

**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**

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**for the year ended 31 March 2023**

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**JEWISH HISTORICAL SOCIETY OF ENGLAND CIO**

**Charity Information**

**Charity Commission Registered no. 1188268**

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**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

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The governing body of the Society, the Council, all members of which were deemed as Trustees, has now been replaced by a new Board of Trustees of the JHSE CIO.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

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### 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)
<b>Total</b>	<b>262 members</b>

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 130<sup>th</sup> 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

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### 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

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### Achievements and Performance (continued)

#### ***VIII. Organising events for the 130<sup>th</sup> 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



### **Achievements and Performance (continued)**

#### **A thematic map showing Jewish settlement in canterbury in the 12<sup>th</sup> and 13<sup>th</sup> centuries and the 18<sup>th</sup> and 19<sup>th</sup> 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.

## 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

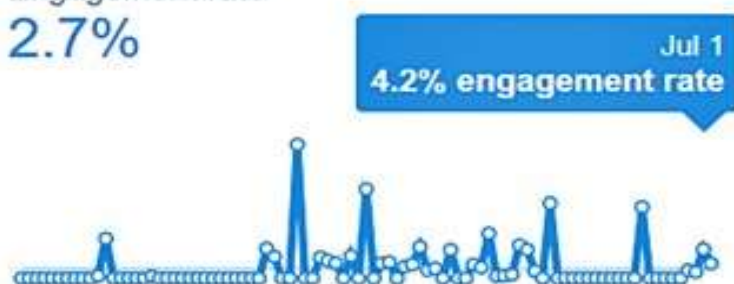
Tweets	Top Tweets	Impressions	Engagements	Engagement rate
		564	22	3.9%
<b>Jewish Historical Society of England (JHSE)</b> @JHSEngland · Jun 28 Event Invitation: LEO BAECK INSTITUTE LECTURE Thurs 29 June 6.30 pm  Please join us for a free lecture on the heritage of the distinguished Messel family, @lbinyc,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

### Engagements

Showing 91 days with daily frequency

Engagement rate

2.7%



Website [www.jhse.org](https://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

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#### 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

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### **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**

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### **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**

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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 £
<b>INCOME AND ENDOWMENTS FROM:</b>				
<b>Donation and Grant income</b>				
Donations	344	-	344	2,788
Subscriptions, donations and legacies	17,963	1,000	18,963	21,239
<b>Trading activities</b>				-
Income from sale of books and journals	1,861	-	1,861	435
Surpluses from branches	-	-	-	977
<b>Charitable activities</b>				
Event income	781	-	781	1,020
Sundry income	200	-	200	3,043
Royalties	3,031	-	3,031	2,027
<b>Investment income</b>				
Investment income	1,620	3,521	5,141	5,372
<b>TOTAL INCOME</b>	<b>25,800</b>	<b>4,521</b>	<b>30,321</b>	<b>36,901</b>
<b>EXPENDITURE ON:</b>				
<b>Charitable activities</b>				
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
<b>Support costs</b>				
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
<b>TOTAL EXPENDITURE</b>	<b>23,144</b>	<b>18,692</b>	<b>41,836</b>	<b>49,077</b>
Unrealised (losses) / gains from investments	(758)	(3,031)	(3,789)	14,777
Realised gains from foreign exchange	61	-	61	45
<b>NET INCOME / (EXPENDITURE)</b>	<b>1,959</b>	<b>(17,202)</b>	<b>(15,243)</b>	<b>2,646</b>
<b>Reconciliation of funds:</b>				
<b>Brought forward</b>	32,351	402,461	434,812	432,166
<b>Carried forward</b>	<b>34,310</b>	<b>385,259</b>	<b>419,569</b>	<b>434,812</b>

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



# JEWISH HISTORICAL SOCIETY OF ENGLAND CIO

## Balance Sheet

At 31 March 2023

		2023	2021
	Note	£	£
<b>NON-CURRENT ASSETS</b>			
<b>Intangible Fixed Assets</b>			
Website development			
Cost		2,412	1,000
Amortisation		-	-
		<u>2,412</u>	<u>1,000</u>
<b>Quoted Investments</b>			
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
<b>CURRENT ASSETS</b>			
Prepayments		-	4,972
Cash at bank and in hand		<u>296,581</u>	<u>306,299</u>
		296,581	311,271
<b>CREDITORS: Amounts falling due within one year</b>			
Sundry creditors and accruals		900	(924)
<b>NET CURRENT ASSETS</b>		<u>297,481</u>	<u>310,347</u>
<b>TOTAL ASSETS LESS LIABILITIES</b>		<u><u>419,569</u></u>	<u><u>434,812</u></u>
<b>CHARITY FUNDS</b>			
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

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### 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**

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### **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 £
<b>INCOME AND ENDOWMENTS FROM:</b>			
<b>Donation and Grant income</b>			
Donations	2,788	-	2,788
Grants	-	-	-
Subscriptions, donations and legacies	21,239	-	21,239
<b>Trading activities</b>			
Income from sale of books and journals	435	-	435
Surpluses from branches	977	-	977
<b>Charitable activities</b>			
Event income	1,020	-	1,020
Sundry income	3,043	-	3,043
Royalties	2,027	-	2,027
<b>Investment income</b>			
Investment income	974	4,398	5,372
<b>TOTAL INCOME</b>	<b>32,503</b>	<b>4,398</b>	<b>36,901</b>
<b>EXPENDITURE ON:</b>			
<b>Charitable activities</b>			
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
<b>Support costs</b>			
Bank charges	282	-	282
Consultancy fees	149	-	149
Journal editing	7,717	-	7,717
Independent examination	1,116	-	1,116
<b>TOTAL EXPENDITURE</b>	<b>44,077</b>	<b>5,000</b>	<b>49,077</b>
Unrealised gains from investments	2,955	11,822	14,777
Unrealised gains from foreign exchange	45	-	45
<b>NET (EXPENDITURE) / INCOME</b>	<b>(8,574)</b>	<b>11,220</b>	<b>2,646</b>
<b>Funds brought forward</b>	<b>40,925</b>	<b>391,241</b>	<b>432,166</b>
<b>Funds carried forward</b>	<b>32,351</b>	<b>402,461</b>	<b>434,812</b>