

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

England & Wales · Charity number 1188268

Details

Status Registered

Legal form CIO

Registered 2020-03-02

Register [View on the Charity Commission register](#)

Contact

Address K V T Business Care Ltd
Unit 1
Chapelton Lodge
East Winch Road
Blackborough End
KING'S L

Phone 01553849849

Email info@jhse.org

Website <https://jhse.org>

Activities

Objects: THE OBJECTS OF THE CIO ARE TO ADVANCE THE EDUCATION OF THE PUBLIC IN THE HISTORY OF BRITISH JEWS AND JEWRY AND PARTICULARLY OF JEWISH COMMUNITIES CONNECTED WITH IT THROUGH THE COURSE OF BRITISH HISTORY ('THE SUBJECT'), WHICH OBJECTS SHALL BE ACHIEVED THROUGH ANY OR ALL OF THE FOLLOWING ACTIVITIES, AS THE TRUSTEES DETERMINE FROM TIME TO TIME: (A) THE PROMOTION AND ORGANISATION OF RESEARCH INTO THE SUBJECT AND THE PUBLICATION OF THE USEFUL RESULTS OF THAT RESEARCH; (B) THE TRANSCRIPTION OF DOCUMENTS AND THE COLLECTION OF MATERIAL RELATING TO THE SUBJECT; (C) THE PUBLICATION OF DOCUMENTS AND MATERIAL, AS WELL AS OF TREATISES, RELATING TO THE SUBJECT; (D) THE MAINTENANCE OF A LIBRARY AND MUSEUM (WHICH SHALL BE ACCESSIBLE TO MEMBERS OF THE PUBLIC ON APPLICATION) FOR THE PRESERVATION OF ARCHIVES OF BRITISH JEWISH CONGREGATIONS AND INSTITUTIONS, AND OF DOCUMENTS, BOOKS, PRINTS, AND OTHER OBJECTS OF JEWISH HISTORICAL INTEREST; (E) THE ORGANISATION OF LECTURES AND THE PUBLICATION OF WORKS ON GENERAL JEWISH HISTORY AND LITERATURE; AND FURTHERMORE (F) THE ARCHIVES OF THE SOCIETY SHALL BE AVAILABLE TO LEARNED SOCIETIES AND EDUCATIONAL INSTITUTES AND THE PUBLIC SHALL BE ENTITLED TO PURCHASE THE SOCIETY'S PUBLISHED PROCEEDINGS AND TREATISES.

Activities: To advance the education of the public in the history of British Jews and Jewry and particularly Jewish communities connected with it through the course of British history.

Classification

- **How:** Provides Advocacy/advice/information, Sponsors Or Undertakes Research
- **What:** Education/training
- **Who:** The General Public/mankind

Geography

- Throughout England

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£40,473	£37,984	-	-
2024-03-31	£40,376	£41,533	-	-
2023-03-31	£30,321	£41,836	-	-
2022-03-31	£36,901	£49,077	-	-
2021-06-30	£41,182	£8,236	-	-

Trustees

Name	Role	Appointed
Dr Anthony Rabin	Chair	2026-03-09
Dawn Waterman		2025-10-27
Gavin Schaffer		2024-09-23
LEWIS OSBOURNE		2025-10-27
Michael Schraer		2021-07-22
Michael Wallace Jackson Crook		2025-10-27
Professor Antony Robin Jeremy Kushner		2024-09-23
Professor Merle Rubin		2024-09-23
Rachel Frankel		2023-10-05
Sasha KE Bolot		2026-03-09

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

England & Wales - Charity number 1188268

Accounts

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Charity Commission Registered no. 1188268

TRUSTEES' REPORT AND FINANCIAL STATEMENTS

for the year ended 31 March 2025



JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

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JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Charity Information

Charity Commission Registered no. 1188268

Bankers

NatWest Bank
Marble Arch Branch
81 Edgware Road
London
W2 2ZQ

Administrators

KVT Business Care
Unit 1 Chapleton Lodge
East Winch Road
Blackborough End
Kings Lynn
PE32 1SF

Independent Examiner

K.J. Maggs B.A, F.C.A.
Hoekman Way
Spalding
Lincs
PE11 3HE

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report

for the year ended 31 March 2025

The trustees present their report with the financial statements of the charity for the year ended 31 March 2025.

Structure, Governance and Management

Charity registration number

The Society is registered as a charity with registration number 1188268.

The Society is commonly known as JHSE.

Governing document

The Jewish Historical Society of England (the 'Society') was founded in 1893 and was governed as an unincorporated charity. On 2 March 2020, the Trustees registered the Jewish Historical Society of England CIO ("JHSE CIO") (a Charitable Incorporated Organisation) with the Charity Commission. Copies of the constitutions of the Society and JHSE CIO are available from the office on request.

The office of the Society and the JHSE CIO is located at Unit 1, Chapleton Lodge, East Winch Road, Blackborough End, Kings Lynn, PE32 1SF.

The governing body of the Society, the Council, all members of which were deemed as Trustees, has now been replaced by a new Board of Trustees of the JHSE CIO. These Trustees now have limited liability.

It is intended that the Society will be wound up once all residual operations, assets and agreements are transferred to the CIO.

Objectives and Activities

The objects of the Society are:

- The organisation of lectures and the publication of works on general Jewish history and literature.
- The promotion and encouragement of research into Jewish history and especially the history of the Jews in the British Isles.
- The transcription of documents and the collection of material relating to the history of Jews in the British Isles.
- The encouragement and support of the foundation and maintenance within the British Isles of libraries, archives and museums, accessible to members of the public, for the preservation of Jewish books, documents, prints, and other objects of Jewish historical interest.

Governance

The management of the JHSE CIO is vested in the Board of Trustees, comprising the President, the Honorary Secretary, the Honorary Treasurer, and not more than eight other Trustees. They are eligible for re-election after a period of three years and may hold a maximum of two consecutive terms in office.

The Board of Trustees during the period was:

President:	Professor Miri Rubin
Hon Secretary, Chair	Caroline Maurice
Hon. Treasurer:	Ian Cobden
Chair of Awards Committee:	Professor Tony Kushner
	Rachel Frankel
	Michael Crook
	Michael Schraer
	Dawn Waterman
	Professor Michael Berkowitz (retired 24 September 2024)

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2025

Structure, Governance and Management (continued)

Training of Trustees

All Trustees have been provided with hard copies of 'The Essential Trustee', and other material regarding Trustee responsibilities and ethics. Charity governance updates are provided to the Board on an adhoc basis

Achievements and Performance

Membership

Membership numbers as at end of July 2025

Adult members	210 (up 13 on the previous year)
Student members	33 (up 16 on the previous year)
Lifetime members	15 (up 2 on the previous year)
Institutional members	35 (Unchanged on the previous year)
Total	293 members

President's Report 2024/25

2024/25 has seen a number of important developments and notable changes. I stepped down as President after five years, and handed over on 1 May 2025 to Gavin Schaffer.

1. Lectures and Events

Here are some of the events organised by your President:

- 31 October 2024, Martin Goodman spoke about his new book The Truth about Herod the Great <https://www.jhse.org/event-details/the-truth-about-herod-the-great>.
- 15 May 2025: John Jay spoke about his work: Ninette's War: <https://www.jhse.org/event-details/ninettes-war-a-jewish-story-of-survival-in-1940s-france>.

Alongside such lectures we also held some events in person on special occasions:

- Miri Rubin planned with Historic Royal Palaces an event at the Tower of London, to commemorate the expulsion of jews from 5 English cities in 1275. This will take place on 30 June 2025 and is open to members.

2. The NGG

This group of doctoral and postdoctoral scholars was founded by the President in April 2020, in the throes of the Covid pandemic. It offers emergent historians a peer groups for mutual learning and intellectual stimulation, as well as a forum for mentoring by the JHSE President and other Trustees, and a body to promote and represent the interests of such scholars. It has regular meetings online for discussions, guest lectures, or book workshops.

In May 2025 at Southampton the NGG hosted it second conference. Alas, I could not attend it due to my duties for the EAJS that day.

A milestone for NGG and JHSE is the successful application to the Rothschild Hanadiv Foundation for funding in support of an NGG administrator. This involved preparatory work with the Foundation, and development of the application with NGG, to which our new President contributed important institutional support from his institution, the Manchester Metropolitan University. It is a pleasure to observe the professionalism of NGG Committee members.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2025

3. Governance – The Advisory Board (AB)

This year has seen a marked emphasis on deeper contact with our AB. The Chair tasked each member of the Board of Trustees to be in touch with members of the AB in order to gain their perspective and gather in suggestions for future activities and improvements. We have recruited several new members to the AB and this has extended the set of skills available to the JHSE as it looks forward.

4. Branches

It has been a pleasure to observe the formation of three new groupings which are developing towards branches.

- **Cambridge**: together with Simon Goldhill, Lea Niccolai, Emily Rose and Theo Dunkelgrun, we have created a Jewish History Hub in Cambridge, with an inaugural meeting in February 2025, attended by some 60 people. We are planning the schedule for 2025/26, and will be hosting interested folk on 29 June at a tea party in Cambridge in order to create coherence and recruit those willing to help run the Branch.
- **Manchester**: As President I initiated over the last three years contacts with the Manchester Jewish Museum with the view towards co-supporting Jewish history events that build on JHSE expertise. Our new President Gavin Schaffer attended spring 2025 events and is the coordinator.
- **North-west London**: Caroline Maurice and Nick Sayers are building up interest and planning the shape of such a Branch. The potential was demonstrated at an excellent event hosted by Caroline at her home for a launch of Nick Sayers' history of the Jews of Lithuania, in conversation with Tony Kushner. <https://www.jhse.org/event-details/book-launch-the-jews-of-lithuania-1>.

5. Public Facing Presence

The President and other members of the Board of Trustees regularly receive queries and requests for aid from historians and interested members of the public. We endeavour to answer swiftly and helpfully. I am regularly supported in this work by Sharon Sales, our administrator, and by David Jacobs whose expertise and good temper are legendary.

Miri Rubin, President /Ex-President of JHSE

June 2025

Treasurer's Report

The results for the charity for the financial year are detailed on pages 13 to 19.

As you will have seen from the accounts, the Charity is still operating at around break-even but this is, in part, due to the benefiting from actively finding high interest bank accounts. However, these rates are falling and we cannot continue to rely on this and must find other sources.

We have successfully applied for and will be receiving a Grant towards the running of the NGG (fully detailed elsewhere) and this is a source of income which must be used more.

We continue to reduce costs and the introduction of the updated website is continuing to help on this including the reduction of administration costs and modifications are continually being made to achieve this. There are costs involved in this exercise but already it has been shown to be more than "paying its way" as can be shown by the reduction in the ongoing website and the administration costs.

Our other major cost is the Annual Journal and this year we have received outside finance to help defray some of the costs. We are showing the full costs of the Journal with any donations being shown as part of our Income. In this manner, the costs can be monitored and can be compared with previous years.

Treasurer's Report (continued)

The main problem, however, continues to be the lack of growth in members and the fall in subscription income. The NGG is one initiative which, even though it is a fairly new scheme, shows signs of growth for the society.

The annual subscription has been maintained at its present level for 4 years and we intend that, despite the rise in inflation, there are no plans for an increase this year.

If anybody has any suggestions as to how we can increase our income then those ideas will be gratefully received.

On a personal note, it is now 10 years since I joined the Society and, in that time, I have seen major changes not only in the structure of the Society but also new Trustees who have brought renewed vigour to the challenge of running the Society. I feel that now that the financial structure (including internal controls and management) is in place a new Treasurer is required to bring new vitality and ideas to the position. I have therefore, with regret, informed my fellow Trustees that I intend to stand down as Treasurer as from the AGM in 2025.

Ian Cobden, Treasurer of the JHSE

June 2025

Branch Report

Overview

The efforts made to restart or initiate new branches by our retiring President Miri Rubin and our Chair Caroline Maurice are now coming to fruition. The North London branch is becoming established, and branches in Manchester and Cambridge are starting to plan programmes for the next few months. The most active branch to June 2025 has been Essex, with Liverpool, Sussex and Israel also contributing to branch activity. South London has also now been able to hold two meetings, both in-person.

The format of meetings post-Covid has now settled down. Whilst it is desirable to have as many meetings as possible in-person or as hybrids, some branches have decided to hold in-person meetings only, and some will hold Zoom only meetings, particularly during the winter months. There is no requirement to hold meetings in a particular format, it is for each branch to decide which arrangement best suits their local circumstances.

Cambridge – Miri Rubin

Initial meetings of a potential organising group have been held, and events in the Autumn Term are in prospect.

Essex – Richard Cohen

The relocation to Chigwell Shul has proved very successful, and our hybrid meetings average 25 guests in person and 20-25 online each meeting.

Recent events included a talk by myself on Balfour, Ed Glinert, an author and walking tour guide, spoke about Jack the Ripper and in June Eleanor Levy spoke about Masada. For our July meeting Mark Smith from the Antiques Roadshow spoke about Jews and the Victoria Cross, and in August Pam Fox will talk about her book "Noshtalgia" ie Blooms of Whitechapel Golders Green and Edgware.

We would like Gavin Schaffer to visit and talk about his book "An Unorthodox History".

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2025

Branch Report (continued)

Israel - Ken Collins

For the last few months we have been meeting in a new venue - the Shir Chadash Synagogue building in Talbiya which has proved more convenient for our members. We have had a few meetings over the last few months. Eli Freidewald spoke about Laurence Oliphant - the influential Christian Zionist who settled on Mount Carmel. Chaya Raphael spoke about From Rags to Riches: the Story of the Barnato Family. Rabbi Meir Salasnik spoke about The First Duke of Sussex (1773-1843) and the Jewish Community.

The new session which will begin after the Chagim will include a visit to the new National Library of Israel, where we will meet librarians involved with aspects of Jewish history in Britain, a talk on the Jews of Gibraltar by former deputy mayor of Jerusalem and daughter of former first minister Sir Joshua Hassan, namely Fleur Nahoum Hassan, and Prof Leslie Wagner on Rabbi Lord Jonathan Sacks: the Making of a Rabbi. Prof Wagner was the first author of an official biography of Rabbi Sacks until he had to resign due to ill health from which he is now making a good recovery.

We will soon have an AGM where it is proposed that the current Chairman, Dr Gabriel Sivan, will hold the honorary position of President and I will take over as Chairman.

Leeds - Meetings/Speakers

The branch continues to join with Milim at Leeds, which is the Leeds version of Jewish Book Week for Virtual meetings. Milim arrange meetings very frequently, and include JHSE in their programme about once a month, although they do not seem to publicise them on the JHSE website. Milim still have mainly Zoom meetings, although recently they have had some in person only meetings.

Liverpool – Ray Morron

The branch held four meetings in the year to March 2025, all in person. In March 2024 we had a talk by Ze'ev Portner on Disraeli, followed in June 2024 by a documentary film 'Expulsion & Memory' about the 1492 expulsion from Spain. In September 2024 Michael Swerdlow spoke on Deane Road cemetery in Liverpool, and in November 2024 we watched another documentary film 'American Jerusalem' about the pioneering Jews of San Francisco.

A talk by Philip Sapiro on leading families of 18th century Liverpool Jewry has been postponed twice, firstly because of an outbreak of Covid at our venue, and secondly due to the venue going into administration. This is now scheduled for 10 August at an alternative venue. We also hope that Gavin Schaffer will come to Liverpool to talk to us about his book and the Society.

Manchester – Gavin Schaffer

Our new President arranged an initial meeting at the Manchester Jewish Museum on 31st July, when Tony Kushner presented his new book, "The Jewish Pedlar – An Untold Criminal History", an imaginative investigation into a historical crime that sheds new light on Jewish history. It is hoped that further meetings will be arranged at the MJM.

North London – Caroline Maurice and Nick Sayers

The North London Branch of the Jewish Historical Society of England has been revived. The idea behind it is that authors will be invited to speak about books they have written on aspects of Jewish history, and these talks will be followed by the opportunity to socialise over drinks and light refreshments. The talks will usually be held in the home of one of our co-chairs, but sometimes in a small public space.

The inaugural event was held in November 2024 at the home of Caroline Maurice when Nick Sayers was in discussion with Tony Kushner about his book called 'The Jews of Lithuania - A Journey through the Long Twentieth century'. A second event was held in July 2025 when Abigail Green and Juliet Carey gave a presentation about their book on Jewish Country Houses.

A programme of talks is being developed with meetings already scheduled for October and November 2025, and a busy start to 2026. The branch also intends to expand its activities by arranging visits to libraries, archives, galleries and other sites of Jewish interest.

Branch Report (continued)

South London – David Rome

We are thrilled to announce that our branch has successfully hosted its first two in-person events, both of which were truly unforgettable experiences for us. The inaugural event took place on December 5th, 2024, and was titled "A British Political Earthquake - From Keith Joseph the First Jewish Conservative Cabinet Minister to Nigel Farage and Nye Bevan." We were honoured to have the esteemed Sir Vernon Bogdanor, Britain's foremost constitutional expert and political scientist, deliver a captivating talk about his latest book. The evening was further enhanced by musical contributions and tea, creating a warm and inviting atmosphere.

The second event, held on March 5th, 2025, was entitled "They took everything apart from my dignity" and featured the remarkable Holocaust survivor Lydia Tischler. As a survivor of Auschwitz and Terezin, Lydia shared her extraordinary story with attendees, answering a multitude of questions and inspiring all who were present. Notably, Lydia is a pioneering child psychotherapist who trained with Anna Freud and, at the remarkable age of 96, continues to supervise and teach. The evening was once again complemented by musical performances and tea, fostering a sense of community and warmth among all in attendance.

Both events were resounding successes, and we are grateful to our host and to have had the opportunity to bring people together to share in these unique and enriching experiences.

We look forward to organising future events soon.

Sussex - Michael Crook

We held five meetings in late 2024, and the first half of 2025, all on Zoom only. We began with a talk from Lola Fraser about Jewish Boy Soldiers of World War 1, followed by Dr Hilary Pomeroy on Salonica: The Rise and Fall of a Jewish City. In January, for Holocaust Memorial Day, Dr Peter Morgan from the Wiener Holocaust Library spoke about Alfred Wiener and recent news from the Library. Professor Tessa Rajak gave us her personal recollections of the Masada Dig 1964-5, and finally our new President Gavin Schaffer was interviewed by our Chairman Michael Crook about his new book – An Unorthodox History – British Jews since 1945.

Planning for the next session has started, unless there are topics or speakers likely to attract significant numbers in person, all talks will be on Zoom only.

Michael Crook, Trustee

July 2025

Report from the Editorial Committee

The most recent issue of the journal (Issue #56) was published in February. This general issue featured articles covering a wide range of topics, spanning from the medieval period through to the twentieth century. It also introduced a new feature, a state-of-the-field article, which in this issue focused on Caribbean Jewish Studies. In addition, the issue included a dedicated section on public history. The publication was successfully released via the UCL Press website and has attracted significant interest, with download activity peaking in April at 20,000 downloads. Cécile is currently developing social media content to further engage JHSE members and enhance the journal's online visibility.

Forthcoming Issue – Special Issue (#57): Jews and the British Empire

The next issue will be a themed edition guest-edited by Elizabeth Imber (Clark University). The editorial team has received seven article submissions for this themed edition and is awaiting one final submission. The special issue will encompass a diverse range of subjects, including studies on the Baghdadi diaspora, Jewish slave trafficking with a case study focused on colonial British India, Italian-Jewish relations in the Mediterranean region, and Mandatory Palestine. Further contributions are anticipated in July as part of the journal's new collaboration with Tulane University, with this edition marking the first to include a section co-edited with Tulane.

The editors have also reviewed and confirmed the process for signing contracts with UCL Press, and all contributing authors will henceforth sign the UCL Press Academic Journal Contributor Agreement. In relation to the use of AI, the journal has agreed to adhere to UCL's official guidelines on AI policy.

**Shirli Gilbert, Co-chair of the Editorial Committee and Advisory Board member:
July 2025**

Report from the Awards Committee

It is pleasing to see the impact of last year's award winners, including, amongst many outstanding projects, the publication of Nudrat Afza's powerful photographs of Bradford Jewry, Kehillah, which has featured at Bradford's City of Culture celebrations, and the Historic Towns Trust map of Jewish Ipswich which is now being widely distributed. It is also pleasing to report that the JHSE oral history project, documenting those who contributed so generously to it, is ongoing with three interviews carried out and two more (from the New Generation Group) scheduled.

This year the Awards Committee recommended eight projects for support that have been confirmed by the Trustees. Two of these will win the David Hyman Prize for work on maritime Jewish communities – a project adding to the extensive Liverpool Jewish database by Philip Sapiro and another community based project on the stained glass windows of Middle Street, Brighton, led by Michelle Ginsburg.

The other six awards include help towards exceptional research trips for two PhD students – Isabelle Murray who is working on the 'Wandering Jew Legend' and Rebecca Harris on Jewish female refugee art in Britain. There are two heritage projects that will be supported – Dean Irwin's medieval Lincoln Jewish walking tour and Hester Abrams of the Willesden Cemetery project who is writing a book based on the remarkable figures buried there. Finally we are supporting the research of two independent scholars – Richard Schofield on the Leon Balk, a Lithuanian Jewish origin photographer, and Micheline Stevens on a grassroots history of the Jewish Education Aid Society.

The awards total £12,309.39 (including £3,402 for the David Hyman Prizes which are funded through the generous bequest given to the JHSE).

I would like to thank my fellow members of the Awards Sub-Committee: Professor Joanna Newman, SOAS); Professor Michael Berkowitz (UCL); Professor Andrea Schatz (Kings, London) and Professor Adam Sutcliffe (Kings, London) for their careful work in selecting the successful applicants.

**Professor Tony Kushner, convenor of the JHSE Awards Sub-Committee and JHSE trustee.
July 2025**

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2025

Reserves policy

Unrestricted reserves

The trustees regularly review reserves, using the Reserves Policy to support both the Financial Strategy and the Strategic Plan. A risk-based approach is used to calculate the optimal amount of reserves that looks at reliability of income, costs for re-organisation of activities, and specific liabilities. Amounts are included for risks we are aware of as well as contingencies to allow the JHSE to cope with unexpected costs and opportunities.

We principally hold reserves to:

- protect the continuity of the JHSE's work against uncertain future income streams;
- provide the capital needed to finance investment in operations;
- provide funds to replace assets;
- to cover for specific liabilities and identifiable risks;
- to allow the JHSE to respond to unexpected opportunities that can further mission;
- to allow the JHSE to meet contractual obligations.

The trustees have set optimal reserves at £13,000 (2024: £14,000 which equates to approximately 3 months unrestricted expenditure. As at 31 March 2025, the level of Free Reserves stands at £14,891 (2024: £14,343), thereby exceeding the optimal reserves figure.

This excess of approximately £1,891 will mean that there is expected to be more funds will be available to be used for Awards.

Restricted reserves

The JHSE has Restricted reserves which relate to income to be used in accordance with specific restrictions imposed by funders as described in note 4 to the financial statements and therefore do not form part of general reserves.

Summary

The Reserves Policy is reviewed annually as part of our internal financial control systems.

Administration

KVT Business Care continues to provide us with professional administrative services. A special thank you must go to Sharon Sales whose calm, efficient and caring approach is always appreciated.

Public Benefit

The trustees declare that they have due regards to the guidance on public benefit issues by the charity commission, all trustees have been provided with the Charity Commission Guidance Notes on Public Benefit and it is the intention to review the guidance with respect to our activities annually.

We maintain that the aims and objectives of the society remain of public benefit. The society organises lectures and publishes works on general Jewish history and encourages new research especially regarding the history of the Jews in the British Isles. Where possible we transcribe documents and make documents accessible to members of the public.

Post Balance Sheet Events

We are not aware of any events subsequent to the balance sheet date which would impact on the financial statements for the year ended 31 March 2025.

We have also identified and reviewed the major risks to which the Society is exposed and systems have been established to mitigate those risks.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2025

Risk management

The Trustees have a duty to identify and review the risks to which the Charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. Trustees must ensure the lasting advancement of the JHSE CIO.

The trustees have a policy that risks are reviewed quarterly by relevant trustees and annually in a formal risk review undertaken by the Chair. The charity considers that there are six categories of risk as shown below and actions are taken to mitigate each of these categories:

- Financial Declining subscriptions, reliance on limited income sources;
- Operational IT failures during online lectures, volunteer availability;
- Governance Trustee succession, lack of engagement from aging membership;
- Compliance GDPR breaches, charity law non-compliance;
- Reputational Inaccurate historical content, poor event delivery;
- Strategic Failure to adapt to digital formats, lack of long-term planning.

The trustees are aware that errors can be made or events happen which had not been predicted but under such circumstances they update the 'Risk register' quarterly, conduct an Annual review of the risk policy and most importantly lessons are learned from incidents to inform future planning.

Principal risks to the JHSE CIO

Financial viability

Although the charity has made a small surplus for the last couple of years this has been the result of reducing the grants that we are able to award. This action has been taken so that the rapidly reducing unrestricted funds has been stopped and therefore reducing the risk of the JHSE CIO becoming unviable.

Our priority has been to increase income and control costs. The increase in fees and payment to attend lectures has provided some revenue, and as a result of improvements to the website, we are seeing a reduction in administration costs. The finance committee are aware that membership numbers have been reducing and thus providing a further risk. They are also reviewing the Investment Policy with a view to securing a better return on investment than at present. The search for a Fundraising Trustee has not yet been successful but remains ongoing.

Risk of Branch Closure

Falling membership and lack of succession planning within the Branches is being addressed enhancing the New Generation Group and encouraging their involvement within the Branches.

Loss of JHSE CIO identity

A distinct identity has been diminished as other organisations undertake similar work. This risk is being addressed by developing unique activities, but also by partnering with other organisations.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2025

Trustees' Responsibilities

Charity law requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the JHSE CIO and of its financial activities for that period. In preparing those financial statements, the Board of Trustees is required to:

- (a) select suitable accounting policies and then apply them consistently;
- (b) make judgements and estimates that are reasonable and prudent;
- (c) state whether applicable accounting standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements;
- (d) prepare the financial statements on the going concern basis unless it is appropriate to presume that the Society will not continue in business.

The Board of Trustees is responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the JHSE CIO and to enable it to ensure that the financial statements comply with the Charities Act 2011 and The Charity (Accounts and Reports) regulations 2008. The Board of Trustees is responsible for safeguarding the assets and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Concluding comments

I would like to express my thanks to the members of the Board of Trustees who have attended many meetings and who have worked so tirelessly over the past year focusing on both administrative and strategic issues affecting the JHSE CIO with great interest, enthusiasm, humour and dedication.

All members of the JHSE benefit from the work of Sharon Sales, of KVT, who is a great asset in undertaking the administration of the Society so effectively and efficiently. I would like to thank her personally and on behalf of the Society.

I would also like to thank the Branch Chairs for their excellent efforts on behalf of the JHSE CIO and the informative lecture programmes they have produced. Once it is safe to do so, I very much look forward to meeting you all in person.

For and on behalf of the board of trustees:

Caroline Maurice
Chair, Board of Trustees

Date: **15 September 2025.**

Independent Examiner's Report
to the Trustees of the
JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

I report to the trustees on my examination of the accounts of the Charity for the year ended 31 March 2025, which are set out on pages 13 to 19.

Responsibilities and basis of report

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination 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 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

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

Dated: **17 September 2025**

K.J. Maggs B.A., F.C.A.
Chartered Accountant
Spalding

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Statement of Financial Activities

for the year ended 31 March 2025

	Unrestricted £	Restricted £	Total 2025 £	Total 2024 £
INCOME AND ENDOWMENTS FROM:				
Donation and Grant income				
Donations and legacies	646	2,000	2,646	5,402
Subscriptions and memberships	15,598	-	15,598	17,614
Trading activities				
Income from sale of books and journals	413	-	413	56
Charitable activities				
Event income	1,805	-	1,805	1,031
Royalties and publications	2,996	-	2,996	3,122
Investment income				
Investment income	11,045	5,970	17,015	13,151
TOTAL INCOME	32,503	7,970	40,473	40,376
EXPENDITURE ON:				
Charitable activities				
Event costs	941	-	941	327
Printing and distribution	308	-	308	1,009
Meeting and lecture expenses	130	-	130	-
Office costs	671	-	671	654
Rent	720	-	720	720
Internet and website costs	2,342	-	2,342	3,699
Website amortisation	242	-	242	241
Awards granted and donations	14,733	2,787	17,520	12,830
Plaque purchased	-	-	-	700
General administration and bookkeeping	6,769	-	6,769	8,015
Support costs				
Bank and similar charges	311	-	311	257
Professional fees	794	-	794	160
Journal editing	3,286	3,000	6,286	11,996
Independent examination	950	-	950	925
TOTAL EXPENDITURE	32,197	5,787	37,984	41,533
Unrealised gains from investments	1,023	4,091	5,114	2,557
NET INCOME	1,329	6,274	7,603	1,400
Reconciliation of funds:				
Brought forward	40,960	378,209	419,169	417,769
Carried forward	42,289	384,483	426,772	419,169

The notes on pages 15 to 19 form part of these accounts.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Balance Sheet

At 31 March 2025

		2025		2024	
Note	£	£	£	£	£
NON-CURRENT ASSETS					
Intangible Fixed Assets					
Website development					
		2,412		2,412	
		(483)		(241)	
		1,929		2,171	
Quoted Investments					
	2	25,469		24,446	
	2	101,878		97,787	
		127,347		122,233	
		129,276		124,404	
CURRENT ASSETS					
		-		3,051	
		302,202		292,639	
		302,202		295,690	
CREDITORS: Amounts falling due within one year					
		(4,706)		(925)	
		297,496		294,765	
NET CURRENT ASSETS					
		426,772		419,169	
TOTAL ASSETS LESS LIABILITIES					
		426,772		419,169	
CHARITY FUNDS					
	3	384,483		378,209	
		42,289		40,960	
		426,772		419,169	

The financial statements on pages 13 to 19 were approved by the Trustees on **15 September 2025** and signed on their behalf by:

Caroline Maurice
Honorary Chair

Ian Cobden
Honorary Treasurer

The notes on pages 15 to 19 form part of these accounts.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements

for the year ended 31 March 2025

1. Accounting Policies

The principal accounting policies adopted in the preparation of the financial statements are set out

The charity is an unincorporated charity registered in England and Wales with the Charity Commission with the registration number 217331. The charity's registered address is Unit 1 Chapleton Lodge, East Winch Road, Blackborough End, Kings Lynn, PE32 1SF.

(a) Basis of preparation of financial statements

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 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on an accrual and a going concern basis and are presented in sterling which is the functional currency of the charity.

(b) Income

All income is included on the Statement of Financial Activities when the charity is legally entitled to the income, the amount can be quantified with reasonable accuracy and it is probable it will be received.

(c) Expenditure

Expenditure is included in the Statement of Financial Activities on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

(d) Gifts in Kind

Gifts in Kind are brought into the accounts where there is either a reasonable estimate of their fair value to the funds or the amount which is actually realised. Where a value cannot be determined, or a reasonable estimate applied, the gift is not included in the Statement of Financial Activities.

(e) Foreign Currency

Foreign currency transactions are initially recognised by applying to the foreign currency amount the spot exchange rate between the functional currency and the foreign currency at the date of the transaction.

Monetary assets and liabilities denominated in a foreign currency at the balance sheet date are translated using the closing rate.

(f) Taxation

The charity is an exempt charity within the meaning of schedule 3 of the Charities Act 2011 and is considered to pass the tests set out in Paragraph 1 Schedule 6 Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

(g) Intangible assets

Intangible assets are amortised on a straight line basis over their useful lives. The useful lives of website development is ten years. Provision is made for any impairment.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2025

1. Accounting Policies (continued)

(h) Investments

Investments are recognised initially at fair value, which is normally the transactions price excluding transaction costs. Subsequently, they are measured at fair value with changes recognised in 'net gains/(losses) in investments' in the Statement of Financial Activities if their fair value can otherwise be measured reliably.

(i) Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The cost of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

(k) Debtors and creditors receivable/payable within one year

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 expenditure.

(l) Going Concern

The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for the next 12 months from authorising the financial statements.

(m) Judgements and key sources of estimation uncertainty

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the amounts reported. These estimates and judgements are continually reviewed and are based on experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period or in the period of the revision and future periods if the revision affects both current and

The following judgements have been made in the process of applying the above accounting policies that have had the most significant effect on amounts recognised in the financial

Cut off - The only estimation applied in these accounts regarding cut off is concerning accruals and prepayments where an estimation of the costs relating to the relevant period were applied when relating to a different period.

2. Investments

Investments are now segregated into Unrestricted Fund Investments and Restricted Fund Investments. All are in special charity funds administered by Schroders.

	Unrestricted £	Restricted £
Market value at 1 April 2024	24,446	97,787
Unrealised investment gains	<u>1,023</u>	<u>4,091</u>
Market value at 31 March 2025	<u>25,469</u>	<u>101,878</u>
Historical cost at 31 March 2025	<u>25,000</u>	<u>25,000</u>

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2025

3. Restricted Funds

Movement in Resources

2025

	Balance at 1 April 2024 £	Incoming £	Outgoing £	Unrealised gains £	Balance at 31 March 2025 £
Stern Family Charitable Trust Fund	1,000	2,000	(3,000)	-	-
Prize Funds	2,787	-	(2,787)	-	-
Audrey G. Machin Fund	5,000	-	-	-	5,000
Arthur & Jessie Barnett Memorial Fund	7,074	-	-	-	7,074
Gustave Tuck Memorial Fund	362,348	5,970	-	4,091	372,409
	<u>378,209</u>	<u>7,970</u>	<u>(5,787)</u>	<u>4,091</u>	<u>384,483</u>

2024

	1 April 2023 £	Incoming £	Outgoing £	Unrealised gains £	Balance at 31 March 2024 £
Stern Family Charitable Trust Fund	1,000	-	-	-	1,000
Prize Funds	15,557	-	(12,770)	-	2,787
Audrey G. Machin Fund	5,000	-	-	-	5,000
Arthur & Jessie Barnett Memorial Fund	7,074	-	-	-	7,074
Gustave Tuck Memorial Fund	356,628	3,674	-	2,046	362,348
Plaque Fund	-	700	(700)	-	-
	<u>385,259</u>	<u>4,374</u>	<u>(13,470)</u>	<u>2,046</u>	<u>378,209</u>

Allocation of funds

2025

	Fixed Assets £	Cash at bank and in hand £	Other net assets £	Total £
Restricted Funds	101,878	282,605	-	384,483
Unrestricted Funds	27,398	19,597	(4,706)	42,289
	<u>129,276</u>	<u>302,202</u>	<u>(4,706)</u>	<u>426,772</u>

2024

	Fixed Assets £	Cash at bank and in hand £	Other net assets £	Total £
Restricted Funds	97,787	280,422	-	378,209
Unrestricted Funds	26,617	12,217	2,126	40,960
	<u>124,404</u>	<u>292,639</u>	<u>2,126</u>	<u>419,169</u>

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2025

4. Description of Restricted Funds

The Stern Family Charitable Trust monies were donated initially for the 130th Anniversary celebrations. However, this was felt to be excessive for this purpose and therefore the donors have been approached in order to discuss the use of the funds for the JHSE Journal.

The Gustave Tuck Collection is a collection of silver and other artefacts. Part of the collection is on long-term loan with the Jewish Museum and stored with Queens Fine Art of Wells Street, London. The rest was sold by auction in New York in December 2012. The net sales proceeds have been included in Restricted Funds under the heading of the Gustave Tuck Memorial Fund and part of the funds have been invested with Schroder Unit Trust Ltd. Under Charity Commission guidelines in respect of museum artefacts no value has been attributed to the Collection, and these are consequently not included in the balance sheet. These funds are used to provide grants to individuals carrying out research into areas of Jewish History, particular those related to the United Kingdom.

Sussex Police donated £700 for the acquisition of a plaque. This fund was completely generated and used within the year.

5. Trustee's Remuneration and Expense

No trustee received any remuneration or benefits during the current year or the previous year.

Total expenses as reimbursed for costs of Council Meetings and for visits to branches of £nil were paid to no trustees.

The charity is controlled by the trustees as a body and no individual does or could exert control.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2025

6. Statement of Financial Activities - Fund Comparatives

	Unrestricted Funds £	Restricted Funds £	Total 2024 £
INCOME AND ENDOWMENTS FROM:			
Donation and Grant income			
Donations and legacies	4,702	700	5,402
Subscriptions and memberships	17,614	-	17,614
Trading activities			
Income from sale of books and journals	56	-	56
Charitable activities			
Event income	1,031	-	1,031
Royalties and publications	3,122	-	3,122
Investment income			
Investment income	9,477	3,674	13,151
TOTAL INCOME	36,002	4,374	40,376
EXPENDITURE ON:			
Charitable activities			
Event costs	327	-	327
Printing and distribution	1,009	-	1,009
Office costs	654	-	654
Rent	720	-	720
Internet and website costs	3,699	-	3,699
Website amortisation	241	-	241
Awards granted and donations	60	12,770	12,830
Plaque purchased	-	700	700
General administration and bookkeeping	8,015	-	8,015
Support costs			
Bank and similar charges	257	-	257
Professional fees	160	-	160
Journal editing	11,996	-	11,996
Independent examination	925	-	925
TOTAL EXPENDITURE	28,063	13,470	41,533
Unrealised gains from investments	511	2,046	2,557
NET INCOME / (EXPENDITURE)	8,450	(7,050)	1,400
Funds brought forward	32,510	385,259	417,769
Funds carried forward	40,960	378,209	419,169

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

England & Wales - Charity number 1188268

Accounts

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Charity Commission Registered no. 1188268

TRUSTEES' REPORT AND FINANCIAL STATEMENTS

for the year ended 31 March 2024



JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

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JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Charity Information

For the year ended 31 March 2024

Bankers

NatWest Bank
Marble Arch Branch
81 Edgware Road
London
W2 2ZQ

Administrators

KVT Businesscare Ltd
Unit 1 Chapleton Lodge
East Winch Road
Blackborough End
Kings Lynn
Norfolk
PE32 1 SF

Independent Examiner

K J Maggs B.A, F.C.A.
Hoekman Way
Spalding
Lincs
PE11 3HE

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report For the year ended 31 March 2024

The Trustees present their report with the financial statements of the charity for the year ended 31 March 2024.

Structure, governance and management

Charity registration number

The society is registered as a charity with registration number 1188268
The society is commonly known as the JHSE.

Governing documents

The Jewish Historical Society of England was founded in 1893 and was governed as an unincorporated charity. On 2 March 2020, the Trustees registered the Jewish Historical Society of England CIO ("JHSE CIO" or the "Society") (a Charitable Incorporated Organisation) with the Charity Commission. Between that date and March 2021, operations of the Jewish Historical Society of England were transferred to the JHSE CIO, in order to enjoy the benefits of incorporation. Copies of the constitutions of the Society are available from the office on request.

The office of the JHSE is located at Unit 1, Chapleton Lodge, East Winch Road, Blackborough End, Kings Lynn, PE32 1SF.

The governing body of the JHSE CIO, the Council, all members of which were deemed as Trustees, has now been replaced by a Board of Trustees. These Trustees now have limited liability. There is also an Advisory Board, comprising 31 former Council members, former trustees and others who are interested in supporting the activities and future of the JHSE CIO.

Objects and Activities

The objects of the Society are:

- The organisation of lectures, events and the publication of works on general Jewish history and literature.
- The promotion and encouragement of research into Jewish history and especially the history of the Jews in the British Isles.
- The transcription of documents and the collection of material relating to the history of Jews in the British Isles.
- The encouragement and support of the foundation and maintenance within the British Isles of libraries, archives and museums, accessible to members of the public, for the preservation of Jewish books, documents, prints, and other objects of Jewish historical interest.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Governance

The management of the JHSE CIO is vested in the Board of Trustees, comprising the President, the Honorary Secretary, the Honorary Treasurer, and not more than eight other Trustees. They are eligible for re-election after a period of three years and may hold a maximum of two consecutive terms in office.

The Board of Trustees during the period was:

President:	Professor Miri Rubin
Hon. Secretary, Chair:	Caroline Maurice
Hon. Treasurer:	Ian Cobden
Chair of Awards Committee:	Professor Tony Kushner
	Rachel Frankel
	Michael Crook
	Michael Schraer
	Dawn Waterman
	Michael Berkowitz

Training of Trustees

All Trustees have been provided with hard copies of 'The Essential Trustee', and other material regarding Trustee responsibilities and ethics. The Chair attended a workshop for Trustees hosted by the Jewish Volunteer network in November 2023. Charity governance updates are provided to the Board on an adhoc basis.

Membership

Membership numbers as at end March 2024		Membership numbers at end July 2023
Adult members	175	197
Student members	10	17
Lifetime members	14	13
Institutional members	36	35
NGG members	15	-
Total 250 members		Total 262 members 2023

President's Report 2023/2024

This year has been overshadowed by the events of 7 October 2024, which has seen many members preoccupied by the arising tragedies and their effects. These events have also affected relations between Jews and their neighbours in some parts of the UK, while social media have sown misinformation as well as abuse of Jews and their history. It was impossible for those interested in Jewish history not to be affected. The JHSE has sought to communicate with clarity and interest in these troubled times. I have done so by writing to members regularly, and by offering an interesting programme of events.

Events

2023/24 was also our 130th anniversary year, with a rich series of events – in person and online – some of which had to be delayed or cancelled due to the difficulties of travel for Israeli scholars. But when we met we heard interesting speakers and had lively debates. Here are some of the events organised by your President:

- A Visit to the Parkes Institute, University of Southampton, 9 October 2023
- Luke Devine, 'Amy Levy and the "Jewish Literary Complex"', 18 January 2024
- Julie Kalman, "'The Assassination of the King of Algiers": Trading Jews and the Napoleonic Mediterranean', 25 January 2024
- Jon Silverman, 'UK Law and Nazi Collaborators: the Failure of Justice', 28 March 2024
- Harry Freedman, 'Shylock's Venice', 11 April 2024
- Andrew Whitehead, 'The Siege of Sidney Street and the Jewish East End Anarchist Movement', 16 May 2024

Alongside these regular lectures we also held some events in person on special occasions:

- Miri Rubin and Simon Schama on a panel 'What is Jewish History Now?', Jewish Book Week, 3 March 2024
- Miri Rubin at the Tower of London, Jewish Medieval History at the Tower of London', 30 April 2024

We also celebrated in Brighton the 200th anniversary of the Brighton Hebrew Congregation with a walk, lectures, and communal lunch on 20 May 2024, all organised by the Sussex Branch led by Michael Crook

The NGG

This group of doctoral and postdoctoral scholars was founded by the President in April 2020, in the throes of the Covid pandemic. It offers emergent historians a peer groups for mutual learning and intellectual stimulation, as well as a forum for mentoring by the JHSE President and other Trustees, and a body to promote and represent the interests of such scholars. It has regular meetings online for discussions, guest lectures, or book workshops.

In May 2024 at Queen Mary University of London the NGG hosted their first conference. I had the pleasure of attending some of the sessions. The papers were innovative and rigorous, and members – from the UK and abroad – discussed them in a collegial manner.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Governance

During the last year we have had a number of sessions to discuss long-term strategy and ways of increasing the JHSE's resilience. We were fortunate to be guided in our deliberations by Michelle Shepard Barron – now member of our Advisory Board – an expert in fundraising and public relations. We held a Meet and Greet meeting in August 2024 where new members - from finance, the law, public history, and the museums world – were introduced to each other and to the issues facing the JHSE.

We have also extended the areas of expertise represented on our Board of Trustees, to include new Trustees that represent the membership across the country, and a variety of experience and career stages.

Public Facing Presence

The President and other members of the Board of Trustees regularly receive queries and requests for aid from historians and interested members of the public. We endeavour to answer swiftly and helpfully. I am regularly supported in this work by Sharon Sales, our administrator, and by David Jacobs whose expertise and good temper are legendary.

It is a pleasure to work with all members of the Board of Trustees. We are all volunteers, and some of us are still in full time employment, yet every Trustees responds swiftly and executes their tasks effectively. It is an honour and a delight to work with you all, under the firm and intelligent coordination of Caroline Maurice, our Chair.

Miri Rubin, President of JHSE

August 2024

Treasurer Report

As you will have seen from the accounts, the Charity is still operating at an annual loss (before the grants of the Awards). The Trustees are trying to reduce costs, and the introduction of the updated website is helping to achieve this. There are costs involved in this upgrade, but we hope that these costs will continue to help reduce the other, especially the administration, costs. Our other major cost is the 'Annual Journal' and the Trustees are looking at ways in which these costs can be reduced.

The main problem, however, is the lack of growth in subscription income. You will have read elsewhere in these Statements that the number of subscribers to the Society is falling. Again, the Trustees are looking at ways to increase membership and income. The annual subscription has been maintained at its present level for 3 years and we intend that, despite the rise in inflation, there will be no increase this year.

The reason for not needing an increase at this time is that we have managed to take advantage of the high interest rates so that we have placed our surplus funds on term deposit and have received a significant amount of interest. Of course, as interest rates decrease so will this "windfall" which makes the sourcing of extra income even more urgent.

We are looking for ways of increasing our income and would appreciate your suggestions.

Ian Cobden, Treasurer of the JHSE

August 2024

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

BRANCH REPORT

Overview

As was reported a year ago, the most active branch to June 2024 has been Essex, with Leeds, Liverpool, Sussex and Israel also contributing to branch activity. South London has aspirations to restart meetings with other South London cultural groups.

No progress has been made in restarting the branch in Herts and Middlesex. The President is working to restart the branch in Manchester, and the possibility of a Cambridge branch has also been mentioned. These should be high priority for the Society in the next few months.

The format of meetings is still proving problematical post-Covid. Whilst it is desirable to have as many meetings as possible as hybrids, some attempts at holding hybrid meetings have resulted in poor attendances, and thus it is likely that some branches will hold Zoom only meetings, particularly during the winter months.

Cambridge - The President has been having discussions with local historians with a view to the possibility of creating a Cambridge Branch.

Essex – Richard Cohen - We held 14 meetings in the last 15 months, all hybrid. Average attendances were 12 in person 20 online. Meetings cost £20 for hall hire, £25 vouchers for speaker and £7.50 for refreshments. We have found that the JHSE Zoom technology is not as good as it could be, JHSE are aware.

Numbers have fallen away sharply recently, so we hope that a relocation to Chigwell Shul and some big names will rejuvenate the Branch.

Israel - Ken Collins - The branch has continued to meet regularly over the past session with a hiatus after the events of October 7th. However, we decided to go ahead with a programme of meetings from January. The best attended was a talk by Shmuel (Lawrence) Becker and his work on the Marks and Spencer files held at the Central Zionist Archives. These papers show the deep involvement of the M&S leadership in supporting Jewish refugees from Nazi Europe before, during and after the War. More recently Prof David Newman gave a talk on the Asifa - the meeting of provincial rabbis in Leeds in 1912.

We have had some problems with the current premises because of local parking problems and have been looking at alternative venues in Central Jerusalem. We continue to sell copies of our new book of essays *'Out of Zion'*, edited by Gabriel Sivan and me, based on presentations to the Society branch in recent years, which was launched recently. At the launch, one of the contributors, Elkan Levy gave an illustrated account of historic Anglo-Jewish memorabilia. The book sells for NIS50 (£12.50) and books are available at meetings or by arrangement from myself. So far there have been no sales in the UK and we would welcome someone arranging book sales. I would be able to bring some copies with me when I visit in December.

We will soon have an AGM where it is proposed that the current Chairman, Dr Gabriel Sivan, will hold the honorary position of President and I will take over as Chairman.

Herts and Middx – Not currently active

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Leeds - Meetings/Speakers The branch continues to join with Milim at Leeds, which is the Leeds version of Jewish Book Week for Virtual meetings. Milim arrange meetings very frequently and include JHSE in their programme about once a month, although they do not seem to publicise them on the JHSE website. Milim still have mainly Zoom meetings, although recently they have had some in person only meetings.

Liverpool – Ray Morran - We held 6 meetings during that period, one was hybrid, two were in person & three were film documentaries. We have access to a small cinema at our local Jewish care home. Our average attendance is 25. Our main expense is the use of a room and provision of refreshments at the care home. We make a donation and ensure that we don't make a loss. One of our speakers travelled from the south. We paid his train fare of £83.

Our hybrid meetings were poorly supported nationally, the most recent had only two watching. Our view is that this format does not work well for either those in the room or watching on Zoom. As far as I can make out, the recordings aren't available on the website. We have no plans for any further hybrid meetings.

Manchester – The President is still seeking to reactivate the branch, possibly with meetings at the Jewish Museum.

South London – David Rome –.No meetings have been held, but I have started a conversation with Dr Margaret Brearley about re launching the group and will be in touch when I have something concrete to report regarding JHSE affairs.

Sussex – Michael Crook - We held our usual six meetings in late 2023, and the first half of 2024, three of which were hybrid, and three on Zoom only. We began with a Zoom talk from a local speaker on Jewish sailors in Nelson's Navy, and this was followed by a special meeting 'Jewish Kyiv and the Cantonists'. This comprised a short film about the Cantonists (Jewish boys kidnapped into the Czars army) in 19th century Russia, based on a family history, which was preceded by a talk by the Chairman about Jews in Kyiv in the mid nineteenth century. Two zoom meetings about The Sussex Digital Holocaust Education Project, and Stephen Sondheim followed in January and February. In April, we were able to secure the exhibition 'Country Houses, Jewish Homes' from Oxford University for two days, and Professor Abigail Green then spoke to us at Ralli Hall and on Zoom about the project. Finally, in May, as part of the celebrations of 200 years of the Brighton Hebrew Congregation, a number of JHSE Trustees and others joined us at the historic Middle Street synagogue in Brighton, followed by a short tour of sites in the town with Jewish connections. An afternoon session at the new Jewish hub at BNJC. available on Zoom, heard from the Chairman about the history of the Congregation, and Professor Tony Kushner about other locations of Jewish interest across Sussex in the last 250 years and more.

Planning for the next session has started, unless there are topics or speakers likely to attract significant numbers in person, all talks will be on Zoom only.

Michael Crook, Trustee
August 2024

Report from the Editorial Committee

Since taking over the editorship of *Jewish Historical Studies* in 2022, the new editors have worked to expand its scope and reach. The new subtitle, *A Journal of English-Speaking Jewry*, reflects the journal's broadened horizons, as it now explores and documents the historical experience of Jews across the English-speaking Jewish world, rather than being limiting to the geographic boundaries of England itself.

The first issue under their editorship, Issue 55, was a special issue focused on South African Jewry. It was rich in high quality submissions and was published in January 2024. It explored topics including intersections of racism and antisemitism, the Yiddish press, the political dynamics of Zionist youth movements during apartheid, the cultural and religious evolution of the post-war community, and the origins of the religious revival that transformed South African Jewry. The issue was made up of seven articles, a reflection on the state-of-the-field and seven responses to the state-of-the-field piece, two additional reflection pieces, and seven book reviews.

Examples of article titles include:

Special Issue: Jews in South Africa		
<i>The Yiddish press and the making of South African Jewry in the British world: exclusion, libel, and Jewish nationalism, 1890–1914</i>		
WILLIAM PIMLOTT		I
<i>The intertwining of antisemitism and racism in modern South Africa, c. 1880–1939</i>		
REBECCA HODES & RODNEY H. REZNEK		27
<i>The other radicals: Zionist-socialist youth in apartheid South Africa, 1948–1970</i>		
ASHER LUBOTZKY		51
<i>Community cookbooks: a new lens on postwar South African Jewish culture</i>		
GAVIN BEINART-SMOLLAN		84
<i>The limits of communal dissent: the rise and fall of the Kollel Yad Shaul as South Africa's premier outreach organization</i>		
DAVID FACHLER		106

The editors are currently working on Issue 56, expected for publication in January 2025. This is a general issue and will contain articles on topics including British Jewish Chaplaincy, Christian relief work in the aftermath of the Holocaust, poverty and welfare among London's Sephardic community 1762-1802, and Papal Legate in medieval England. There will also be a state-of-the-field piece on Jews and the Caribbean. In addition, there will be a public history reviews section which will become a regular feature of the journal's offerings in the future.

The editors are simultaneously laying the groundwork for Issue 57 (2026) which will be a special issue on the topic of Jews and the British Empire. Dr Elizabeth Imber (Clark University) has agreed to act as guest-editor for this issue and the Call for Proposals has already yielded a healthy number of responses.

The editors are aware that finances are a concern to the JHSE and have been working with Tony Kushner to explore possible ways in which these can be mitigated. Following a meeting with Taylor & Francis they have concluded that moving to a large academic publisher is not currently feasible. They also explored the possibility of moving to the UCL online system, but this would also not give any financial advantage. Nevertheless, they continue to explore possible alternative pathways and partnerships.

Shirli Gilbert, Co-chair of the Editorial Committee and Advisory Board member: July 2024

Report from the Awards Committee

The JHSE awards committee have been overseeing the programme for around the past 5 years. It is pleasing to report that the number of applications has been slowly growing, taking off in the last round – 34 applicants applied and overall, the standard was high. The increase can be attributed to three factors – that demand was suppressed during Covid; the growth of work in our field; and better advertising of the scheme.

Funds - A couple of years ago we cut the overall amount we award per annum from £25k to £20k and from a maximum of £5k to a maximum of £4k per successful applicant. In fact, we have distributed less than £20k this past few years. Although it is a fixed amount and will support only a further 3 or 4 awards, we have been in a privileged position of having a separate award (the David Hyman Prize) for work on port Jews up to £5k per successful applicant. So far awards have been given for work on Bristol Jews and Cork Jews for this prize. *Risks* that the JHSE is no longer able to fund these awards.

Scope - One advantage of having the same team on the awards committee has been to see the trends. We would like, with the approval of the Trustees and the Advisory Committee, to suggest refining the scope of what we will consider or confirming what we are presently prioritising.

- i. That preference will be given to early career scholars above those who are well-established and might have access to other funding schemes.
- ii. That we continue to encourage community history projects, including exhibitions, collections, websites and publications (increasingly our awards have gone to such applications).
- iii. For early career scholars (ECRs) and those outside the Higher Education world, we will consider modest help towards publication costs.
- iv. That we will consider funding specific research costs for PhD students but will not pay for fees.
- v. We will not consider funding research assistants.
- vi. We will emphasise further that there should be some public outcome of the awards which will benefit JHSE members (this could be in the form of a lecture, a publication, exhibition etc etc).

Summary: we believe the awards scheme has been a very successful and fruitful one with a range of projects supported which have acknowledged our support. On the one hand it is exactly what the JHSE should be doing and is helping to support community projects and ECRs. On the other, even with prudence from the awards committee (which the above notes on scope will help tighten even further), it is a major annual cost to the JHSE.

Solution? It has potential as a specific fund-raising goal which might be considered.

Tony Kushner, Awards Committee Chair and Trustee - July 2024

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

JHSE Communications Report

Website <https://www.jhse.org/>

Website content is updated on a regular basis and features news about our forthcoming events as well as prominent requests to donate and join. Members have the option to access their membership status, with the facility to make changes.

Member communications

JHSE members and people who have opted in to the JHSE newsletter via the website receive a monthly email communication from the JHSE President. This contains updates on our events, branches, and general activity as well as general news about Anglo-Jewish history. Newsletter text is posted on the website and is accessed by non-members as well.

Facebook <https://www.facebook.com/AngloJewishHistory>

The account has nearly 3000 members. Aspects of Jewish history are discussed throughout the year. Promotion of our events on the platform has encouraged people to attend JHSE meetings and talks. There is lively discussion on the platform, particularly related to JHSE talks and the books and authors featured in JHSE events.

Twitter <https://twitter.com/JHSEngland>

The accounts has nearly 1.9K followers.

Posts about JHSE news, people and events go out on a regular basis. The account also re-posts key information from likeminded organisations such as BIAJS, the Parkes Institute, the British Board of Deputies, Jewish museums of Manchester and London, from major followers involved in Anglo-Jewish history, and news from specialised accounts focusing on history-related subjects such as the British Jews of WW2 and WW1, medieval Jewish history, Jewish social history, European and International Jewish history, and other aspects of Jewish history related to the arts, sports, politics, literature and religious practice.

Posts receive an average of 130 impressions per day and roughly 7% of JHSE-originated posts receive a reaction: a 'like', a comment or a re-post.

Michael Schraer and Rachel Frankel, Trustees

July 2024

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Administration

KVT Business Care continues to provide us with professional administrative services. A special thank you must go to Sharon Sales whose calm, efficient and caring approach is always appreciated.

Public Benefit

The Trustees declare that they have due regard to the guidance on public benefit issues by the Charity Commission. All Trustees have been provided with the Charity Commission Guidance Notes on Public Benefit and it is the intention to review annually the guidance with respect to our activities.

We maintain that the aims and objectives of the JHSE CIO remain of public benefit. It organises lectures and publishes works on general Jewish history and encourages new research especially regarding the history of the Jews in the British Isles. Where possible we transcribe documents and make documents accessible to members of the public.

Financial Review

The amount awarded for grants to support academic work in various fields of Jewish history continue to exceed investment income from the restricted fund. This is a deliberate policy to invest in the future of Jewish history research.

Trustees' Responsibilities

Charity law requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the JHSE CIO and of its financial activities for that period. In preparing those financial statements, the Board of Trustees is required to:

- (a) select suitable accounting policies and then apply them consistently;
- (b) make judgements and estimates that are reasonable and prudent;
- (c) state whether applicable accounting standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements;
- (d) prepare the financial statements on the going concern basis unless it is appropriate to presume that the JHSE CIO will not continue in business.

The Board of Trustees is responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the JHSE CIO and to enable it to ensure that the financial statements comply with the Charities Act 2011 and The Charity (Accounts and Reports) regulations 2008. The Board of Trustees is responsible for safeguarding the assets and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

For and on behalf of the board of trustees:

Caroline Maurice

Chair, Board of Trustees

Date: **19 October 2024**

Independent Examiner's Report
to the Trustees of the
JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

I report to the trustees on my examination of the accounts of the Charity for the year ended 31 March 2024, which are set out on pages 14 to 20.

Responsibilities and basis of report

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination 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 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

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

Dated: **22 October 2024**

K.J. Maggs B.A., F.C.A.
Chartered Accountant
Spalding

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Statement of Financial Activities

for the year ended 31 March 2024

	Unrestricted £	Restricted £	Total 2024 £	Total 2023 £
INCOME AND ENDOWMENTS FROM:				
Donation and Grant income				
Donations and legacies	4,702	700	5,402	299
Subscriptions and memberships	17,614	-	17,614	19,008
Trading activities				
Income from sale of books and journals	56	-	56	1,861
Charitable activities				
Event income	1,031	-	1,031	781
Sundry income	-	-	-	200
Royalties and publications	3,122	-	3,122	3,031
Investment income				
Investment income	9,477	3,674	13,151	5,141
TOTAL INCOME	36,002	4,374	40,376	30,321
EXPENDITURE ON:				
Charitable activities				
Event costs	327	-	327	-
Printing and distribution	1,009	-	1,009	592
Office costs	654	-	654	763
Rent	720	-	720	720
Internet and website costs	3,699	-	3,699	3,187
Website amortisation	241	-	241	-
Awards granted and donations	60	12,770	12,830	19,712
Plaque purchased	-	700	700	-
General administration and bookkeeping	8,015	-	8,015	9,148
Support costs				
Bank and similar charges	257	-	257	362
Professional fees	160	-	160	107
Consultancy fees	-	-	-	125
Journal editing	11,996	-	11,996	7,912
Independent examination	925	-	925	1,008
TOTAL EXPENDITURE	28,063	13,470	41,533	43,636
Unrealised gains / (losses) from investments	511	2,046	2,557	(3,789)
Realised gains from foreign exchange	-	-	-	61
NET INCOME / (EXPENDITURE)	8,450	(7,050)	1,400	(17,043)
Reconciliation of funds:				
Brought forward	32,510	385,259	417,769	434,812
Carried forward	40,960	378,209	419,169	417,769

The notes on pages 16 to 20 form part of these accounts.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Balance Sheet

At 31 March 2024

		2024		2023	
Note	£	£	£	£	£
NON-CURRENT ASSETS					
Intangible Fixed Assets					
Website development					
		2,412		2,412	
		(241)		-	
		2,171		2,412	
Quoted Investments					
	2	24,446		23,935	
	2	97,787		95,741	
		122,233		119,676	
		124,404		122,088	
CURRENT ASSETS					
		3,051		-	
		292,639		296,581	
		295,690		296,581	
CREDITORS: Amounts falling due within one year					
		(925)		(900)	
		294,765		295,681	
NET CURRENT ASSETS		419,169		417,769	
TOTAL ASSETS LESS LIABILITIES		419,169		417,769	
CHARITY FUNDS					
	3	378,209		385,259	
		40,960		32,510	
		419,169		417,769	

The financial statements on pages 14 to 20 were approved by the Trustees on **19 October 2024** and signed on their behalf by:

Caroline Maurice
Honorary Chairman

Ian Cobden
Honorary Treasurer

The notes on pages 16 to 20 form part of these accounts.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements

for the year ended 31 March 2024

1. Accounting Policies

The principal accounting policies adopted in the preparation of the financial statements are set out

The charity is an unincorporated charity registered in England and Wales with the Charity Commission with the registration number 217331. The charity's registered address is Unit 1 Chapleton Lodge, East Winch Road, Blackborough End, Kings Lynn, PE32 1SF.

(a) Basis of preparation of financial statements

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 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on an accrual and a going concern basis and are presented in sterling which is the functional currency of the charity.

(b) Income

All income is included on the Statement of Financial Activities when the charity is legally entitled to the income, the amount can be quantified with reasonable accuracy and it is probable it will be received.

(c) Expenditure

Expenditure is included in the Statement of Financial Activities on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

(d) Gifts in Kind

Gifts in Kind are brought into the accounts where there is either a reasonable estimate of their fair value to the funds or the amount which is actually realised. Where a value cannot be determined, or a reasonable estimate applied, the gift is not included in the Statement of Financial Activities.

(e) Foreign Currency

Foreign currency transactions are initially recognised by applying to the foreign currency amount the spot exchange rate between the functional currency and the foreign currency at the date of the transaction.

Monetary assets and liabilities denominated in a foreign currency at the balance sheet date are translated using the closing rate.

(f) Taxation

The charity is an exempt charity within the meaning of schedule 3 of the Charities Act 2011 and is considered to pass the tests set out in Paragraph 1 Schedule 6 Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

(g) Intangible assets

Intangible assets are amortised on a straight line basis over their useful lives. The useful lives of website development is ten years. Provision is made for any impairment.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2024

1. Accounting Policies (continued)

(h) Investments

Investments are recognised initially at fair value, which is normally the transactions price excluding transaction costs. Subsequently, they are measured at fair value with changes recognised in 'net gains/(losses) in investments' in the Statement of Financial Activities if their fair value can otherwise be measured reliably.

(i) Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The cost of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

(k) Debtors and creditors receivable/payable within one year

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 expenditure.

(l) Going Concern

The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for the next 12 months from authorising the financial statements.

(m) Judgements and key sources of estimation uncertainty

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the amounts reported. These estimates and judgements are continually reviewed and are based on experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period or in the period of the revision and future periods if the revision affects both current and future periods.

The following judgements have been made in the process of applying the above accounting policies that have had the most significant effect on amounts recognised in the financial statements:

Cut off - The only estimation applied in these accounts regarding cut off is concerning accruals and prepayments where an estimation of the costs relating to the relevant period were applied when relating to a different period.

2. Investments

Investments are now segregated into Unrestricted Fund Investments and Restricted Fund Investments. All are in special charity funds administered by Schroders.

	Unrestricted £	Restricted £
Market value at 1 April 2023	23,935	95,741
Unrealised investment gains	511	2,046
Market value at 31 March 2024	<u>24,446</u>	<u>97,787</u>
Historical cost at 31 March 2024	<u>25,000</u>	<u>25,000</u>

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2024

3. Restricted Funds

Movement in Resources

2024

	Balance at 1 April 2023 £	Incoming £	Outgoing £	Unrealised gains £	Balance at 31 March 2024 £
Stern Family Charitable Trust Fund	1,000	-	-	-	1,000
Prize Funds	15,557	-	-	-	15,557
Audrey G. Machin Fund	5,000	-	-	-	5,000
Arthur & Jessie Barnett Memorial Fund	7,074	-	-	-	7,074
Gustave Tuck Memorial Fund	356,628	3,674	(12,770)	2,046	349,578
Plaque Fund	-	700	(700)	-	-
	<u>385,259</u>	<u>4,374</u>	<u>(13,470)</u>	<u>2,046</u>	<u>378,209</u>

2023

	Balance at 1 April 2022 £	Incoming £	Outgoing £	Unrealised losses £	Balance at 31 March 2023 £
Stern Family Charitable Trust Fund	-	1,000	-	-	1,000
Prize Funds	15,557	-	-	-	15,557
Audrey G. Machin Fund	5,000	-	-	-	5,000
Arthur & Jessie Barnett Memorial Fund	7,074	-	-	-	7,074
Gustave Tuck Memorial Fund	374,830	3,521	(18,692)	(3,031)	356,628
	<u>402,461</u>	<u>4,521</u>	<u>(18,692)</u>	<u>(3,031)</u>	<u>385,259</u>

Allocation of funds

2024

	Fixed Assets £	Cash at bank and in hand £	Other net assets £	Total £
Restricted Funds	97,787	280,422	-	378,209
Unrestricted Funds	26,617	12,217	(925)	40,960
	<u>124,404</u>	<u>292,639</u>	<u>(925)</u>	<u>419,169</u>

2023

	Fixed Assets £	Cash at bank and in hand £	Other net assets £	Total £
Restricted Funds	95,741	289,518	-	385,259
Unrestricted Funds	26,347	7,063	(900)	32,510
	<u>122,088</u>	<u>296,581</u>	<u>(900)</u>	<u>417,769</u>

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2024

4. Description of Restricted Funds

The Stern Family Charitable Trust monies were donated initially for the 130th Anniversary celebrations. However, this was felt to be excessive for this purpose and therefore the donors have been approached in order to discuss the use of the funds for the JHSE Journal.

The Gustave Tuck Collection is a collection of silver and other artefacts. Part of the collection is on long-term loan with the Jewish Museum and stored with Queens Fine Art of Wells Street, London. The rest was sold by auction in New York in December 2012. The net sales proceeds have been included in Restricted Funds under the heading of the Gustave Tuck Memorial Fund and part of the funds have been invested with Schroder Unit Trust Ltd. Under Charity Commission guidelines in respect of museum artefacts no value has been attributed to the Collection, and these are consequently not included in the balance sheet. These funds are used to provide grants to individuals carrying out research into areas of Jewish History, particular those related to the United Kingdom.

Sussex Police donated £700 for the acquisition of a plaque. This fund was completely generated and used within the year.

5. Trustee's Remuneration and Expense

No trustee received any remuneration or benefits during the current year or the previous year.

Total expenses as reimbursed for costs of Council Meetings and for visits to branches of £nil were paid to no trustees.

The charity is controlled by the trustees as a body and no individual does or could exert control.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2024

6. Statement of Financial Activities - Fund Comparatives

	Unrestricted Funds £	Restricted Funds £	Total 2023 £
INCOME AND ENDOWMENTS FROM:			
Donation and Grant income			
Donations	299	-	299
Subscriptions, donations and legacies	18,008	1,000	19,008
Trading activities			
Income from sale of books and journals	1,861	-	1,861
Charitable activities			
Event income	781	-	781
Sundry income	200	-	200
Royalties	3,031	-	3,031
Investment income			
Investment income	1,620	3,521	5,141
TOTAL INCOME	25,800	4,521	30,321
EXPENDITURE ON:			
Charitable activities			
Printing and distribution	592	-	592
Office costs	763	-	763
Rent	720	-	720
Internet/website costs	3,187	-	3,187
Awards granted	1,020	18,692	19,712
General administration and bookkeeping	9,148	-	9,148
Support costs			
Bank charges	362	-	362
Consultancy fees	125	-	125
Journal editing	7,912	-	7,912
Independent examination	1,008	-	1,008
TOTAL EXPENDITURE	24,944	18,692	43,636
Unrealised losses from investments	(758)	(3,031)	(3,789)
Unrealised gains from foreign exchange	61	-	61
NET INCOME / (EXPENDITURE)	159	(17,202)	(17,043)
Funds brought forward	32,351	402,461	434,812
Funds carried forward	32,510	385,259	417,769

Independent Examiner's Report
to the Trustees of the
JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

I report to the trustees on my examination of the accounts of the Charity for the year ended 31 March 2024, which are set out on pages 14 to 20.

Responsibilities and basis of report

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination 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 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

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

Dated: **22 October 2024**

K.J. Maggs B.A., F.C.A.
Chartered Accountant
Spalding

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

England & Wales - Charity number 1188268

Accounts

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Charity Commission Registered no. 1188268

TRUSTEES' REPORT AND FINANCIAL STATEMENTS

for the year ended 31 March 2023



JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Index

for the year ended 31 March 2023

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14	Statement of Financial Activities
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JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Charity Information

Charity Commission Registered no. 1188268

Bankers

NatWest Bank
Marble Arch Branch
81 Edgware Road
London
W2 2ZQ

Administrators

KVT Business Care
Unit 1 Chapleton Lodge
East Winch Road
Blackborough End
Kings Lynn
PE32 1SF

Independent Examiner

K.J. Maggs B.A, F.C.A.
Hoekman Way
Spalding
Lincs
PE11 3HE

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report

for the year ended 31 March 2023

The trustees present their report with the financial statements of the charity for the year ended 31 March 2023.

Structure, governance and management

Charity registration number

The Society is registered as a charity with registration number 1188268.

The Society is commonly known as JHSE.

Governing document

The Jewish Historical Society of England (the 'Society') was founded in 1893 and was governed as an unincorporated charity. On 2 March 2020, the Trustees registered the Jewish Historical Society of England CIO ("JHSE CIO") (a Charitable Incorporated Organisation) with the Charity Commission. Between that date and March 2021, operations were transferred from the Society to the JHSE CIO, in order to enjoy the benefits of incorporation. Copies of the constitutions of the Society and JHSE CIO are available from the office on request.

The office of the Society and the JHSE CIO is located at Unit 1, Chapleton Lodge, East Winch Road, Blackborough End, Kings Lynn, PE32 1SF.

The governing body of the Society, the Council, all members of which were deemed as Trustees, has now been replaced by a new Board of Trustees of the JHSE CIO. These Trustees now have limited liability.

It is intended that the Society will be wound up once all residual operations, assets and agreements are transferred to the CIO.

Objectives and Activities

The objects of the Society are:

- (a) The organisation of lectures and the publication of works on general Jewish history and literature.
- (b) The promotion and encouragement of research into Jewish history and especially the history of the Jews in the British Isles.
- (c) The transcription of documents and the collection of material relating to the history of Jews in the British Isles.
- (d) The encouragement and support of the foundation and maintenance within the British Isles of libraries, archives and museums, accessible to members of the public, for the preservation of Jewish books, documents, prints, and other objects of Jewish historical interest.

Governance

The JHSE CIO Advisory Board comprises a number of members of the former Society Council and their formal role, per the constitution of the JHSE CIO is to appoint new trustees, approve changes to the constitution and approve the winding up of the CIO. The Advisory Board is to be supplemented by a number of new members chosen to broaden the skillset and enhance diversity. There are 26 members of the Advisory Board which comprise 22 members and 4 members who are also Trustees.

The management of the JHSE CIO is vested in the Board of Trustees, comprising the President, the Honorary Secretary, the Honorary Treasurer, and not more than eight other Trustees. They are eligible for re-election after a period of three years and may hold a maximum of two consecutive terms in office.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO
Trustees' Annual Report (continued)
for the year ended 31 March 2023

Governance (continued)

The Board of Trustees during the period was:

President:	Professor Miri Rubin	
Hon Secretary, Chair	Caroline Maurice	
Hon. Treasurer:	Ian Cobden	
Chair of Awards Committee:	Professor Tony Kushner	
	Professor Michael Berkowitz	
	Michael Schraer	
	Rachel Frankel	
	Dawn Waterman	
	Michael Crook	Appointed 8 September 2022
	David Jacobs	Retired 3 July 2022

Training of Trustees

All Trustees have been provided with hard copies of 'The Essential Trustee', and other material regarding Trustee responsibilities and ethics. Attendance at a governance workshop has been recommended for all Trustees. Training updates will be provided to the Board.

Achievements and Performance

Membership

Membership numbers as at end of July 2023

Adult members	197 (down 39 on the previous year)
Student members	17 (down 9 on the previous year)
Lifetime members	13 (up 1 on the previous year)
Institutional members	35 (down 3 on the previous year)
Total	262 members

There are also 42 underpaid members (2023 - 55) which have not renewed their membership.

President Report, Professor Miri Rubin

With members of the Board of Trustees, I have helped steer the JHSE towards greater resilience in governance, finance, communication with branches and members. We have developed new collaborations with heritage and cultural institutions and societies. We have adapted to a much improved website and its operating system. And I have been particularly absorbed in planning the events for the JHSE's 130th anniversary year. Here are some of the activities for which I was responsible, always with the support of others.

I. Leading and managing the JHSE:

- as member of the Board of Trustees, its Communications Group, and its Advisory Board on several group charged with specific tasks.

II. Maintaining regular communication with the JHSE membership

- I write a monthly newsletter which is disseminated through the JHSE website through Wix. This has meant that we have made substantial savings since I compose and format (with occasional help from Jemima Jarman) directly to the Membership.
- I inform members through our website and on Twitter about upcoming events organised by JHSE and other bodies.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2023

Achievements and Performance (continued)

III. The organisation and chairing of the President's Lectures (on zoom), including:

- 15 March 2023, organised with the Institute of Jewish Studies, UCL: Jonathan Lewis spoke about his new book *Jewish Chaplaincy in the British Armed Forces*.
- 15 December 2022: Dr Emily Rose spoke about 'Little Hugh of Lincoln, Ritual Murder, Henry III and the Crown of Sicily'.
- 28 November 2022, organised with the London record Society: *London Through Russian Eyes 1896-1914*: Book Launch, Discussion, Celebration.
- 17 November 2022: Lecture and Launch of Todd Endelman's book, *The Last Anglo-Jewish Gentleman*.

IV. Mentoring, Liaison and Support of the New Generation Group (NGG)

- I have continued to work with the NGG with the aim to grow its numbers and effectiveness.
- The NGG now run reading groups workshops, training sessions,
- Plans are under way (following conversation of 19 July 2022) to integrate NGG members into the Journal as contributors and commentators.

V. Liaison with new editors of the JHSE's Journal

- In the course of 2023, the new editors Avril Alva (U of Sydney), Shirli Gilbert (UCL), Adam Mendelsohn (U of Cape Town) have taken over from Michael Berkowitz, and the first issue under their editorship will appear in 2024.
- I have worked with them to develop their vision, to clarify the relationship with the JHSE and its membership, to create ties with the NGG for the production of online copy, as well as prospective publications.
- I have worked with them to develop their vision, to clarify the relationship with the JHSE and its membership, to create ties with the NGG for the production of online copy, as well as prospective publications.

VI. Development of collaborations with the following organisations:

- Long-term liaison over the erection of the Licoricia of Winchester statue has led to my participation in a study day 21 May 2023, where I chaired the panel discussion.
- We continue to collaborate with the Jewish Genealogical Society of Great Britain, the London Jewish Museum (Whose current status is unclear).
- With BIAJS, the organisation of academics in Jewish Studies, where we sponsored a reception following my keynote Lecture at the Annual Conference 10-12 July 2023 at Edge Hill University. The JHSE banner was displayed.
- Historical Association, with the view to providing useful teaching content (liaison NGG Trustee, Dean Irwin). With Dean I developed a winter fortnightly module on The Jews of Medieval England, to which 500 people signed up.
- With Jewish Book Week, invited to Chair a session on 26 February 2023.

VII. Representing the JHSE in contacts with other organisations:

- 8 June 2023: Jews and the Portuguese Inquisition: An Event jointly organised by the Richard Barnett Fund and the JHSE.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2023

Achievements and Performance (continued)

VIII. Organising events for the 130th anniversary year, among those planned:

- 4 June 2023: Online launch of the JHSE's anniversary year with the participation of Dean Irwin, David Jacobs and Miri Rubin.
- 7 September 2023: West Ham Unites 0:5 Hakoach Vienna.
- November 2023: Lecture and launch of Shmuel Feiner's history of the Jews of 18th century Britain, in collaboration with KCL.
- 3 March 2024: 'What is Jewish History For?' – a panel discussion at the Jewish Book Week.

IX. Responding to queries on Jewish history and related matters these reach the JHSE, and in a

Finance Report, Ian Cobden

As shown on page 3 of this report, there continues to be a decline in the number of subscribing members of the Society. This has resulted in a decline in the Income.

As such, the Trustees are continuing to monitor the outgoings and have achieved major savings which has resulted in there being a small surplus of £159 for the year.

Much of the savings has been achieved through the operation of the new website. We are continually looking to improve our operations and are looking to introduce a new membership renewal system for 2024.

The first full year of the JHSE CIO has seen a reduction in members from 372 in March 2021 to 312 in March 2022. We have, however, managed to maintain our income through other sources including book sales, copyright and donations.

We are always willing to receive ideas for fund raising activities or donations to ensure the continuing future of your Society.

Financial Review

The amount awarded for grants to support academic work in various fields of Jewish history continue to exceed investment income from the restricted fund. Again this is a deliberate policy to invest in the future of Jewish history research.

The results for the charity for the financial year are detailed on pages 14 to 20.

Awards Committee, Tony Kushner

As ever, we had a wonderful range of applications both from community projects and academics from people based in the UK and abroad. This year to mark the 130th anniversary of the Jewish Historical Society of England, we allocated one of the awards to carry out an oral history project of different generations of people who have had a strong involvement in the JHSE. This is being carried out by Alan Dein, a very experienced oral historian with a strong interest in the British Jewish experience and in conjunction with the Sound Archive of the British Library where the recordings will be stored. The aim will be to have snippets of the interviews and transcripts on the JHSE website.

In addition, we were able to support four of the applications, the 200 word summaries of which are below. With the oral history project of the JHSE, the total grants awarded come to just less than £18,000.

Achievements and Performance (continued)

“Business on the Floor: Ottoman Jews in Britain’s Oriental Carpet Trade”

Grant proposal, Jewish Historical Society of England

Aviva Ben-Ur (aben-ur@judnea.umass.edu)

University of Massachusetts, Amherst (U.S.A.)

This project illustrates how Oriental carpets served as a medium through which Middle Eastern Jewish immigrants introduced their cultures to England, while at the same time responding to the demands and appraisals of a Western clientele. An examination of business and naturalization records created in the hundred years bracketing the year 1900 reveal how Ottoman Jews—parallel to Armenian immigrants—functioned as cultural brokers between East and West, developing transnational business networks that survived two world wars, and helping Britain grow as a centre of capitalism and finance.

Jewish carpet dealers leveraged their Middle Eastern background, cross-national ties, and trans-imperial connections to carve out a place for themselves in Britain’s (at that time) largely monolithic ethnic landscape, while at the same time transforming local visual culture and aesthetic tastes.

For centuries, Middle Eastern carpets have astounded people of the West with their “overwhelming” and “breathtaking” beauty and craftsmanship. Attention to this material culture will allow readers to appreciate the aesthetic reasons for the modern Oriental carpet craze. My findings will also pose a challenge to the idea that Orientalism—the Western caricature and denigration of peoples of the East—governed the relationships between local English people and Middle Eastern newcomers.

The Brady Archive

Paul Brent

A project to create an online Memory Map

To create a resource that will enable visitors to explore short video histories, archival and contemporary recordings, and examine visual materials linked to key sites in the Brady story. This resource will bring the history of Brady Clubs to life by juxtaposing photographs, recorded oral histories and memories of former Brady Club members with location maps and images.

The project aims to facilitate accessibility and understanding of the history of the Jewish East End and its impact on culture and youth work practices in the twentieth century. An example of an interactive Memory Map can be found at <https://jewisheastendmemorymap.org>. We will build the Brady Memory Map in 2023, and will launch it until 2024. Once it has been professionally built, we will be able to maintain and add to it ourselves.

The content of the Brady Memory Map will include:

- Photographs
- Oral interviews
- Videoed interviews
- Club memorabilia
- Digitised local maps
- Brady Arts and Community Centre architectural plans and drawings

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2023

Achievements and Performance (continued)

A thematic map showing Jewish settlement in canterbury in the 12th and 13th centuries and the 18th and 19th centuries, Jackie Eales

We are applying for a research grant to publish a thematic map showing the often overlooked medieval and later Jewish Quarter of Canterbury in *An Historical Atlas of Canterbury*, (2024). The Atlas will be produced by Canterbury Archaeological Trust, Canterbury Christ Church University and the Historic Towns Trust. It is part of a prestigious, internationally recognised series see *Home | Historic Towns Trust* published by the HTT, who are providing half of the full costs of £30,000.

The research questions for the map will address the extent and nature of the medieval Jewish Quarter in Canterbury, the archaeological finds there and the later revival of Jewish society post 1656. These questions will be considered in the 12,000-word Introduction and in the explanatory gazetteer of specific buildings. Research for the thematic map is conducted by Dr Jake Weekes (CAT) and mapping by Dr Alex Kent (English Heritage). I am the General Editor of the volume and its publication will promote the latest research on Canterbury and its inhabitants highlighting the importance of diversity to the growth of the city.

The Notting Hill Synagogue project, Rachel Kolsky

The Notting Hill Synagogue project seeks to produce a small book commemorating the often-forgotten Notting Hill Jewish community. Jewish London tends, understandably to be seen through the narrative of the Jewish East End. However there were vibrant, albeit smaller, communities elsewhere in London. Notting Hill is a case in point. Famous for Portobello Road Market, the 1950s Caribbean community and the eponymous 1999 film, the Jewish community, established in the late 19th century was part of its story too.

During the late-nineteenth century, a small Jewish community developed in the streets off Portobello Road. Making livings as tailors, trimming merchants and market-stall traders they lived in flats within substantial houses. The existing Bayswater and New West End synagogues were considered too grand by these families and in 1897, they commenced services in a private home. Soon after, the New West End funded a synagogue for them, consecrated in 1900.

The proposed book will take readers through the rise, fall, short lived 1980s renaissance to the inevitable closure in 2000. Focussing on Notting Hill Synagogue the book will be of interest not only to past members and their families but also those of the New West End and anyone intrigued by the social history of the area. Placing the Jewish community in context alongside the Carnival, antiques market and the film, the content, based on oral testimonies and in-depth local history research will be well illustrated providing a fun, lively and accessible book for anyone, Jewish or not, with associations or curiosity of this neighbourhood.

Publications Report, Avril Alba

Building on the achievements of outgoing Editor Prof Michael Berkowitz, the new Editorial team, Prof Shirli Gilbert, Assoc Prof Adam Mendelsohn, and Assoc Prof Avril Alba aim to expand the scope and reach of the journal. Renamed *Jewish Historical Studies: A Journal of English-Speaking Jewry*, the journal explores and documents the historical experience of Jews across the English-speaking Jewish world.

In concert with its founding mission, JHS encourages and solicits research focused on the Jewish past in pre-modern and modern England. However, reflecting its change of name, the journal will now also embrace a broader vision, devoting attention to other Jewish communities with which Anglo-Jewry shares intimate historical ties: South Africa, Canada, Australia, and the English-speaking Caribbean.

For our first volume in 2024, we will focus on South African Jewry. Further issues are planned that will explore the distinct histories of other English-speaking communities, while also encouraging comparative historical work across communities. We will seek out contributions that deepen and broaden our understanding of the characteristics of English-speaking Jewry, particularly the challenges and opportunities that liberal host societies presented to the development of Jewish life. Finally, we will trace the transnational connections between these communities and identify the ways in which a common language facilitated the emergence of a distinctive anglophone Jewish sphere.

We look forward to continuing the journal's close relationship with the JHSE, working together to forge a deeper understanding of anglophone Jewry's diverse and distinctive past.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2023

Achievements and Performance (continued)

Communications Report, Rachel Frankl

Member communications

Members receive a monthly email communication from the JHSE President. The text can also be found on the website so it can be accessed by non-members: an incentive to join because it details everything that we have done and plan to do.

A process is in place to streamline and improve messages relating to membership renewals, new members joining and membership cancellations. This will involve website upgrades and will be completed by the end of 2023.

Facebook <https://www.facebook.com/AngloJewishHistory>

The account has 2.5k members. Many aspects of Jewish history are discussed throughout the year. Promotion of our events on the platform has encouraged people to attend our meetings and talks.

Twitter <https://twitter.com/JHSEngland>

The number of people following the account has grown by about 33% in the past year and now stands at 1722.

Posts about JHSE news, people and events go out on a regular basis. The account also re-posts key information from likeminded organisations such as BIAJS, Parkes Institute, the British Board of Deputies, the Jewish museums of Manchester and London, as well as news from specialised accounts focusing on history-related subjects such as the British Jews of WW2 and WW1, medieval Jewish history, Jewish social history, European and International Jewish history, and other aspects of Jewish history related to the arts, sports, politics, literature and religious practice.

Below are analytics for the past quarter, which give an indication of recent performance. Posts receive an average of 110 impressions per day and roughly 4-5% of posts receive a reaction: a 'like', a comment or a re-post.





JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2023

Achievements and Performance (continued)

Twitter analytics

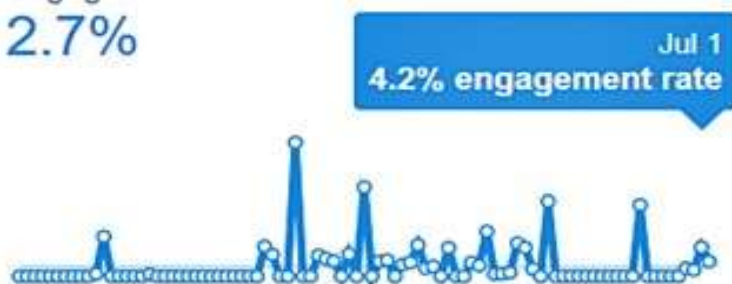
Tweets	Top Tweets	Impressions	Engagements	Engagement rate
	<p>Jewish Historical Society of England (JHSE) @JHSEngland · Jun 28 Event Invitation: LEO BAECK INSTITUTE LECTURE Thurs 29 June 6.30 pm</p> <p>Please join us for a free lecture on the heritage of the distinguished Messel family, @lbinyc, London, jointly w/ @ghilondon & support from @JCHJewishHouses</p> <p>To book jhse.org/post/event-inv...</p> <p>View Tweet activity</p>	564	22	3.9%
	<p>Jewish Historical Society of England (JHSE) @JHSEngland · Jun 7 TOMORROW! FREE! Jews & the Portuguese Inquisition</p> <p>8 June 6pm Bevis Marks Synagogue, London</p> <p>Join us at the wonderful @bevismarksuk to understand more about the the memory of Sephardic and Portuguese communities under the inquisition.</p> <p>Book a FREE ticket jhse.org/event-details/...</p>	926	58	6.3%

Engagements

Showing 91 days with daily frequency

Engagement rate

2.7%



Website www.jhse.org

January to June 2023

1117 unique visitors.

The vast majority of our website visitors come by clicking through from emails.

Visits: The homepage is the most visited page, followed by the events page.

Sales

£10,791

335 tickets sold

Highest earning events were: False Murder Accusation in Norwich (£79) and the Altalena Affair (£75).

184 subscriptions sold.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2023

Achievements and Performance (continued)

Branch Report, Michael Crook

In the period from July 2022 to June 2023 the most active branch has been Essex, with Leeds, Liverpool, Sussex and Israel also contributing to branch activity. South London has occasional meetings, usually in conjunction with other South London cultural groups.

No progress has been made in restarting the branch in Herts and Middlesex, or in Manchester, and these should be high priority for the Society in the next few months.

Whilst it is desirable to have as many meetings as possible as hybrids, not all speakers are willing to do this. Conversely, some attempts at holding hybrid meetings have resulted in poor attendances, and thus it is likely that some branches will hold Zoom only meetings, particularly during the winter months.

Essex – Richard Cohen - There have been 8 meetings of the branch in the 12 months under review, 6 hybrid and 2 in person, all held at Loughton Shul. A wide variety of topics and speakers has been provided, and a future programme is in hand.

Israel - Ken Collins - We are now meeting regularly in new premises which offer good facilities at a much more reasonable price than our former venue. Recent events have included an evening of synagogue music of the Liverpool Old Hebrew Congregation led by Jonny Greensteen and the Kol Rina Choir. Yanky Fachler addressed us on the Boycott of the Jews in Limerick and Bernard Wolfson spoke about the Tredegar Riots which both occurred in the first decade of the twentieth century. Plans are already well advanced for the new session which will begin after the autumn festivals.

Our new book of essays, *Out of Zion*, edited by Gabriel Sivan and me, based on presentations to the Society branch in recent years, was launched recently. One of the contributors Elkan Levy gave an illustrated account of historic Anglo-Jewish memorabilia. The book sells for NIS50 (£12.50) and books are available at meetings or by arrangement from myself.

Herts and Middx – Not currently active.

Leeds - Meetings/Speakers The branch continues to join with Milim at Leeds, which is the Leeds version of Jewish Book Week for Virtual meetings. Milim arrange meetings very frequently, and include JHSE in their programme about once a month. They are very good with the technology, the branch just provides the speakers. Milim still have mainly Zoom meetings.

Liverpool – Ray Morran - During the period concerned we held 5 meetings. Two were hybrid with speakers, one in person with a speaker and two were film presentations in person. A total of 113 people attended these meetings in person. The Zoom attendances for the hybrid meetings were derisory, so poor that we have halted hybrid meetings for the moment. Our expenses have amounted to £420 for these 5 meetings.

We held a very successful in person meeting on 23rd July, obviously outside the time period covered by your enquiry. Our next meeting will almost certainly be a film presentation, probably in November. We use the cinema at our local Jewish home for the aged, which has a capacity of 30.

Manchester – We are still seeking to reactivate the branch, possibly with meetings at the Jewish Museum.

South London – David Rome – There have been no further meetings since April 2022, a special Yom Hashoah meeting, but a meeting in September is in the pipeline.

Sussex - Michael Crook – We held two hybrid meetings in late 2022, and four meetings in the first months of 2023, of which the January and February meetings were on Zoom only. Attendance at the March hybrid meeting was very poor, so we reverted to Zoom only for April. Speakers in this session have included Ronnie and Lola Fraser, Dr Cecil Reid, Jennifer Craig-Norton, Katie Power, Tony Allan, and Jemima Jarman.

We are currently working on a joint meeting with the local branch of the Jewish Genealogical Society, where a short film would be shown about the Cantonists in 19th century Russia, based on a family history, probably in October or November. Other speakers will be approached once the date for this is settled, but will probably be on Zoom only.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO
Trustees' Annual Report (continued)
for the year ended 31 March 2023

Administration

KVT Business Care continues to provide us with professional administrative services. A special thank you must go to Sharon Sales whose calm, efficient and caring approach is always appreciated.

Public Benefit

The trustees declare that they have due regards to the guidance on public benefit issues by the charity commission, all trustees have been provided with the Charity Commission Guidance Notes on Public Benefit and it is the intention to review the guidance with respect to our activities annually.

We maintain that the aims and objectives of the society remain of public benefit. The society organises lectures and publishes works on general Jewish history and encourages new research especially regarding the history of the Jews in the British Isles. Where possible we transcribe documents and make documents accessible to members of the public.

Reserves policy

Unrestricted reserves

The Board of Trustees of the JHSE CIO considers it prudent to retain reserves equal to at least two year's past expenses. Reserves in excess of this sum are held pending identification of suitable causes which the JHSE CIO may wish to support, in pursuit of its overall aims.

Post Balance Sheet Events

We are not aware of any events subsequent to the balance sheet date which would impact on the financial statements for the year ended 31 March 2023.

We have also identified and reviewed the major risks to which the Society is exposed and systems have been established to mitigate those risks.

Risk management

The Trustees have a duty to identify and review the risks to which the Charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. Trustees must ensure the lasting advancement of the JHSE CIO. A series of brainstorming sessions took place discussing the current aims and objectives of the JHSE CIO and a survey of member views was undertaken which has guided the future direction of the Society.

Principal risks to the JHSE CIO

Financial viability

Although the deficit has reduced, the JHSE CIO is running a significant annual deficit, meaning that unrestricted funds are being rapidly run down and there is a risk that the JHSE CIO becoming unviable.

Our priority is to increase income and control costs. The increase in fees and payment to attend lectures has provided some revenue, and as a result of improvements to the website, we are seeing a reduction in administration costs. The finance committee is reviewing the Investment Policy with a view to securing a better return on investment than at present. The search for a Fundraising Trustee has not yet been successful but remains ongoing.

Risk of Branch Closure

Falling membership and lack of succession planning withing the Branches is being addressed enhancing the New Generation Group and encouraging their involvement within the Branches.

Loss of JHSE CIO identity

A distinct identity has been diminished as other organisations undertake similar work. This risk is being addressed by developing unique activities, but also by partnering with other organisations.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO
Trustees' Annual Report (continued)
for the year ended 31 March 2023

Trustees' Responsibilities

Charity law requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the JHSE CIO and of its financial activities for that period. In preparing those financial statements, the Board of Trustees is required to:

- (a) select suitable accounting policies and then apply them consistently;
- (b) make judgements and estimates that are reasonable and prudent;
- (c) state whether applicable accounting standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements;
- (d) prepare the financial statements on the going concern basis unless it is appropriate to presume that the Society will not continue in business.

The Board of Trustees is responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the JHSE CIO and to enable it to ensure that the financial statements comply with the Charities Act 2011 and The Charity (Accounts and Reports) regulations 2008. The Board of Trustees is responsible for safeguarding the assets and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

I would like to express my thanks to the members of the Board of Trustees who have attended many meetings and who have worked so tirelessly over the past year focusing on both administrative and strategic issues affecting the JHSE CIO with great interest, enthusiasm, humour and dedication.

All members of the JHSE benefit from the work of Sharon Sales, of KVT, who is a great asset in undertaking the administration of the Society so effectively and efficiently. I would like to thank her personally and on behalf of the Society.

I would also like to thank the Branch Chairs for their excellent efforts on behalf of the JHSE CIO and the informative lecture programmes they have produced. Once it is safe to do so, I very much look forward to meeting you all in person.

For and on behalf of the board of trustees:

Caroline Maurice
Chair, Board of Trustees

Date: **12 September 2023**

Independent Examiner's Report
to the Trustees of the
JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

I report to the trustees on my examination of the accounts of the Charity for the year ended 31 March 2022, which are set out on pages 14 to 20.

Responsibilities and basis of report

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination 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 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

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

Dated: **14 September 2023**

K.J. Maggs B.A., F.C.A.
Chartered Accountant
Spalding

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Statement of Financial Activities

for the year ended 31 March 2023

	Unrestricted £	Restricted £	Total 2023 £	Total 2022 £
INCOME AND ENDOWMENTS FROM:				
Donation and Grant income				
Donations	344	-	344	2,788
Subscriptions, donations and legacies	17,963	1,000	18,963	21,239
Trading activities				
Income from sale of books and journals	1,861	-	1,861	435
Surpluses from branches	-	-	-	977
Charitable activities				
Event income	781	-	781	1,020
Sundry income	200	-	200	3,043
Royalties	3,031	-	3,031	2,027
Investment income				
Investment income	1,620	3,521	5,141	5,372
TOTAL INCOME	25,800	4,521	30,321	36,901
EXPENDITURE ON:				
Charitable activities				
Printing and distribution	592	-	592	2,232
Office costs	(1,037)	-	(1,037)	1,361
Rent	720	-	720	720
Internet and website costs	3,187	-	3,187	4,207
Awards granted and donations	1,020	18,692	19,712	17,205
General administration and bookkeeping	9,148	-	9,148	14,088
Support costs				
Bank charges	362	-	362	282
Professional fees	107	-	107	-
Consultancy fees	125	-	125	149
Journal editing	7,912	-	7,912	7,717
Independent examination	1,008	-	1,008	1,116
TOTAL EXPENDITURE	23,144	18,692	41,836	49,077
Unrealised (losses) / gains from investments	(758)	(3,031)	(3,789)	14,777
Realised gains from foreign exchange	61	-	61	45
NET INCOME / (EXPENDITURE)	1,959	(17,202)	(15,243)	2,646
Reconciliation of funds:				
Brought forward	32,351	402,461	434,812	432,166
Carried forward	34,310	385,259	419,569	434,812

The notes on pages 16 to 20 form part of these accounts.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Balance Sheet

At 31 March 2023

	Note	2023		2021	
		£	£	£	£
NON-CURRENT ASSETS					
Intangible Fixed Assets					
Website development					
Cost			2,412		1,000
Amortisation			-		-
			<u>2,412</u>		<u>1,000</u>
Quoted Investments					
Unrestricted Fund	2	23,935		24,693	
Restricted Fund	2	<u>95,741</u>		<u>98,772</u>	
			119,676		123,465
			122,088		124,465
CURRENT ASSETS					
Prepayments		-		4,972	
Cash at bank and in hand		<u>296,581</u>		<u>306,299</u>	
			296,581		311,271
CREDITORS: Amounts falling due within one year					
Sundry creditors and accruals			900		(924)
NET CURRENT ASSETS			<u>297,481</u>		<u>310,347</u>
TOTAL ASSETS LESS LIABILITIES			<u><u>419,569</u></u>		<u><u>434,812</u></u>
CHARITY FUNDS					
Restricted funds	3		385,259		402,461
Unrestricted funds			<u>34,310</u>		<u>32,351</u>
			<u><u>419,569</u></u>		<u><u>434,812</u></u>

The financial statements on pages 14 to 20 were approved by the Trustees on **12 September 2023**.
and signed on their behalf by:

Caroline Maurice
Honorary Chairman

Ian Cobden
Honorary Treasurer

The notes on pages 16 to 20 form part of these accounts.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements

for the year ended 31 March 2023

1. Accounting Policies

The principal accounting policies adopted in the preparation of the financial statements are set out

The charity is an unincorporated charity registered in England and Wales with the Charity Commission with the registration number 217331. The charity's registered address is Unit 1 Chapleton Lodge, East Winch Road, Blackborough End, Kings Lynn, PE32 1SF.

(a) Basis of preparation of financial statements

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 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on an accrual and a going concern basis and are presented in sterling which is the functional currency of the charity.

(b) Income

All income is included on the Statement of Financial Activities when the charity is legally entitled to the income, the amount can be quantified with reasonable accuracy and it is probable it will be received.

(c) Expenditure

Expenditure is included in the Statement of Financial Activities on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

(d) Gifts in Kind

Gifts in Kind are brought into the accounts where there is either a reasonable estimate of their fair value to the funds or the amount which is actually realised. Where a value cannot be determined, or a reasonable estimate applied, the gift is not included in the Statement of Financial Activities.

(e) Foreign Currency

Foreign currency transactions are initially recognised by applying to the foreign currency amount the spot exchange rate between the functional currency and the foreign currency at the date of the transaction.

Monetary assets and liabilities denominated in a foreign currency at the balance sheet date are translated using the closing rate.

(f) Taxation

The charity is an exempt charity within the meaning of schedule 3 of the Charities Act 2011 and is considered to pass the tests set out in Paragraph 1 Schedule 6 Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

(g) Intangible assets

Intangible assets are amortised on a straight line basis over their useful lives. The useful lives of website development is ten years. Provision is made for any impairment.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2023

1. Accounting Policies (continued)

(h) Investments

Investments are recognised initially at fair value, which is normally the transactions price excluding transaction costs. Subsequently, they are measured at fair value with changes recognised in 'net gains/(losses) in investments' in the Statement of Financial Activities if their fair value can otherwise be measured reliably.

(i) Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The cost of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

(k) Debtors and creditors receivable/payable within one year

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 expenditure.

(l) Going Concern

The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for the next 12 months from authorising the financial statements.

(m) Judgements and key sources of estimation uncertainty

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the amounts reported. These estimates and judgements are continually reviewed and are based on experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period or in the period of the revision and future periods if the revision affects both current and future periods.

The following judgements have been made in the process of applying the above accounting policies that have had the most significant effect on amounts recognised in the financial statements:

Cut off - The only estimation applied in these accounts regarding cut off is concerning accruals and prepayments where an estimation of the costs relating to the relevant period were applied when relating to a different period.

2. Investments

Investments are now segregated into Unrestricted Fund Investments and Restricted Fund Investments. All are in special charity funds administered by Schroders.

	Unrestricted £	Restricted £
Market value at 1 April 2022	24,693	98,772
Unrealised investment losses	(758)	(3,031)
Market value at 31 March 2023	<u>23,935</u>	<u>95,741</u>
Historical cost at 31 March 2023	<u>25,000</u>	<u>100,000</u>

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2023

3. Restricted Funds

Movement in Resources

2023

	Balance at 1 April 2022	Incoming	Outgoing	Unrealised losses	Balance at 31 March 2023
	£	£	£	£	£
Stern Family Charitable Trust Fund	-	1,000	-	-	1,000
Prize Funds	15,557	-	-	-	15,557
Audrey G. Machin Fund	5,000	-	-	-	5,000
Arthur & Jessie Barnett Memorial Fund	7,074	-	-	-	7,074
Gustave Tuck Memorial Fund	374,830	3,521	(18,692)	(3,031)	356,628
	<u>402,461</u>	<u>4,521</u>	<u>(18,692)</u>	<u>(3,031)</u>	<u>385,259</u>

2022

	Balance at 1 April 2021	Incoming	Outgoing	Unrealised gains	Balance at 31 March 2022
	£	£	£	£	£
Prize Funds	20,557	-	(5,000)	-	15,557
Audrey G. Machin Fund	5,000	-	-	-	5,000
Arthur & Jessie Barnett Memorial Fund	7,074	-	-	-	7,074
Gustave Tuck Memorial Fund	358,610	4,398	-	11,822	374,830
	<u>391,241</u>	<u>4,398</u>	<u>(5,000)</u>	<u>11,822</u>	<u>402,461</u>

Allocation of funds

2023

	Fixed Assets	Cash at bank and in hand	Other net assets	Total
	£	£	£	£
Restricted Funds	95,741	289,518	-	385,259
Unrestricted Funds	26,347	7,063	900	34,310
	<u>122,088</u>	<u>296,581</u>	<u>900</u>	<u>419,569</u>

2022

	Fixed Assets	Cash at bank and in hand	Other net assets	Total
	£	£	£	£
Restricted Funds	98,772	303,689	-	402,461
Unrestricted Funds	25,693	2,610	4,048	32,351
	<u>124,465</u>	<u>306,299</u>	<u>4,048</u>	<u>434,812</u>

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2023

4. Description of Restricted Funds

The Stern Family Charitable Trust monies were donated initially for the 130th Anniversary celebrations. However, this was felt to be excessive for this purpose and therefore the donors have been approached in order to discuss the use of the funds for the IHSE Journal.

The Gustave Tuck Collection is a collection of silver and other artefacts. Part of the collection is on long-term loan with the Jewish Museum and stored with Queens Fine Art of Wells Street, London. The rest was sold by auction in New York in December 2012. The net sales proceeds have been included in Restricted Funds under the heading of the Gustave Tuck Memorial Fund and part of the funds have been invested with JP Morgan. Under Charity Commission guidelines in respect of museum artefacts no value has been attributed to the Collection, and these are consequently not included in the balance sheet. These funds are used to provide grants to individuals carrying out research into areas of Jewish History, particular those related to the United Kingdom.

5. Trustee's Remuneration and Expense

No trustee received any remuneration or benefits during the current year or the previous year.

Total expenses as reimbursed for costs of Council Meetings and for visits to branches of £nil were paid to no trustees.

The charity is controlled by the trustees as a body and no individual does or could exert control.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2023

6. Statement of Financial Activities - Fund Comparatives

	Unrestricted Funds £	Restricted Funds £	Total 2021 £
INCOME AND ENDOWMENTS FROM:			
Donation and Grant income			
Donations	2,788	-	2,788
Grants	-	-	-
Subscriptions, donations and legacies	21,239	-	21,239
Trading activities			
Income from sale of books and journals	435	-	435
Surpluses from branches	977	-	977
Charitable activities			
Event income	1,020	-	1,020
Sundry income	3,043	-	3,043
Royalties	2,027	-	2,027
Investment income			
Investment income	974	4,398	5,372
TOTAL INCOME	32,503	4,398	36,901
EXPENDITURE ON:			
Charitable activities			
Printing and distribution	2,232	-	2,232
Office costs	1,361	-	1,361
Rent	720	-	720
Internet/website costs	4,207	-	4,207
Awards granted	12,205	5,000	17,205
General administration and bookkeeping	14,088	-	14,088
Support costs			
Bank charges	282	-	282
Consultancy fees	149	-	149
Journal editing	7,717	-	7,717
Independent examination	1,116	-	1,116
TOTAL EXPENDITURE	44,077	5,000	49,077
Unrealised gains from investments	2,955	11,822	14,777
Unrealised gains from foreign exchange	45	-	45
NET (EXPENDITURE) / INCOME	(8,574)	11,220	2,646
Funds brought forward	40,925	391,241	432,166
Funds carried forward	32,351	402,461	434,812

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

England & Wales - Charity number 1188268

Accounts

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Charity Commission Registered no. 1188268

TRUSTEES' REPORT AND FINANCIAL STATEMENTS

for the year ended 31 March 2022



JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

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for the year ended 31 March 2022

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JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Charity Information

Charity Commission Registered no. 1188268

Bankers

NatWest Bank
Marble Arch Branch
81 Edgware Road
London
W2 2ZQ

Administrators

KVT BusinessCare
Unit 1 Chapleton Lodge
East Winch Road
Blackborough End
Kings Lynn
PE32 1SF

Independent Examiner

K.J. Maggs B.A, F.C.A.
Moore Thompson
Bank House
Broad Street
Spalding
Lincs
PE11 1TB

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report

for the year ended 31 March 2022

The trustees present their report with the financial statements of the charity for the year ended 31 March 2022.

Structure, governance and management

Charity registration number

The Society is registered as a charity with registration number 1188268.

The Society is commonly known as JHSE.

Governing document

The Jewish Historical Society of England (the 'Society') was founded in 1893 and was governed as an unincorporated charity. On 2 March 2020, the Trustees registered the Jewish Historical Society of England CIO ("JHSE CIO") (a Charitable Incorporated Organisation) with the Charity Commission. Between that date and March 2021, operations were transferred from the Society to the JHSE CIO, in order to enjoy the benefits of incorporation. Copies of the constitutions of the Society and JHSE CIO are available from the office on request.

The office of the Society and the JHSE CIO is located at Unit 1, Chapleton Lodge, East Winch Road, Blackborough End, Kings Lynn, PE32 1SF.

The governing body of the Society, the Council, all members of which were deemed as Trustees, has now been replaced by a new Board of Trustees of the JHSE CIO. These Trustees now have limited liability.

It is intended that the Society will be wound up once all residual operations, assets and agreements are transferred to the CIO.

Objectives and Activities

The objects of the Society are:

- (a) The organisation of lectures and the publication of works on general Jewish history and literature.
- (b) The promotion and encouragement of research into Jewish history and especially the history of the Jews in the British Isles.
- (c) The transcription of documents and the collection of material relating to the history of Jews in the British Isles.
- (d) The encouragement and support of the foundation and maintenance within the British Isles of libraries, archives and museums, accessible to members of the public, for the preservation of Jewish books, documents, prints, and other objects of Jewish historical interest.

Governance

The JHSE CIO Advisory Board comprises a number of members of the former Society Council and their formal role, per the constitution of the JHSE CIO is to appoint new trustees, approve changes to the constitution and approve the winding up of the CIO. The Advisory Board is to be supplemented by a number of new members chosen to broaden the skillset and enhance diversity. There are 26 members of the Advisory Board which comprise 22 members and 4 members who are also Trustees.

The management of the JHSE CIO is vested in the Board of Trustees, comprising the President, the Honorary Secretary, the Honorary Treasurer, and not more than eight other Trustees. They are eligible for re-election after a period of three years and may hold a maximum of two consecutive terms in office.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2022

Governance (continued)

The Board of Trustees during the period was:

President:	Professor Miri Rubin
Hon Secretary, Chair	Caroline Maurice
Hon. Treasurer:	Ian Cobden
Chair of Awards Committee:	Professor Tony Kushner
Chair of Publications Committee:	Professor Michael Berkowitz
	Michael Schraer
	Rachel Frankel
	David Jacobs
	Dawn Waterman
	Rachel Kolsky (resigned 16 September 2021)

Training of Trustees

All Trustees have been provided with hard copies of 'The Essential Trustee', and other material regarding Trustee responsibilities and ethics. Attendance at a governance workshop has been recommended for all Trustees. Training updates will be provided to the Board.

Achievements and Performance

Membership

Membership numbers as at end March 2022

Adult members	236 (down 64 on the previous year)
Student members	26 (up 6 on the previous year)
Lifetime members	12 (down 1 on the previous year)
Institutional members	38 (down 1 on the previous year)
Total	312 members

There are also 55 underpaid members which have not renewed their membership. These are members who have not paid the correct subscription amount.

President Report, Professor Miri Rubin

With members of the Board of Trustees, I have helped steer the JHSE towards greater resilience in governance, finance, communication with branches and members. We have developed new collaborations with heritage and cultural institutions and societies. Below are some of the activities for which I was responsible, always with the support of others.

I. Leading and managing the JHSE:

- as member of the Board of Trustees, of its Communications Group,
- on several group charged with specific tasks.

II. Maintaining regular communication with the JHSE membership

- I write a monthly newsletter which is now disseminated through the JHSE website,
- I inform members through our website and on Twitter about upcoming events organised by other

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2022

Achievements and Performance (continued)

III. The organisation and chairing of the President's Lectures (on zoom):

- 4 November 2021, 7pm- On the recently reopened Manchester Jewish Museum , with Curator Alexandra Cropper,
- 11 January 2022: *Virtual Visit to the London Jewish Museum* – with Adam Corsini,
- 20 January 2022, 8pm - Dr Rory MacLellan: *Prisoners, Refugees, Servants: Two new resources for researching Jews at the Tower of London, c. 1190-1290*,
- 24 February 2022, 8pm - Dr Chris Mitchell, *The Jewish Calendar: the Best of Both Worlds*,
- 24 March 2022, 8pm - Launch of Pam Fox's new *Jews by the Seaside* ,
- 7 April 2022, 8pm – Professor Eva Frojmovic (University of Leeds) – *Men and Women and the Medieval Sephardi Seder Table*,
- 26 May 2022, 8pm – Dr William Pimlott (Birkbeck), *Britain's Yiddish Press and the New Jewish Politics c. 1900*,
- 23 June 2022, 8pm – Caroline Gurney, 2021 JHSE Award Holder, *Mapping Bristol's Jewish*
- 3 July 2022, 2pm – with the *Jewish Genealogical Society of Great Britain and the London Jewish*

IV. Mentoring, Liaison and Support of the New Generation Group (NGG)

- I have continued to work with the NGG with the aim to grow its numbers and effectiveness.
- The NGG now run reading groups workshops, training sessions,
- Plans are under way (following conversation of 19 July 2022) to integrate NGG members into the Journal as contributors and commentators.

V. Liaison with new editors of the JHSE's Journal

I would like to take this opportunity to thank Michael Berkowitz From 2023, the new editors will be Avril Alva (U of Sydney), Shirli Gilbert (UCL), Adam Mendelsohn (U of Cape Town).

- Their orientation will be towards the Anglophone world, a direction that reflects the broad global connections of England's Jews,
- I have worked with them to develop their vision, to clarify the relationship with the JHSE and its membership, to create ties with the NGG for the production of online copy, as well as prospective publications,
- I shall act as member of the editorial board of the Journal.

VI. Development of collaborations with the following organisations:

- Long-term liaison over the erection of the Licoricia of Winchester statue with local leaders and Hampshire County Council,
- With the Jewish Genealogical Society of Great Britain,
- With the London Jewish Museum,
- With BIAJS, the organisation of academics in Jewish Studies,
- Historical Association, with the view to providing useful teaching content (liaison NGG Trustee, Dean Irwin).

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2022

Achievements and Performance (continued)

VII. Representing the JHSE in contacts with other organisations:

- 4 May 2022: Attendance at the Anglo-Israel Archaeological Society Diamond Jubilee event at the British Academy,
- 12 July 2022: Opening of the panel on Jewish heritage in Ukraine, at the BIAJS Annual Conference, KCL,
- 22 July 2022: Address at the unveiling of a plaque in memory of the medieval Jewish community of Worcester.

VIII. Sharing expertise when approached as President:

- Interview/video on the Council of Oxford 1222, for the use of the Diocese of Oxford,
- History Extra podcast about Licoricia of Winchester and Jews in Medieval England,
- Podcast about the Tower of London, with Historic Royal Palaces.

IX. Responding to queries on Jewish history that reach the JHSE

Finance Report, Ian Cobden

The first full year of the JHSE CIO has seen a reduction in members from 372 in March 2021 to 312 in March 2022. We have, however, managed to maintain our income through other sources including book sales, copyright and donations.

We have been especially prudent with our outgoings and have managed to reduce them where possible but even with this the accounts show an annual deficit of £8,574. This is, however, around half of the expected and budgeted deficit.

There are still a number of members who have not updated their membership payments; we encourage members to do. We are not seeking to make a profit but survive in a competitive world.

We will be closely monitoring expenses as we commence "in-person" events. As with all costs that we meet on a daily basis, our initial enquiries show that the venue hire costs have increased steeply which may result in such meetings being reduced.

We are always willing to receive ideas for fund raising activities or donations to ensure the continuing future of your Society.

Financial Review

The amount awarded for grants to support academic work in various fields of Jewish history continue to exceed investment income from the restricted fund. Again this is a deliberate policy to invest in the future of Jewish history research.

The results for the charity for the financial year are detailed on pages 11 to 16.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2022

Achievements and Performance (continued)

Research Awards Committee Recommendations, Tony Kushner

The Awards Committee met on 27 June (Tony Kushner, chair; Michael Berkowitz; Andrea Schatz; Adam Sutcliffe; Joanna Newman). There were 11 applications and the quantity of applications was higher than last year and overall of a much stronger quality as is clear from the number who we wish to help.

The awards committee would like to recommend to the JHSE Trustees the following eight applications for support. They include a variety of community projects relating to British Jewry and PhD projects covering an equally wide range of topics from young generation researchers:

- 1 Julia Pascal **£4,000** for a video history project with films and other public outcomes on the Blackpool Jewish community.
- 2 Julia Pohlmann **£2,437** (Aberdeen University PhD student) on eighteenth century British Jewish spaces for research visit to American Jewish Archives, Cincinnati.
- 3 John Russell **£3,500** (Queen Mary College PhD student) for fees towards PhD on Zionism in the Labour Party.
- 4 Sophie Wilson **£1800** (Queen Mary College PhD student) for translation of material in Yiddish relating to British women's suffrage movement.
- 5 Nathan Abrams **£3,000** (Bangor University) for printing of walking tour guides for North Wales Jewish communities.
- 6 Amanda Bergen **£500** for oral histories of Litvak identities in Leeds.
- 7 Samuel Brady **£455** (University of Glasgow PhD student) for travel costs to research Ludwig Guttman's relationship to Judaism.
- 8 Paul Brent **£3,000** for further cataloguing and processing of materials relating to the Brady Street Club

Total: **£18,692.**

Branch reports for AGM to be held on 8 September 2022

Essex – Richard Cohen - There have been 11 meetings of the branch in the last 15 months, all hybrid, held at Loughton Shul. Future programme in hand.

Israel - Ken Collins - We have had about six Zoom meetings over the past year - from the launch of my book Zev's Children to the last meeting with Eve Weinberg talking about her family's story from Uzbekistan to Paris and London. We expect to go back to in person meetings.

Hall prices have increased substantially and we will probably be leaving Bet Avi Chai - which will be charging £400 a meeting. We are trying out a new venue in place of Bet Avi Chai - which has a more attractive price.

Our first meeting will be launching a new book of essays, edited by Gabriel Sivan and me, based on presentations to the Society branch in recent years.

Herts and Middx – Ian Daniels – Not currently active.

Leeds - Meetings/Speakers - The branch has joined with Milim at Leeds, which is the Leeds version of Jewish Book Week for Virtual meetings. Milim arrange meetings very frequently, and include JHSE in their programme about once a month. They are very good with the technology, the branch just provides the speakers. Milim still have mainly Zoom meetings.

Liverpool – Ray Morran (replacing John Cowell) - We have held 3 meetings, two by Zoom and one in person. The Zoom meetings were not well supported either locally or nationally. A Zoom talk by Robert David on 1 May had about 25 "attendees", but numbers were grossly inflated by his friends and family. Our first in person meeting for over 2 years had an attendance of 32. I think it's fair to say that the Liverpool community is suffering from Zoom fatigue.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2022

Achievements and Performance (continued)

Branch reports for AGM to be held on 8 September 2022 (continued)

Liverpool – Ray Morran (continued) - We hope to have more in person meetings because this is the format which appeals to our local supporters, the vast majority of whom are not national members. We are looking into the feasibility of hybrid meetings but would need both financial and technical support to hold meetings in this way.

Prior to the pandemic we were using the local Jewish care home. This remains closed to public meetings for the foreseeable future. We used a synagogue room for our recent in person meeting. It was satisfactory for that event but probably not for hybrid meetings.

We have no other events planned at the moment but we are looking at arranging one or two outings.

Manchester – We are seeking to reactivate the branch, possibly with meetings at the Jewish Museum.

South London – David Rome – Several meetings have been held since April 2021, some in conjunction with 'Jewish Culture South of the River'. Subjects have included 'Rabbis, Rothschilds and Rogues', and a special Yom Hashoah meeting featuring a Holocaust survivor and a Kindertransportee.

Sussex - Michael Crook – We held two meetings in late 2021, and four meetings in the first months of 2022, all on Zoom except the April meeting, when we returned to Ralli Hall in Hove for the first time in over two years. Attendance was about 25 people, and a very interesting talk on 'Sassoon Landmarks in Brighton & Hove' was given by Gordon Franks. Other speakers have included Rachel Kolsky, Dr Mike Levy, Dr David Barnett, and Emma Mason from Eastbourne on Barnett Freedman, artist and lithographer.

Ralli Hall, where we have met in the past have good broadband, so we are considering whether it is possible to hold hybrid meetings there in October and November. Our concern is whether attendances will suffer at live meetings in January and February, so we may revert to Zoom only for those meetings.

Communications Report, Rachel Frankl

Over the past year, the JHSE has engaged with a wide audience in the UK and beyond. The JHSE now has over 1400 Twitter followers and over 2000 Facebook followers: we have used social media particularly effectively to promote our Zoom lectures and our newly-revamped series of live talks. Both platforms not only promote our own news and events but also promote information about other organisations, institutions and societies working in the field of Jewish history, which helps us to be seen as an information hub. This in turn encourages lively debate, interest in our work and a desire to know more about Jewish history.

The JHSE website remains the first port of call for online visitors who want to know more about Anglo-Jewry. A survey of members and friends was conducted last year, and the results offered a wealth of information about what our motivated audience would like from us. This important data served as a critical basis for the reworking of our website which was completely redone and relaunched in early 2022. The revamp was cost-effective, with the main cost benefits realised on an ongoing basis because most website pages can be updated without the involvement of paid staff - a real savings for the JHSE. At the same time, feedback on the new website has been very positive. We now have a clear, inviting way to introduce the JHSE's work and the work of our branches and this encourages people to be involved on a local level. Much of the Transactions archive has also been made available online and it is now much easier to join, renew, stay up to date, and attend our events.

We aim to build on these recent successes and make good use of our streamlined communications tools to encourage greater involvement with the JHSE and grow our income over the next year.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2022

Achievements and Performance (continued)

The Transactions Report, Michael Berkowitz

More than a dozen years ago, the request to assume the editorship of Transactions, which was the major duty of the head of “publications” for the Jewish Historical Society of England, came as a big surprise in my life as a historian. I am extremely grateful to Jeremy Schonfield, who is much more than a “contributing editor”, Katharine Ridler, for her unequalled expertise as copy-editor, and Tony Kitzinger’s skill as designer. I also am deeply thankful for the goodwill and ongoing support of the JHSE in its commitment to the journal. I hope that some of the changes I have introduced may help the journal to persist as a vibrant organ of the Society. I strongly believe that thoughtful, constructive change is a good thing. It is in that spirit that I wish to welcome, with the greatest warmth and enthusiasm, a new team of editors, Shirli Gilbert, Adam Mendelsohn, and Avril Alba, to lead the next stage of Transactions.

Administration

KVT Business Care continues to provide us with professional administrative services. A special thank you must go to Sharon Sales whose calm, efficient and caring approach is always appreciated.

Public Benefit

The trustees declare that they have due regards to the guidance on public benefit issues by the charity commission, all trustees have been provided with the Charity Commission Guidance Notes on Public Benefit and it is the intention to review the guidance with respect to our activities annually.

We maintain that the aims and objectives of the society remain of public benefit. The society organises lectures and publishes works on general Jewish history and encourages new research especially regarding the history of the Jews in the British Isles. Where possible we transcribe documents and make documents accessible to members of the public.

Reserves policy

Unrestricted reserves

The Board of Trustees of the JHSE CIO considers it prudent to retain reserves equal to at least two year's past expenses. Reserves in excess of this sum are held pending identification of suitable causes which the JHSE CIO may wish to support, in pursuit of its overall aims.

Post Balance Sheet Events

We are not aware of any events subsequent to the balance sheet date which would impact on the financial statements for the year ended 31 March 2022.

We have also identified and reviewed the major risks to which the Society is exposed and systems have been established to mitigate those risks.

Risk management

The Trustees have a duty to identify and review the risks to which the Charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. Trustees must ensure the lasting advancement of the JHSE CIO. A series of brainstorming sessions took place discussing the current aims and objectives of the JHSE CIO and a survey of member views was undertaken which has guided the future direction of the Society.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the year ended 31 March 2022

Principal risks to the JHSE CIO

Financial viability

Although the deficit has reduced, the JHSE CIO is running a significant annual deficit, meaning that unrestricted funds are being rapidly run down and there is a risk that the JHSE CIO becoming unviable.

Our priority is to increase income and control costs. The increase in fees and payment to attend lectures has provided some revenue, and as a result of improvements to the website, we are seeing a reduction in administration costs. The finance committee is reviewing the Investment Policy with a view to securing a better return on investment than at present. The search for a Fundraising Trustee has not yet been successful but remains ongoing.

Risk of Branch Closure

Falling membership and lack of succession planning withing the Branches is being addressed enhancing the New Generation Group and encouraging their involvement within the Branches.

Loss of JHSE CIO identity

A distinct identity has been diminished as other organisations undertake similar work. This risk is being addressed by developing unique activities, but also by partnering with other organisations.

Trustees' Responsibilities

Charity law requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the JHSE CIO and of its financial activities for that period. In preparing those financial statements, the Board of Trustees is required to:

- (a) select suitable accounting policies and then apply them consistently;
- (b) make judgements and estimates that are reasonable and prudent;
- (c) state whether applicable accounting standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements;
- (d) prepare the financial statements on the going concern basis unless it is appropriate to presume that the Society will not continue in business.

The Board of Trustees is responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the JHSE CIO and to enable it to ensure that the financial statements comply with the Charities Act 2011 and The Charity (Accounts and Reports) regulations 2008. The Board of Trustees is responsible for safeguarding the assets and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

I would like to express my thanks to the members of the Board of Trustees who have attended many meetings and who have worked so tirelessly over the past year focusing on both administrative and strategic issues affecting the JHSE CIO with great interest, enthusiasm, humour and dedication.

All members of the JHSE benefit from the work of Sharon Sales, of KVT, who is a great asset in undertaking the administration of the Society so effectively and efficiently. I would like to thank her personally and on behalf of the Society.

I would also like to thank the Branch Chairs for their excellent efforts on behalf of the JHSE CIO and the informative lecture programmes they have produced. Once it is safe to do so, I very much look forward to meeting you all in person.

For and on behalf of the board of trustees:

Caroline Maurice
Chair, Board of Trustees

Date: **8 September 2022**

Independent Examiner's Report
to the Trustees of the
JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

I report to the trustees on my examination of the accounts of the Charity for the year ended 31 March 2022, which are set out on pages 11 to 16.

Responsibilities and basis of report

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination 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 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

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

Dated: **27 October 2022**

K.J. Maggs B.A., F.C.A.
MOORE THOMPSON
Chartered Accountants
Spalding

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Statement of Financial Activities

for the year ended 31 March 2022

	Unrestricted £	Restricted £	Total 2022 £	Total 2021 £
INCOME AND ENDOWMENTS FROM:				
Donation and Grant income				
Donations	2,788	-	2,788	-
Grants	-	-	-	20,000
Subscriptions, donations and legacies	21,239	-	21,239	17,372
Trading activities				
Income from sale of books and journals	435	-	435	141
Surpluses from branches	977	-	977	-
Charitable activities				
Event income	1,020	-	1,020	475
Sundry income	3,043	-	3,043	-
Royalties	2,027	-	2,027	2,604
Investment income				
Investment income	974	4,398	5,372	590
TOTAL INCOME	32,503	4,398	36,901	41,182
EXPENDITURE ON:				
Charitable activities				
Printing and distribution	2,232	-	2,232	118
Office costs	1,361	-	1,361	1,391
Rent	720	-	720	180
Internet and website costs	4,207	-	4,207	1,375
Awards granted	12,205	5,000	17,205	-
General administration and bookkeeping	14,088	-	14,088	3,917
Support costs				
Bank charges	282	-	282	67
Professional fees	-	-	-	300
Consultancy fees	149	-	149	-
Journal editing	7,717	-	7,717	-
Independent examination	1,116	-	1,116	888
TOTAL EXPENDITURE	44,077	5,000	49,077	8,236
Unrealised gains from investments	2,955	11,822	14,777	3,619
Unrealised gains / (losses) from foreign exchange	45	-	45	(10)
NET (EXPENDITURE) / INCOME	(8,574)	11,220	2,646	36,555
Reconciliation of funds:				
Brought forward	40,925	391,241	432,166	395,611
Carried forward	32,351	402,461	434,812	432,166

The notes on pages 13 to 16 form part of these accounts.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Balance Sheet

At 31 March 2021

		2021		2021	
	Note	£	£	£	£
NON-CURRENT ASSETS					
Intangible Fixed Assets					
Website development					
Cost			1,000		-
Amortisation			-		-
			1,000		-
Quoted Investments					
Unrestricted Fund	2	24,693		21,738	
Restricted Fund	2	98,773		86,951	
			123,466		108,689
			124,466		108,689
CURRENT ASSETS					
Prepayments		4,972		-	
Cash at bank and in hand		306,298		324,365	
			311,270		324,365
CREDITORS: Amounts falling due within one year					
Sundry creditors and accruals			(924)		(888)
			310,346		323,477
NET CURRENT ASSETS			434,812		432,166
TOTAL ASSETS LESS LIABILITIES			434,812		432,166
CHARITY FUNDS					
Restricted funds	3		402,461		391,241
Unrestricted funds			32,351		40,925
			434,812		432,166

The financial statements on pages 11 to 16 were approved by the Trustees on **8 September 2022** and signed on their behalf by:

Caroline Maurice
Honorary Chairman

Ian Cobden
Honorary Treasurer

The notes on pages 13 to 16 form part of these accounts.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements

for the year ended 31 March 2022

1. Accounting Policies

The principal accounting policies adopted in the preparation of the financial statements are set out

The charity is an unincorporated charity registered in England and Wales with the Charity Commission with the registration number 217331. The charity's registered address is Unit 1 Chapleton Lodge, East Winch Road, Blackborough End, Kings Lynn, PE32 1SF.

(a) Basis of preparation of financial statements

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 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on an accrual and a going concern basis and are presented in sterling which is the functional currency of the charity.

(b) Income

All income is included on the Statement of Financial Activities when the charity is legally entitled to the income, the amount can be quantified with reasonable accuracy and it is probable it will be received.

(c) Expenditure

Expenditure is included in the Statement of Financial Activities on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

(d) Gifts in Kind

Gifts in Kind are brought into the accounts where there is either a reasonable estimate of their fair value to the funds or the amount which is actually realised. Where a value cannot be determined, or a reasonable estimate applied, the gift is not included in the Statement of Financial Activities.

(e) Foreign Currency

Foreign currency transactions are initially recognised by applying to the foreign currency amount the spot exchange rate between the functional currency and the foreign currency at the date of the transaction.

Monetary assets and liabilities denominated in a foreign currency at the balance sheet date are translated using the closing rate.

(f) Taxation

The charity is an exempt charity within the meaning of schedule 3 of the Charities Act 2011 and is considered to pass the tests set out in Paragraph 1 Schedule 6 Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

(g) Intangible assets

Intangible assets are amortised on a straight line basis over their useful lives. The useful lives of website development is ten years. Provision is made for any impairment.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2022

1. Accounting Policies (continued)

(h) Investments

Investments are recognised initially at fair value, which is normally the transactions price excluding transaction costs. Subsequently, they are measured at fair value with changes recognised in 'net gains/(losses) in investments' in the Statement of Financial Activities if their fair value can otherwise be measured reliably.

(i) Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The cost of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

(k) Debtors and creditors receivable/payable within one year

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 expenditure.

(l) Going Concern

The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for the next 12 months from authorising the financial statements.

(m) Judgements and key sources of estimation uncertainty

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the amounts reported. These estimates and judgements are continually reviewed and are based on experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period or in the period of the revision and future periods if the revision affects both current and future periods.

The following judgements have been made in the process of applying the above accounting policies that have had the most significant effect on amounts recognised in the financial statements:

Cut off - The only estimation applied in these accounts regarding cut off is concerning accruals and prepayments where an estimation of the costs relating to the relevant period were applied when relating to a different period.

2. Investments

Investments are now segregated into Unrestricted Fund Investments and Restricted Fund Investments. All are in special charity funds administered by Schroders.

	Unrestricted	Restricted
	£	£
Market value transferred from unincorporated charity	21,738	86,951
Unrealised investment gains	2,955	11,822
	<u>24,693</u>	<u>98,773</u>
Historical cost at 31 March 2022	<u>21,738</u>	<u>86,951</u>

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2022

3. Restricted Funds

Movement in Resources

2022

	Balance at 1 April 2021 £	Incoming £	Outgoing £	Unrealised gain/(loss) £	Balance at 31 March 2022 £
Prize Funds	20,557	-	(5,000)	-	15,557
Audrey G. Machin Fund	5,000	-	-	-	5,000
Arthur & Jessie Barnett Memorial Fund	7,074	-	-	-	7,074
Gustave Tuck Memorial Fund	358,610	4,398	-	11,822	374,830
	<u>391,241</u>	<u>4,398</u>	<u>(5,000)</u>	<u>11,822</u>	<u>402,461</u>

2022

	Fixed Asset Investments £	Cash at bank and in hand	Other net assets £	Total £
Restricted Funds	98,773	303,688	-	402,461
Unrestricted Funds	24,693	2,610	4,048	32,351
	<u>123,466</u>	<u>306,298</u>	<u>4,048</u>	<u>434,812</u>

The Gustave Tuck Collection is a collection of silver and other artefacts. Part of the collection is on long term loan with the Jewish Museum in Camden Town, London. The rest was sold by auction in New York in December 2012. The net sales proceeds have been included in Restricted Funds under the heading of the Gustave Tuck Memorial Fund and part of the funds have been invested with JP Morgan. Under Charity Commission guidelines in respect of museum artefacts no value has been attributed to the Collection, and these are consequently not included in the balance sheet. These funds are used to provide grants to individuals carrying out research into areas of Jewish History, particular those related to the United Kingdom.

4. Trustee's Remuneration and Expense

No trustee received any remuneration or benefits during the current year or the previous year.

Total expenses as reimbursed for costs of Council Meetings and for visits to branches of £nil were paid to no trustees.

The charity is controlled by the trustees as a body and no individual does or could exert control.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the year ended 31 March 2022

5. Statement of Financial Activities - Fund Comparatives

	Unrestricted Funds £	Restricted Funds £	Total 2021 £
INCOME AND ENDOWMENTS FROM:			
Donation and Grant income			
Grants	-	20,000	20,000
Subscriptions, donations and legacies	17,372	-	17,372
Trading activities			
Income from sale of books and journals	141	-	141
Charitable activities			
Event income	475	-	475
Sundry income	-	-	-
Royalties	2,604	-	2,604
Investment income			
Investment income	123	467	590
TOTAL INCOME	<u>20,715</u>	<u>20,467</u>	<u>41,182</u>
EXPENDITURE ON:			
Charitable activities			
Event costs	-	-	-
Printing and distribution	118	-	118
Meeting and Lecture expenses	-	-	-
Office costs	1,391	-	1,391
Rent	180	-	180
Advertising	-	-	-
Internet/website costs	1,375	-	1,375
Awards granted	-	-	-
Outreach and development work	-	-	-
General administration and bookkeeping	3,917	-	3,917
Trustee meetings	-	-	-
Support costs			
Bank charges	67	-	67
Professional fees	300	-	300
Consultancy fees	-	-	-
Independent examination	888	-	888
TOTAL EXPENDITURE	<u>8,236</u>	<u>-</u>	<u>8,236</u>
Unrealised gains from investments	724	2,895	3,619
Unrealised losses from foreign exchange	(10)	-	(10)
NET INCOME	<u>13,193</u>	<u>23,362</u>	<u>36,555</u>
Funds brought forward	27,732	367,879	395,611
Funds carried forward	<u>40,925</u>	<u>391,241</u>	<u>432,166</u>

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

England & Wales - Charity number 1188268

Accounts

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Charity Commission Registered no. 1188268

TRUSTEES' REPORT AND FINANCIAL STATEMENTS

for the period 2 March 2020 to 31 March 2021



JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

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for the period 2 March 2020 to 31 March 2021

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JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Charity Information

Charity Commission Registered no. 1188268

Bankers

NatWest Bank
Marble Arch Branch
81 Edgware Road
London
W2 2ZQ

Administrators

KVT BusinessCare
Unit 1 Chapleton Lodge
East Winch Road
Blackborough End
Kings Lynn
PE32 1SF

Independent Examiner

K.J. Maggs B.A, F.C.A.
Moore Thompson
Bank House
Broad Street
Spalding
Lincs
PE11 1TB

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report

for the period 2 March 2020 to 31 March 2021

The trustees present their report with the financial statements of the charity for the period 2 March 2020 to 31 March 2021.

Structure, governance and management

Charity registration number

The Society is registered as a charity with registration number 1188268.

The Society is commonly known as JHSE.

Governing document

The Jewish Historical Society of England (the 'Society') was founded in 1893 and was governed as an unincorporated charity. On 2 March 2020, the Trustees registered the Jewish Historical Society of England CIO ("JHSE CIO") (a Charitable Incorporated Organisation) with the Charity Commission. Between that date and March 2021, operations were transferred from the Society to the JHSE CIO, in order to enjoy the benefits of incorporation. Copies of the constitutions of the Society and JHSE CIO are available from the office on request.

The office of the Society and the JHSE CIO is located at Unit 1, Chapleton Lodge, East Winch Road, Blackborough End, Kings Lynn, PE32 1SF.

The governing body of the Society, the Council, all members of which were deemed as Trustees, has now been replaced by a new Board of Trustees of the JHSE CIO. These Trustees now have limited liability.

It is intended that the Society will be wound up once all residual operations, assets and agreements are transferred to the CIO.

Objectives and Activities

The objects of the Society are:

- (a) The organisation of lectures and the publication of works on general Jewish history and literature.
- (b) The promotion and encouragement of research into Jewish history and especially the history of the Jews in the British Isles.
- (c) The transcription of documents and the collection of material relating to the history of Jews in the British Isles.
- (d) The encouragement and support of the foundation and maintenance within the British Isles of libraries, archives and museums, accessible to members of the public, for the preservation of Jewish books, documents, prints, and other objects of Jewish historical interest.

Governance

The JHSE CIO Advisory Board comprises a number of members of the former Society Council. There are currently 19 members and their formal role, per the constitution of the JHSE CIO is to appoint new trustees, approve changes to the constitution and approve the winding up of the CIO. The Advisory Board is to be supplemented by a number of new members chosen to broaden the skillset and enhance diversity.

The management of the JHSE CIO is vested in the Board of Trustees, comprising the President, the Honorary Secretary, the Honorary Treasurer, and not more than eight other Trustees. They are eligible for re-election after a period of three years and may hold a maximum of two consecutive terms in office.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the period 2 March 2020 to 31 March 2021

Governance (continued)

The Board of Trustees during the period was:

President:	Professor Miri Rubin
Hon Secretary, Chair	Caroline Maurice
Hon. Treasurer:	Ian Cobden
Chair of Awards Committee:	Professor Tony Kushner
Chair of Publications Committee:	Professor Michael Berkowitz
	Michael Schraer
	Rachel Frankel
	David Jacobs
	Rachel Kolsky
	Dawn Waterman

A trustee skills evaluation determined that a Trustee responsible for Communications and Social Media was necessary. Rachel Frankel was appointed to the position and became a member of the Board of Trustees on 15 July 2020; she was recruited through the Jewish Volunteering Network. Her position was ratified at the Council meeting on 26 November 2020.

A Finance Committee comprising Ian Cobden (Chair), Michael Schraer and Caroline Maurice reviews the income and expenses of the Society and determines ways to increase revenue with a view to securing the financial viability of the Society. As a result of their assessment, the Society decided to introduce payment for lecture attendance by non-members, with effect from 1 January 2021.

Membership fees have also increased, although Student membership will remain subsidised at £20 per year. The Finance Committee has also initiated a review of investment policy, with the objective of optimising the balancing of risk and return re-deploying our financial resources.

A Membership Survey is to be undertaken during the summer 2021 to ascertain their views and a "brainstorming" exercise undertaken by Trustees has helped shape the future direction of the CIO.

Training of Trustees

All Trustees have been provided with hard copies of 'The Essential Trustee', and other material regarding Trustee responsibilities and ethics. Attendance at a governance workshop has been recommended for all Trustees. Training updates will be provided to the Board.

Achievements and Performance

Membership

Membership numbers as at end March 2021

Adult members	300 (down 16 on previous year)
Student members	20 (up 6)
Lifetime members	13 (Unchanged)
Institutional members	39 (down 10)
Total	372 members

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the period 2 March 2020 to 31 March 2021

Achievements and Performance (continued)

President Report, Professor Miri Rubin

When I last reported in May 2020, I had only been President for 5 months. Since then a very active year has followed. We have continued to confront the circumstances of Covid-19, and to work on the revision of many of the JHSE CIO's activities, while also adding new ones. I am happy to say that I am now President of an organisation with robust procedures governing its interactions, and with a reach that continues to grow while becoming more diverse. I am grateful to the wonderful Trustees with whom I work closely, and especially of our Chair, with whom contact is quite frequent. We are also very fortunate in Sharon Sales' contributions, which are effective and swift in response.

I. Organisation of the Lecture Series

Over the last twelve months we have continued to offer via Zoom monthly Lectures organised by myself and by the Branches (See below for Branch Report). All are aimed at offering JHSE CIO members and non members access to innovative historical research and topics of general interest. Those Lectures organised by myself were:

- 2 July 2020: Dr Joe Cronin (QMUL): Forgiveness and Retribution: The Holocaust in Recent Popular Culture.
- 10 September 2020: Professor David Feldman (Birkbeck), Bigots, Semites and Anti-Semites: Jews and their Critics in Victorian Britain.
- 15 October 2020: Dr Sally Dixon-Smith (Historical Royal Palaces) Place of Safety, Place of Menace: The Tower of London and the Jews.
- 3 December 2020: Professor Paul Cartledge (Cambridge): Taking Back Control: Hanukkah for the Hasmoneans – a Hellenistic History
- 21 January 2021: Professor Jon Parry (Cambridge), Benjamin Disraeli – Revisited.
- 18 February 2021: Dr Ben Outhwaite (Genizah Research Unit, Cambridge University Library), The Cairo Genizah in the Digital Age.
- 18 March 2021: Professor Bryan Cheyette (University of Reading), Israel Zangwill: Ghetto, Zion, Melting-Pot.
- 29 April 2021: Professor Sarah Rees-Jones (University of York) and Ms Shannon Kirshner (Chair, Liberal Jewish Community of York), The Jews of York and the Commemoration of the Massacre in March 1190.
- 27 May 2021: Dr Hannah Ewence (University of Chester), Borders, Ports and Pestilence: Disease in the Age of Jewish Mass Migration.

II. JHSE CIO Governance Reform

Building on the work we began in 2020, we have continued to reform and clarify the procedures which govern the JHSE CIO, the role of the Branches, the range of expertise on the Board of Trustees, the communication policy and practice, and the definition and clarification of our mission. My role has often been to compose and disseminate information to our members in order to convey and explain the thinking behind changes, as in the new membership policies enacted in January 2021.

III. The Future: JHSE's New Generation Group

As I reported in 2020, with the Board of Trustees encouragement, I have developed a New Generation Group (NGG), which is coordinated by PhD student Sophie Wilson of Queen Mary University of London (QMUL). After the preliminary activities of setting up the NGG, it is now 63 members strong and active, holding regular meetings and reading groups.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the period 2 March 2020 to 31 March 2021

Achievements and Performance (continued)

Book Launch events:

2 October 2020: Kenneth Austin, *The Jews and the Reformation*, 2020.

10 March 2021: Shmuel Feiner, *The Jewish Eighteenth Century*, 2020

State-of the-Art Colloquium

10 January 2021: *Jews in Modern Britain: Within, Without, and In-between Colloquium and Outreach to Teachers*.

16-17 February 2021: *English Medieval Jewish Communities* - Organised by Dr Dean Irwin and Dr Rebecca Searby, and attracted c. 140 participants, including many teachers.

IV. Communication

Website

The website delivered in January 2020 was not designed by the current Board of Trustees, and does not meet all the JHSE CIO's needs, nor operates at the speed and with the ease our members can expect.

Monthly Email letter

A monthly email is distributed to JHSE CIO members reporting on the Presidential lectures, selected Branch events and as well as seasonal and topical issues.

Twitter

Rachel Frankel has developed a Twitter presence allowing us to cross advertise lectures and events to several kindred institutions.

V. Contacts with other Organisations

In keeping with the JHSE CIO's mission to extend and expand the interest in Jewish history, effort has been made to identify activities and forge contacts beyond the JHSE CIO. Through the Board's academic network in the UK and abroad, new alliances are being forged:

- **Jewish Book Week (JBW)** - work to involve JHSE CIO members in educational work promoted by the JBW. I offered three sessions in schools, and we will liaise with JBW for next year's events.
- **Manchester Jewish Museum (MJW)** – we have established contact with the MJW with view to the revival of the Manchester branch later in 2021.
- **Licoricia of Winchester Statue Group** – Liaison with the group erecting a statue commemorating a medieval Jewish business woman. This is in associated with Hampshire County Council's development of a curriculum about the Jews of medieval Winchester, including a book about Licoricia's life with which I have helped the author Rebecca Abrams.
- JHSE CIO was approached by the President of the **Historical Society of Israel** for mutual activities, such as the January 2021 event on the state of modern Jewish British history.
- With the help of Trustee David Jacobs, President the of **Jewish Genealogical Society of Great Britain** (JGSGB), we have and will collaborate in the organisation of events that appeal in particular to JHSE CIO members and non-members interested in family history. For example, on 22 April 2021, Nadia Ragozhina presented her new book, *Worlds Apart: Uncovering the Lost Memories of My Jewish Family*.
- On 22 April 2021, I attended a research seminar at the archives of mid-Glamorgan organised with the **Jewish History Association of South Wales** (JHASW). I am in conversation with the JHASW on collaboration with JHSE CIO.

VI. Responding to External Communications

I have endeavoured to answer promptly the many approaches from projects, individuals in search of information, our Branches, and institutions. When there is cost involved, or indeed future action, or any ethical consideration, I consult members of the Board, who are invariably helpful.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the period 2 March 2020 to 31 March 2021

Achievements and Performance (continued)

VII. Acting as Ambassador

I am invited to speak at events the JHSE CIO sponsors, ranging from an evening relating to the Passport Project at JW3 to a talk to Jewish Societies of schools.

I continue to learn about the JHSE CIO, and look forward to a time when our activities can become more sociable and visible, in a world beyond Covid-19.

Branch Report

Most Branches have continued a programme of lectures throughout the past year, with audience attendance ranging from 20 people to over 100. While lecture attendees are now familiar with Zoom technology, the booking system is cumbersome and requires simplification. The Board of Trustees is reviewing the website booking system as a matter of urgency.

The introduction of a £5 payment for lectures by non members has not resulted in a reduction of attendee numbers.

Over the course of the year, over 700 different people have attended over 40 JHSE CIO lectures organised by the Branches. We anticipate that, going forward, virtual lectures held via Zoom will continue in a hybrid model, with some Branches also scheduling in-person meetings.

The JHSE CIO is aware of the ongoing viability of Branches in certain locations, but is encouraged by initiatives to establish new Branches.

We would like to express our thanks to Jemima Jarman and Sharon Sales for the support they provide to both Branch chairs and lecture attendees.

Awards Report, Professor Tony Kushner

All members of the Awards Committee have agreed to continue assessing applications this year:

Professor Tony Kushner	Chair	University of Southampton
Andrea Schatz		Kings College London
Joanna Newman		Association of Commonwealth Universities
Michael Berkowitz		University College London
Adam Sutcliffe		Kings College London

One of the goals of the JHSE CIO is to foster and encourage research, publications and heritage work related to Jewish history in general and British Jewish history in particular.

For the past few years the Society and now the JHSE CIO has been in the wonderful position of being able to fund awards to foster and support research, publications and heritage work on Jewish history as a whole and British Jewish history in particular. A distinguished group of scholars inside and outside the academic world have acted as a panel to judge the annual applications and their recommendations are then put to the Board of Trustees for approval.

In 2020, we were able to support:

- heritage work to produce a digital map of Jewish Manchester (Rachel Lichtenstein);
- research on the Bath Jewish burial ground (Christina Hilsenrath);
- the Brady Street youth club (Paul Brent);
- the heritage of South Wales Jewry (Klavdija Erzen);
- academic work on Anglo-Jewish responses to Biblical criticism (Edward Breuer);
- the special heritage of the Jewish East End;
- refugee photographers (Amanda Hopkinson); and
- the synagogues of South Wales (Cai Perry-Jones).

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the period 2 March 2020 to 31 March 2021

Achievements and Performance (continued)

Awards Report, Professor Tony Kushner

In total, awards of £23,218 were granted. All those supported will be expected to present their work in the public sphere in the form of talks, publications and exhibitions.

I am also very pleased to report that we will be able to make new awards to begin from the summer of 2021 and these will be supplemented through the generosity of a legacy from our late and dedicated member, David Hyman, which allow an annual prize of up to £5,000 for work on the Port Jews of Britain.

As you will see, the varied work supported by the JHSE CIO shows the vibrancy of British Jewish studies in both community and academic work.

Publications Report, Professor Michael Berkowitz

This last issue of *Jewish Historical Studies: Transactions of the Jewish Historical Society of England*, vol. 52, which has been published and sent out to members, did not quite proceed as planned. It was expected that it would include a number of articles from a conference to be held at UCL on the theme of "internment", to coincide with the anniversary of the internment of Jewish "enemy aliens" during World War II in Britain. That conference, due to Covid, did not take place. But four articles appeared, based on what would have been presentations at that conference—including original pieces by Bernard Wasserstein, Tine Destrooper, Jennifer Craig-Norton and Susan Cohen.

There also were a number of 'regular' articles, some of which by first-time contributors to *Transactions*.

A substantial portion of the journal was dedicated to our late colleague, and past president of the JHSE, Professor Ada Rapoport-Albert. There were ten separate contributions of varying lengths, a personal and scholarly article in Hebrew by Rachel Elijor, and an abridged version of that article.

All of this involved a great deal of teamwork for which I am very grateful.

Jeremy Schonfield, as contributing editor, and Katharine Ridler, copy-editor, performed exemplary service. Tony Kitzinger, again, did a fantastic job with design. (Katharine and Tony are the only paid-professionals in this process.)

There was also a number of book reviews.

There is, already, a planned tribute to Jonathan Steinberg (z"l) of Cambridge and the University of Pennsylvania, and permission has been arranged for a reprinting a section (at no cost) of Tara Westover's best-seller *Educated* (about Professor Steinberg). We also plan to have some revised articles from a conference in South Africa.

It is hoped that greater numbers of contributors to *Transactions* will take on roles in the life of the JHSE CIO.

Administration

KVT Business Care continues to provide us with professional administrative services. A special thank you must go to Sharon Sales whose calm, efficient and caring approach is always appreciated.

Public Benefit

The trustees declare that they have due regards to the guidance on public benefit issues by the charity commission, all trustees have been provided with the Charity Commission Guidance Notes on Public Benefit and it is the intention to review the guidance with respect to our activities annually.

We maintain that the aims and objectives of the society remain of public benefit. The society organises lectures and publishes works on general Jewish history and encourages new research especially regarding the history of the Jews in the British Isles. Where possible we transcribe documents and make documents accessible to members of the public.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the period 2 March 2020 to 31 March 2021

Achievements and Performance (continued)

Financial Review

The amount awarded for grants to support academic work in various fields of Jewish history continue to exceed investment income from the restricted fund. Again this is a deliberate policy to invest in the future of Jewish history research.

The results for the charity for the financial year are detailed on pages 11 to 15.

Reserves policy

Unrestricted reserves

The Board of Trustees of the JHSE CIO considers it prudent to retain reserves equal to at least two year's past expenses. Reserves in excess of this sum are held pending identification of suitable causes which the JHSE CIO may wish to support, in pursuit of its overall aims.

Post Balance Sheet Events

We are not aware of any events subsequent to the balance sheet date which would impact on the financial statements for the period 2 March 2020 to 31 March 2021.

We have also identified and reviewed the major risks to which the Society is exposed and systems have been established to mitigate those risks.

Risk management

The Trustees have a duty to identify and review the risks to which the Charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. Trustees must ensure the lasting advancement of the JHSE CIO. A series of brainstorming sessions took place discussing the current aims and objectives of the JHSE CIO and a survey of member views will be conducted.

Principal risks to the JHSE CIO

Financial viability

At present, the JHSE CIO is running a significant annual deficit, meaning that unrestricted funds are being rapidly run down and the JHSE CIO becoming unviable.

This risk is being urgently addressed by increasing membership fees, which have remained constant for over 4 years and introducing payment by non-members to attend lectures. In addition, a full review of costs will be undertaken as will a continued search for a Trustee with specific skills fund-raising.

Risk of Branch Closure

Falling membership and lack of succession planning withing the Branches is being addressed enhancing the New Generation Group and encouraging their involvement within the Branches.

Loss of JHSE CIO identity

A distinct identity has been diminished as other organisations undertake similar work. This risk is being addressed by developing unique activities, but also by partnering with other organisations. We will devote to this issue a brainstorming session in 2021.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Trustees' Annual Report (continued)

for the period 2 March 2020 to 31 March 2021

Trustees' Responsibilities

Charity law requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the JHSE CIO and of its financial activities for that period. In preparing those financial statements, the Board of Trustees is required to:

- (a) select suitable accounting policies and then apply them consistently;
- (b) make judgements and estimates that are reasonable and prudent;
- (c) state whether applicable accounting standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements;
- (d) prepare the financial statements on the going concern basis unless it is appropriate to presume that the Society will not continue in business.

The Board of Trustees is responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the JHSE CIO and to enable it to ensure that the financial statements comply with the Charities Act 2011 and The Charity (Accounts and Reports) regulations 2008. The Board of Trustees is responsible for safeguarding the assets and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

I would like to express my thanks to the members of the Board of Trustees who have attended many meetings and who have worked so tirelessly over the past year focusing on both administrative and strategic issues affecting the JHSE CIO with great interest, enthusiasm, humour and dedication.

I would also like to thank the Branch Chairs for their excellent efforts on behalf of the JHSE CIO and the informative lecture programmes they have produced. Once it is safe to do so, I very much look forward to meeting you all in person.

For and on behalf of the board of trustees:

Caroline Maurice
Chair, Board of Trustees

Date: 6 July 2021

Independent Examiner's Report
to the Trustees of the
JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

I report to the trustees on my examination of the accounts of the Charity for the period 2 March 2020 to 31 March 2021, which are set out on pages 11 to 15.

Responsibilities and basis of report

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination 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 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

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

Dated: **6 July 2021**

K.J. Maggs B.A., F.C.A.
MOORE THOMPSON
Chartered Accountants
Spalding

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Statement of Financial Activities

for the period 2 March 2020 to 31 March 2021

	Unrestricted £	Restricted £	Total 2021 £
INCOME AND ENDOWMENTS FROM:			
Donation and Grant income			
Grants		20,000	20,000
Subscriptions, donations and legacies	17,372	-	17,372
Trading activities			
Income from sale of books and journals	141	-	141
Charitable activities			
Event income	475	-	475
Sundry income	-	-	-
Royalties	2,604	-	2,604
Investment income			
Investment income	123	467	590
TOTAL INCOME	20,715	20,467	41,182
EXPENDITURE ON:			
Charitable activities			
Printing and distribution	118	-	118
Meeting and lecture expenses	-	-	-
Office costs	1,391	-	1,391
Rent	180	-	180
Internet and website costs	1,375	-	1,375
Awards granted	-	-	-
General administration and bookkeeping	3,917	-	3,917
Trustee meetings	-	-	-
Support costs			
Bank charges	67	-	67
Professional fees	300	-	300
Consultancy fees	-	-	-
Independent examination	888	-	888
TOTAL EXPENDITURE	8,236	-	8,236
Unrealised gains from investments	724	2,895	3,619
Unrealised losses from foreign exchange	(10)	-	(10)
NET INCOME	13,193	23,362	36,555
Reconciliation of funds:			
Brought forward	-	-	-
Transferred from unincorporated charity	27,732	367,879	395,611
Carried forward	40,925	391,241	432,166

The notes on pages 13 to 15 form part of these accounts.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Balance Sheet

At 31 March 2021

	Note	£	2021 £
NON-CURRENT ASSETS			
Quoted Investments			
Unrestricted Fund	2	21,738	
Restricted Fund	2	<u>86,951</u>	
			108,689
CURRENT ASSETS			
Sundry debtors		-	
Cash at bank and in hand		<u>324,365</u>	
			324,365
CREDITORS: Amounts falling due within one year			
Sundry creditors and accruals			(888)
NET CURRENT ASSETS			<u>323,477</u>
TOTAL ASSETS LESS LIABILITIES			<u><u>432,166</u></u>
CHARITY FUNDS			
Restricted funds	3		391,241
Unrestricted funds			<u>40,925</u>
			<u><u>432,166</u></u>

The financial statements on pages 11 to 15 were approved by the Trustees on **6 July 2021** and signed on their behalf by:

Caroline Maurice
Honorary Chairman

Ian Cobden
Honorary Treasurer

The notes on pages 13 to 15 form part of these accounts.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements

for the period 2 March 2020 to 31 March 2021

1. Accounting Policies

The principal accounting policies adopted in the preparation of the financial statements are set out

The charity is an unincorporated charity registered in England and Wales with the Charity Commission with the registration number 217331. The charity's registered address is Unit 1 Chapleton Lodge, East Winch Road, Blackborough End, Kings Lynn, PE32 1SF.

(a) Basis of preparation of financial statements

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 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on an accrual and a going concern basis and are presented in sterling which is the functional currency of the charity.

(b) Income

All income is included on the Statement of Financial Activities when the charity is legally entitled to the income, the amount can be quantified with reasonable accuracy and it is probable it will be received.

(c) Expenditure

Expenditure is included in the Statement of Financial Activities on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

(d) Gifts in Kind

Gifts in Kind are brought into the accounts where there is either a reasonable estimate of their fair value to the funds or the amount which is actually realised. Where a value cannot be determined, or a reasonable estimate applied, the gift is not included in the Statement of Financial Activities.

(e) Foreign Currency

Foreign currency transactions are initially recognised by applying to the foreign currency amount the spot exchange rate between the functional currency and the foreign currency at the date of the transaction.

Monetary assets and liabilities denominated in a foreign currency at the balance sheet date are translated using the closing rate.

(f) Taxation

The charity is an exempt charity within the meaning of schedule 3 of the Charities Act 2011 and is considered to pass the tests set out in Paragraph 1 Schedule 6 Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

(g) Investments

Investments are recognised initially at fair value, which is normally the transactions price excluding transaction costs. Subsequently, they are measured at fair value with changes recognised in 'net gains/(losses) in investments' in the Statement of Financial Activities if their fair value can otherwise be measured reliably.

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the period 2 March 2020 to 31 March 2021

1. Accounting Policies (continued)

(h) Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The cost of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

(i) Debtors and creditors receivable/payable within one year

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 expenditure.

(j) Going Concern

The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for the next 12 months from authorising the financial statements.

(k) Judgements and key sources of estimation uncertainty

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the amounts reported. These estimates and judgements are continually reviewed and are based on experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period or in the period of the revision and future periods if the revision affects both current and future periods.

The following judgements have been made in the process of applying the above accounting policies that have had the most significant effect on amounts recognised in the financial statements:

Cut off - The only estimation applied in these accounts regarding cut off is concerning accruals and prepayments where an estimation of the costs relating to the relevant period were applied when relating to a different period.

2. Investments

Investments are now segregated into Unrestricted Fund Investments and Restricted Fund Investments. All are in special charity funds administered by Schroders.

	Unrestricted	Restricted
	2021	2021
	£	£
Market value transferred from unincorporated charity	21,013	84,053
Unrealised investment gains	2,615	10,458
	<u>21,738</u>	<u>86,951</u>
Historical cost at 31 March 2021	<u>25,000</u>	<u>100,000</u>

JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

Notes to the financial statements (continued)

for the period 2 March 2020 to 31 March 2021

3. Restricted Funds

Movement in Resources

2021

	Balance at 1 January 2021 £	Incoming £	Outgoing £	Unrealised gain/(loss) £	Balance at 31 March 2021 £
Prize Funds	557	20,000	-	-	20,557
Audrey G. Machin Fund	5,000	-	-	-	5,000
Arthur & Jessie Barnett Memorial Fund	7,074	-	-	-	7,074
Gustave Tuck Memorial Fund	346,567	1,585	-	10,458	358,610
	<u>359,198</u>	<u>21,585</u>	<u>-</u>	<u>10,458</u>	<u>391,241</u>

2021

	Fixed Asset Investments £	Cash at bank and in hand	Other net assets £	Total £
Restricted Funds	86,951	304,290	-	391,241
Unrestricted Funds	21,738	20,075	(888)	40,925
	<u>108,689</u>	<u>324,365</u>	<u>(888)</u>	<u>432,166</u>

The Gustave Tuck Collection is a collection of silver and other artefacts. Part of the collection is on long term loan with the Jewish Museum in Camden Town, London. The rest was sold by auction in New York in December 2012. The net sales proceeds have been included in Restricted Funds under the heading of the Gustave Tuck Memorial Fund and part of the funds have been invested with JP Morgan. Under Charity Commission guidelines in respect of museum artefacts no value has been attributed to the Collection, and these are consequently not included in the balance sheet. These funds are used to provide grants to individuals carrying out research into areas of Jewish History, particular those related to the United Kingdom.

4. Trustee's Remuneration and Expense

No trustee received any remuneration or benefits during the current year or the previous year.

Total expenses as reimbursed for costs of Council Meetings and for visits to branches of £nil were paid to no trustees.

The charity is controlled by the trustees as a body and no individual does or could exert control.