

JHAW
(formerly JHASW)

REPORT AND ACCOUNTS
FOR THE YEAR ENDING 14th APRIL 2025

C Management Services
69 Velindre Road
Whitchurch
Cardiff
CF14 2TF

JHAW
FOR THE YEAR ENDED 14th APRIL 2025

CHARITY INFORMATION

Trustees:	Stanley Soffa John Minkes Dr Stephen Waldek Gabriella Brown (from 19 th December 2024) Lynda Maddock (from 27 th October 2024) Nathan Abrams (from 1 st October 2024)
Charitable position:	Registered Charity number 1178852
Governing Document:	CIO Foundation Model dated 20 th June 2018 and amended on 16 th January 2025
Address for correspondence:	6 Moira Terrace Cardiff CF24 0EJ
Independent Examiner:	Paul Burnell ACMI C Management Services 69 Velindre Road CARDIFF CF14 2TF
Bankers:	Lloyds Bank 7 Carter Street Uttoxeter ST14 8HD

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REPORT OF THE TRUSTEES

FOR THE YEAR ENDED 14th APRIL 2025

The trustees present their report and the unaudited financial statements of the charity for the period ended 14th April 2025.

INTRODUCTION

JHAW (also known as The Jewish History Association of Wales, formerly Jewish History Association of South Wales) was formed in June 2018 with the express aim of celebrating, recording and recovering memories of the Jewish community in South Wales. In 2025 the name was amended to reflect its wider reach.

LEGAL STATUS

JHAW is a Charity incorporated under the Charities Act 2011. The Charity number is 1178852.

OBJECTS OF THE CHARITY

The objectives of the Charity are as follows:

To advance the education of the public in the subject of Jewish heritage in Wales, in particular by preserving the tangible and intangible cultural heritage of Jewish communities of Wales, being of historical or educational merit, and the surrounding areas including, but not limited to, historical records, artefacts and oral history and ensuring such records, artefacts and histories are recorded and made available to the public.

FINANCIAL CONTROL

The Charity has a Trustee who is responsible for the recording of income and expenditure and ensuring all grants are properly utilised and the preparation of adequate records to produce annual accounts.

In 2024/25 we received the final payment on our grant from the Wales Council for Voluntary Action and a grant from the Association for Jewish Refugees. The WCVA payment covered the completion of the project to record and preserve the archives of the Cardiff Reform Synagogue and the AJR grant covered the final phases of the project relating to Holocaust Educational materials. A

s in previous years, Cardiff University funded an internship which funded a researcher on a short fixed-term contract. At the end of the financial year, these projects had all come to an end but funding had been received from the Wartski Foundation for a small project in North Wales and we are also seeking to fund other activities. Two of our three staff have remained with us on a voluntary basis until funding is available to resume their employment.

In the light of the planned extension of our work beyond South Wales we have dropped the 'South' from our name and become the Jewish History Association of Wales. This change of name and a revised constitution were approved by the Charity Commission in February 2025.

The charity currently still has two of the original three Trustees, together with Dr Stephen Waldek who was appointed in 2023. In autumn 2024, three new Trustees were appointed: Professor Nathan Abrams, Gabriella Brown and Lynda Maddock. We welcome the new experience and skills they bring to the Trustee group and we hope they will be joined by others in the future.

RISKS POLICY

The major risk identified by the Trustees is the loss of grant funding and charitable donations. To mitigate that risk, the trustees have adopted a reserves policy.

RESERVES POLICY

The Trustees agreed to establish a reserves policy to allow the charity to meet all their running costs should the funding levels fall, or be deferred, and to meet possible contractual obligations, winding up costs and to be given time to find alternative sources of income.

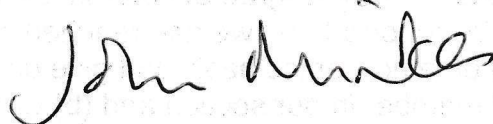
The Trust's policy is not to commit to any expenditure unless a donation or grant in respect of that expenditure is secured.

RESULTS

The results for the year and the charity's financial position at the end of the year are shown in the attached financial statements.

This report is signed on behalf of the Trustees on 29th July 2025 by John Minkes as Trustee

Signed:



INDEPENDENT EXAMINERS REPORT

TO THE TRUSTEES OF JHAW

I report on the accounts of the Trust for the period ended 14th April 2025, which are set out on pages 6 to 9.

Respective responsibilities of trustees and examiner

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

It is my responsibility to:

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

Basis of independent examiner's report

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

Independent examiner's statement

In connection with my examination, no material matters have come to my attention which gives me reasonable cause to believe that in any material respect:

- accounting records were not kept in accordance with section 130 of the Charities Act or
- the accounts do not accord with the accounting records

I have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Paul Burnell

Paul Burnell ACMI

For and on behalf of:

C Management Services (trading name of C Mgmnt Services Ltd)
69 Velindre Road
Cardiff CF14 2TF

Date: 29th July 2025

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RECEIPTS AND PAYMENTS ACCOUNT

FOR THE YEAR ENDED 14th APRIL 2025

	Note	Unrestricted Funds £	Restricted Funds £	Total Funds 2025 £	Total Funds 2024 £
RECEIPTS					
<i>Receipts from generated funds</i>	2	10,828	32,313	43,141	63,013
<i>Receipts from charitable activities</i>		-	-		-
<i>Other receipts</i>		-	-		-
Interest received		-	-		-
Total Receipts		10,828	32,313	43,141	63,013
PAYMENTS					
Charitable activities	3	14,764	42,546	57,310	77,600
Governance costs		245	-	245	245
Total payments		15,009	42,546	57,555	77,845
Net Receipts/(Payments)		(4,181)	(10,233)	(14,414)	(14,832)
Transfers between funds					
Fund balances at 15th April 2023		6,201	12,358	18,559	33,391
Fund balances at 14 th April 2024		2,020	2,125	4,145	18,559

The notes on pages 8-9 form part of these accounts.

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**STATEMENT OF ASSETS AND LIABILITIES
FOR THE YEAR ENDED 14th APRIL 2025**

		2025	2024
		£	£
Current Assets			
Cash at Bank and in Hand		<u>4,385</u>	<u>18,804</u>
		4,385	18,804
Creditors: Amounts falling due within one year	4	<u>(245)</u>	<u>(245)</u>
Net current assets		<u>4,145</u>	<u>18,559</u>
Total assets less current liabilities		4,145	18,559
Net assets		<u><u>4,145</u></u>	<u><u>18,559</u></u>

Funds

General Unrestricted Funds	5	2,020	6,201
Restricted Funds	5	<u>2,125</u>	<u>12,358</u>
		<u>4,145</u>	<u>18,559</u>

The accounts were approved by the Trustees and signed on their behalf on 29th July 2025 by John Minkes as Trustee

Signed:

John Minkes

The notes on pages 8 and 9 form part of these accounts.

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NOTES TO THE ACCOUNTS FOR THE PERIOD ENDED 14th APRIL 2025

1. Accounting Policies

The accounts have been prepared on a receipts and payments basis with a statement of assets and liabilities

2. Incoming Resources

	Unrestricted Funds £	Restricted Funds £	Total 2025 £	Total 2024 £
Voluntary Income				
Grants and Donations				
Cardiff University	-	840	840	4,998
Association of Jewish Refugees	-	18,545	18,545	-
Zachor (Erasmus+)	-	-	-	3,166
Social Enterprise (STOS) Funding	-	-	-	1,194
Sherman Cymru	-	-	-	1,250
Wolfson Foundation	-	-	-	18,545
WCVA	-	10,803	10,803	21,667
Wartski	-	2,125	2,125	-
Rothschild	-	-	-	-
Pencare	4,000	-	4,000	10,620
Other donations	5,388	500	5,888	1,219
Gift Aid claimed	815	125	940	354
	10,828	32,313	43,141	63,013

3. Resources expended

	Unrestricted Funds £	Restricted Funds £	Total 2025 £	Total 2024 £
Governance costs				
Professional fees	245	-	245	245
	245	-	245	245
Cost of Charitable Activities				
<i>Management & Administration Costs</i>				
Project Manager	2,643	27,137	29,780	39,961
Digitisation Officer	590	14,569	15,159	21,239
Oral History Officer	7,256	-	7,256	9,810
	10,489	41,706	52,195	71,010
<i>Premises Costs</i>				
Rent and Rates	300	-	300	660
	300	-	300	660
<i>General Administration Expenses</i>				
Internship	-	840	840	2,470
Subscriptions & Fees	447	-	447	613
Printing	-	-	-	-
Insurance	183	-	183	157
Expensed Equipment	172	-	172	510
Other	2,952	-	2,952	279
Travel	221	-	221	1,901
	3,975	840	4,815	5,930
Total Cost of Charitable Activities	15,009	42,546	57,555	77,845
Total Resources Expended	(4,181)	(10,233)	(14,414)	(14,832)

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NOTES TO THE ACCOUNTS FOR THE PERIOD ENDED 14th APRIL 2025

4. Creditors: amounts falling due within one year

	2025	2024
Creditors	-	-
Accruals	245	245
	245	245

5. Payments to Trustees

No trustee received any remuneration from the charity during the period

6. Analysis of Net Assets Between Funds

	Net Current Assets £	Total £
Unrestricted Funds	2,020	2,020
Restricted Funds	2,125	2,125
	4,145	4,145

7. Fund Balances

	Movement in period	Total £
Unrestricted Funds	(4,181)	2,020
Restricted Funds	(10,233)	2,125
Total Charity Funds	(14,414)	4,145