair; Jacqui Smith.

The Foundation has a chief executive officer, Su Moore, who manages a small team of around 20 members of staff.

**Induction and training of new trustees**
Upon joining The Jo Cox Foundation as a Trustee, Trustees are required to complete a conflict of interest declaration pursuant to the Foundation's conflict of interest policy.

New Trustees receive a copy of the Foundation's Articles of Association as well as a summary of past Board meeting minutes and accounts and an overview of the Foundation's management and governance.

# Public Benefit

Over the past 12 months, demonstrating public benefit has been an essential precondition in choosing how to allocate the Foundation's funds. The Foundation's activities have benefited the general public through:

1. Raising awareness of Jo Cox's life and her public service (including her charitable activities) in order to promote community inclusion, including fostering respect and kindness between different communities;

2. Supporting other charities and organisations to advance the causes Jo Cox was passionate about during her life;

3. Running campaigns to raise awareness of particular issues including loneliness, community cohesion, civility in public life and protecting civilians in conflict.

When deciding on the activities undertaken for public benefit, the Trustees have assessed the guidance issued by the Charity Commission on public benefit.

# Reference and Administrative Details

**Registered Company Number**
10392667 (England and Wales)

**Registered Charity Number**
1170836

**Registered Office**
Living Space, 1 Coral Street, London, SE1 7BE

**Trustees**
E Todd - appointed 20/10/16,
S Morris - appointed 1/5/18,
J Brady - appointed 1/5/18,
J Smith - appointed 14/01/19,
S Vickers - appointed 14/01/19,
J Richmond - appointed 14/01/20,
R Blomfield-Smith - appointed 10/09/20

**Resigned Trustees**
M Van Oranje - resigned 08/12/20

**Independent Examiner**
Kirk Rice LLP, The Courtyard, High Street, Ascot, Berkshire, SL5 7HP


"We have more in common than that which divides us"
– Jo Cox
Jo Cox
THE JO COX FOUNDATION

**Charity Registration No. 1170836**

**Company Registration No. 10392667 (England and Wales)**

# THE JO COX FOUNDATION

# ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS

# FOR THE YEAR ENDED 31 DECEMBER 2020

# THE JO COX FOUNDATION

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# THE JO COX FOUNDATION

## INDEPENDENT EXAMINER'S REPORT

## TO THE TRUSTEES OF THE JO COX FOUNDATION

I report to the trustees on my examination of the financial statements of The Jo Cox Foundation (the charity) for the year ended 31 December 2020.

**Responsibilities and basis of report**

As the trustees of the charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Companies Act 2006 (the 2006 Act).

Having satisfied myself that the financial statements of the charity are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the charity's financial statements carried out under section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

**Independent examiner's statement**

Since the charity's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of FCCA CTA, which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1 accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act; or

2 the financial statements do not accord with those records; or

3 the financial statements do not comply with the accounting requirements of section 396 of the 2006 Act 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; or

4 the financial statements have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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 financial statements to be reached.

Graham Jennings

Kirk Rice LLP

Graham Jennings FCCA CTA
The Courtyard
High Street
Ascot
Berkshire
SL5 7HP

Dated: 23/09/2021

# THE JO COX FOUNDATION

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

### *FOR THE YEAR ENDED 31 DECEMBER 2020*

| | Notes | Unrestricted funds 2020 £ | Restricted funds 2020 £ | Total 2020 £ | Unrestricted funds 2019 £ | Restricted funds 2019 £ | Total 2019 £ |
|---|---|---|---|---|---|---|---|
| **Income and endowments from:** | | | | | | | |
| Donations and legacies | 3 | 212,179 | 534,023 | 746,202 | 153,263 | 216,368 | 369,631 |
| Other income | 4 | 3,478 | - | 3,478 | - | - | - |
| **Total income** | | 215,657 | 534,023 | 749,680 | 153,263 | 216,368 | 369,631 |
| **Expenditure on:** | | | | | | | |
| Charitable activities | 5 | 194,965 | 454,339 | 649,304 | 222,924 | 302,550 | 525,474 |
| **Net incoming/(outgoing) resources before** | | 20,692 | 79,684 | 100,376 | (69,661) | (86,182) | (155,843) |
| Gross transfers between funds | | 68,240 | (68,240) | - | (109,837) | 109,837 | - |
| **Net income/(expenditure) for the year/ Net movement in funds** | | 88,932 | 11,444 | 100,376 | (179,498) | 23,655 | (155,843) |
| Fund balances at 1 January 2020 | | 12,607 | 119,944 | 132,551 | 192,105 | 96,289 | 288,394 |
| **Fund balances at 31 December 2020** | | 101,539 | 131,388 | 232,927 | 12,607 | 119,944 | 132,551 |

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

# THE JO COX FOUNDATION

## BALANCE SHEET

### *AS AT 31 DECEMBER 2020*

| | Notes | 2020 £ | 2020 £ | 2019 £ | 2019 £ |
|---|---|---|---|---|---|
| **Fixed assets** | | | | | |
| Tangible assets | **8** | | 347 | | 956 |
| Investments | **9** | | 1 | | 1 |
| | | | 348 | | 957 |
| **Current assets** | | | | | |
| Debtors | **10** | 8,443 | | 10,234 | |
| Cash at bank and in hand | | 233,499 | | 140,511 | |
| | | 241,942 | | 150,745 | |
| **Creditors: amounts falling due within one year** | **11** | (9,363) | | (19,151) | |
| Net current assets | | | 232,579 | | 131,594 |
| **Total assets less current liabilities** | | | 232,927 | | 132,551 |
| **Income funds** | | | | | |
| Restricted funds | **12** | | 131,388 | | 119,944 |
| Unrestricted funds | | | 101,539 | | 12,607 |
| | | | 232,927 | | 132,551 |

The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 December 2020.

The directors acknowledge their responsibilities for ensuring that the charity keeps accounting records which comply with section 386 of the Act and for preparing financial statements which give a true and fair view of the state of affairs of the company as at the end of the financial year and of its incoming resources and application of resources, including its income and expenditure, for the financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the company.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 23/09/2021

.....

Rt Hon J J Smith
**Trustee**

**Company Registration No. 10392667**

### 1 Accounting policies

**Charity information**

The Jo Cox Foundation is a private company limited by guarantee incorporated in England and Wales. The registered office is Living Space, 1 Coral Street, London, SE1 7BE, England.

### 1.1 Accounting convention

The financial statements have been prepared in accordance with the charity's written special resolution, circulated on 16th January 2018, the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)". The charity is a Public Benefit Entity as defined by FRS 102.

The charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The financial statements are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest £.

The principal accounting policies adopted are set out below.

### 1.2 Going concern

At the time of approving the financial statements, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

### 1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

### 1.4 Income

All income is recognised in the Statement of FInancial Activities once the charity has entitlement to the funds, it is probable that the income will be recieved and the amount can be measured reliably.

### 1.5 Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the catergory. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

### 1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

| | |
|---|---|
| Computers | 33.33% on cost |

**1 Accounting policies**

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in net income/(expenditure) for the year.

**1.7 Fixed asset investments**

Fixed asset investments are initially measured at transaction price excluding transaction costs, and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in net income/(expenditure) for the year. Transaction costs are expensed as incurred.

**1.8 Impairment of fixed assets**

At each reporting end date, the charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any).

**1.9 Cash and cash equivalents**

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

**1.10 Employee benefits**

The charitable company operates a defined contribution scheme. Contributions payable to the charitable company's pension scheme are charged to the Statement of Financial Activities in the period to which they relate.

**1.11 Retirement benefits**

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

**1.12 Leases**

Rentals payable under operating leases, including any lease incentives received, are charged as an expense on a straight line basis over the term of the relevant lease.

**1.13 Debtors**

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid after taking account of any trade discounts due.

**1.14 Creditors**

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

**2 Critical accounting estimates and judgements**

In the application of the charity's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

**3 Donations and legacies**

| | **Unrestricted funds** | **Restricted funds** | **Total** | Unrestricted funds | Restricted funds | Total |
|---|---|---|---|---|---|---|
| | **2020** | **2020** | **2020** | 2019 | 2019 | 2019 |
| | **£** | **£** | **£** | £ | £ | £ |
| Donations and gifts | 212,179 | 534,023 | 746,202 | 153,263 | 179,368 | 332,631 |
| Other | - | - | - | - | 37,000 | 37,000 |
| | 212,179 | 534,023 | 746,202 | 153,263 | 216,368 | 369,631 |
| **For the year ended 31 December 2019** | 153,263 | 216,368 | | | | 369,631 |

**4 Other income**

| | **Unrestricted funds** | Total |
|---|---|---|
| | **2020** | 2019 |
| | **£** | £ |
| Other income | 3,478 | - |

**5 Charitable activities**

| | Operational Overheads 2020 | The Great Get Together 2020 | Batley & Spen 2020 | Spirit of 2012 2020 | Esmee Fairbairn 2020 | GEO 2020 | Astra Connection Coalition 2020 | Joseph Rowntree Reform Trust 2020 | NESTA Connection Coalition 2020 | Connection Coalition | Total 2020 | Total 2019 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Staff Costs | 114,050 | 3,779 | 24,177 | 183,466 | 48,522 | | 2,998 | | | - | 376,992 | 257,774 |
| Depreciation and Impairment | 610 | - | - | - | - | - | - | - | - | - | 610 | 1,510 |
| Other operating leases | 6,270 | - | - | - | - | - | - | - | - | - | 6,270 | 19,283 |
| Insurance | - | - | - | - | - | - | - | - | - | - | - | 1,073 |
| Telephone and Internet | 6,028 | - | - | - | - | - | - | - | - | - | 6,028 | 15,491 |
| Postage and Stationery | 789 | - | - | - | - | - | - | - | - | - | 789 | 1,432 |
| Travelling | 1,040 | - | - | - | - | - | - | - | - | - | 1,040 | 3,341 |
| Subscriptions | 120 | - | - | - | - | - | - | - | - | - | 120 | 343 |
| Consultancy | 39,454 | - | 18,405 | 23,420 | - | - | - | - | 14,744 | - | 96,023 | 51,580 |
| Bank Charges | 602 | - | - | - | - | - | - | - | - | - | 602 | 557 |
| Sundries | 404 | - | - | - | - | - | - | - | - | - | 404 | 1,687 |
| Legal Fees | 841 | - | - | - | - | - | - | - | - | - | 841 | 567 |
| Accountancy Fees | 9,363 | - | - | - | - | - | - | - | - | - | 9,363 | 9,989 |
| Campaigns | 15,394 | 26,005 | 15,254 | 64,385 | 389 | 2,000 | 5,102 | 7,398 | 14,295 | - | 150,222 | 160,847 |
| | 194,965 | 29,784 | 57,836 | 271,271 | 48,911 | 2,000 | 8,100 | 7,398 | 29,039 | - | 649,304 | 525,474 |
| **Analysis by fund** | | | | | | | | | | | | |
| Unrestricted funds | 194,965 | - | - | - | - | - | - | - | - | - | 194,965 | 222,924 |
| Restricted funds | - | 29,784 | 57,836 | 271,271 | 48,911 | 2,000 | 8,100 | 7,398 | 29,039 | - | 454,339 | 302,550 |
| | 194,965 | 29,784 | 57,836 | 271,271 | 48,911 | 2,000 | 8,100 | 7,398 | 29,039 | - | 649,304 | 525,474 |

## 5 Charitable activities

**For the year ended 31 December 2019**

| | Operational Overheads | The Great Get Together | Batley & Spen | Spirit of 2012/ WIPL | John Ellerman Foundation | Total 2019 |
|---|---|---|---|---|---|---|
| | £ | £ | £ | £ | £ | £ |
| Staff costs | 152,083 | 66,938 | 32,212 | - | 6,541 | 257,774 |
| Depreciation and impairment | 1,510 | - | - | - | - | 1,510 |
| Other operating leases | 19,283 | - | - | - | - | 19,283 |
| Insurance | 1,073 | - | - | - | - | 1,073 |
| Telephone and internet | 15,491 | - | - | - | - | 15,491 |
| Postage and stationery | 1,432 | - | - | - | - | 1,432 |
| Travelling | 3,341 | - | - | - | - | 3,341 |
| Subscriptions | 343 | - | - | - | - | 343 |
| Consultancy | 15,239 | 24,656 | 7,560 | - | 4,125 | 51,580 |
| Bank charges | 557 | - | - | - | - | 557 |
| Sundries | 1,687 | - | - | - | - | 1,687 |
| Legal fees | 567 | - | - | - | - | 567 |
| Accountancy fees | 9,989 | - | - | - | - | 9,989 |
| Campaigns | 329 | 88,439 | 42,436 | 19,767 | 9,876 | 160,847 |
| | 222,924 | 180,033 | 82,208 | 19,767 | 20,542 | 525,474 |
| | 222,924 | 180,033 | 82,208 | 19,767 | 20,542 | 525,474 |
| **Analysis by fund** | | | | | | |
| Unrestricted funds | 222,924 | - | - | - | - | 222,924 |
| Restricted funds | - | 180,033 | 82,208 | 19,767 | 20,542 | 302,550 |
| | 222,924 | 180,033 | 82,208 | 19,767 | 20,542 | 525,474 |

## 6 Trustees

None of the trustees (or any persons connected with them) received any remuneration or benefits from the charity during the year.

## 7 Employees

The average monthly number of employees during the year was:

| 2020 Number | 2019 Number |
|---|---|
| 11 | 6 |

## 7 Employees

| Employment costs | 2020 | 2019 |
|---|---|---|
| | £ | £ |
| Wages and salaries | 337,091 | 231,306 |
| Social security costs | 31,942 | 21,370 |
| Other pension costs | 7,959 | 5,098 |
| | 376,992 | 257,774 |

The number of employees whose employee benefits (excluding employer pension costs) exceeded £60,000 was Nil (2019:Nil)

The total employee benefits of the key management personnel of the charity was £62,250 (2019: £57,000). The amount of contributions recognised in the Statement of Financial Activities in respect of defined contribution pension plans was £7,959 (2019: £5,098). The liability and expense in the accounts are split between restricted and unrestricted funds in line with the salaries of the employees to which the contributions relate.

## 8 Tangible fixed assets

| | Computers |
|---|---|
| | £ |
| **Cost** | |
| At 1 January 2020 | 4,529 |
| At 31 December 2020 | 4,529 |
| **Depreciation and impairment** | |
| At 1 January 2020 | 3,572 |
| Depreciation charged in the year | 610 |
| At 31 December 2020 | 4,182 |
| **Carrying amount** | |
| At 31 December 2020 | 347 |
| At 31 December 2019 | 956 |

**9 Fixed asset investments**

| | Unlisted investments £ |
|---|---|
| **Cost or valuation** | |
| At 1 January 2020 & 31 December 2020 | 1 |
| **Carrying amount** | |
| At 31 December 2020 | 1 |
| At 31 December 2019 | 1 |

**10 Debtors**

| | 2020 £ | 2019 £ |
|---|---|---|
| **Amounts falling due within one year:** | | |
| Other debtors | 3,822 | 5,613 |
| Prepayments and accrued income | 4,621 | 4,621 |
| | 8,443 | 10,234 |

**11 Creditors: amounts falling due within one year**

| | 2020 £ | 2019 £ |
|---|---|---|
| Other taxation and social security | 964 | 191 |
| Trade creditors | - | 8,988 |
| Amounts owed to fellow group undertakings | 3,017 | 3,405 |
| Other creditors | - | 1,185 |
| Accruals and deferred income | 5,382 | 5,382 |
| | 9,363 | 19,151 |

## 12 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

| | | Movement in funds | | | | Movement in funds | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Balance at 1 January 2019 | Incoming resources | Resources expended | Transfers | Balance at 1 January 2020 | Incoming resources | Resources expended | Transfers | Balance at 31 December 2020 |
| | £ | £ | £ | £ | £ | £ | £ | £ | £ |
| Batley and Spen | 69,260 | 90,675 | (82,208) | - | 77,727 | 112,656 | (57,836) | (86,579) | 45,968 |
| Great Get Together | 15,001 | 65,708 | (180,032) | 99,323 | - | 10,321 | (29,784) | 19,463 | - |
| Esmee Fairbairn | - | 40,000 | - | - | 40,000 | 20,000 | (48,911) | - | 11,089 |
| John Ellerman Foundation | 20,065 | - | (20,542) | 477 | - | - | - | - | - |
| Spirit of 2012 | - | 19,984 | (19,767) | - | 217 | 296,296 | (271,271) | (163) | 25,079 |
| GEO | 2,000 | - | - | - | 2,000 | - | (2,000) | - | - |
| Loneliness | (10,037) | - | - | 10,037 | - | - | - | - | - |
| Astra Connection Coalition | - | - | - | - | - | 51,000 | (8,100) | - | 42,900 |
| Joseph Rowntree Reform Trust | - | - | - | - | - | 13,750 | (7,398) | - | 6,352 |
| NESTA Connection Coalition | - | - | - | - | - | 30,000 | (29,039) | (961) | - |
| | 96,289 | 216,367 | (302,549) | 109,837 | 119,944 | 534,023 | (454,339) | (68,240) | 131,388 |

**13 Analysis of net assets between funds**

| | Unrestricted funds 2020 | Restricted funds 2020 | Total 2020 | Unrestricted funds 2019 | Restricted funds 2019 | Total 2019 |
|---|---|---|---|---|---|---|
| | £ | £ | £ | £ | £ | £ |
| Fund balances at 31 December 2020 are represented by: | | | | | | |
| Tangible assets | 347 | - | 347 | 956 | - | 956 |
| Investments | 1 | - | 1 | 1 | - | 1 |
| Current assets/(liabilities) | 232,579 | - | 232,579 | 131,594 | - | 131,594 |
| | 232,927 | - | 232,927 | 132,551 | - | 132,551 |

**14 Ultimate Controlling Party**

The charity is controlled by the trustees.

**15 Related party transactions**

During the year, The Jo Cox Foundation paid costs totalling £388 on behalf of The Jo Cox Foundation Trading Limited, a company in which The Jo Cox Foundation is the sole shareholder. At the year end £3,016(2019: £3,405) was owed to The Jo Cox Foundation Trading Limited.

**16 Subsidiaries**

These financial statements are separate charity financial statements for The Jo Cox Foundation Trading Limited

Registered Office: Living Space, Coral Street, London, SE1 7BE

Details of the charity's subsidiaries at 31 December 2020 are as follows:

| Name of undertaking | Registered office | Nature of business | Class of shares held | % Held Direct | % Held Indirect |
|---|---|---|---|---|---|
| The Jo Cox Foundation Trading Limited | United Kingdom | Book royalties | Ordinary | 100.00 | |

The aggregate capital and reserves and the result for the year of subsidiaries excluded from consolidation was as follows:

| Name of undertaking | Profit/(Loss) | Capital and Reserves |
|---|---|---|
| | £ | £ |
| The Jo Cox Foundation Trading Limited | (388) | 2,332 |

**16 Subsidiaries**

The loss of £388 (2019: profit of £2,347) is stated after a distribution of profits of £nil (2019: £nil) to the Jo Cox Foundation and tax of £nil (2019: £nil). The company has a gross turnover of £nil (2019: £nil).

Investments as at 31 December 2020 relate to the Charity's subsidiary company and are recorded at cost.