

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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for the year ended 31 March 2025

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The governing body of the Society, the Council, all members of which were deemed as Trustees, has now been replaced by a new Board of Trustees of the JHSE CIO.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

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					
Cost			2,412		2,412
Amortisation			(483)		(241)
			<u>1,929</u>		<u>2,171</u>
Quoted Investments					
Unrestricted Fund	2	25,469		24,446	
Restricted Fund	2	<u>101,878</u>		<u>97,787</u>	
			<u>127,347</u>		<u>122,233</u>
			<u>129,276</u>		<u>124,404</u>
CURRENT ASSETS					
Accrued income		-		3,051	
Cash at bank and in hand		<u>302,202</u>		<u>292,639</u>	
			302,202		295,690
CREDITORS: Amounts falling due within one year					
Sundry creditors and accruals			(4,706)		(925)
			<u>297,496</u>		<u>294,765</u>
NET CURRENT ASSETS					
			<u>426,772</u>		<u>419,169</u>
TOTAL ASSETS LESS LIABILITIES					
			<u>426,772</u>		<u>419,169</u>
CHARITY FUNDS					
Restricted funds	3		384,483		378,209
Unrestricted funds			<u>42,289</u>		<u>40,960</u>
			<u>426,772</u>		<u>419,169</u>

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	1,023	4,091
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>

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